



2014 Trends Report

Top 10 Global Spa and Wellness Trends Forecast



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This is our 11th annual Trends Forecast, and I have never been more excited about the spa and wellness industry. So many of the trends we predicted over the past decade are now coming to fruition...helping businesses thrive and helping people live more healthfully every day. At the same time, we are seeing new, provocative ideas that will have a dramatic impact around the globe.

The 2014 trends reflect an industry that is reimagining core elements of spa and wellness and exploring brave, new directions. It is gratifying to see a healthy dose of healthy travel in several of the trends; bold new ideas in mainstays like aromatherapy and hot springs take hold; and the development of new models for classic destination spas. It is also rewarding to watch trends in technology, beauty and fitness shape how we will live (and look)—and even take note of how the industry will help people address dying, illness and major life changes.

And finally, there is a trend we forecasted in 2013 that continues to capture our imagination: mindfulness. We feel strongly that it is important to watch how this is evolving, and you'll see a short synopsis of this "über trend" in the report.

Spafinder Wellness 365™'s Trends Forecast reports on what is happening in our industry, but we also strive to present a true forecast of what lies ahead. Some ideas are still on the horizon, but we think you'll see much more about them in the not-too-distant future!

I'd like to thank Spafinder Wellness, Inc.®'s new Chief Brand Officer Mia Kyricos, who has joined our trend-tracking team, as well as thank our research and editorial teams, led by Beth McGroarty, for their many contributions in making this report so robust. Together, we remain passionate about the spa and wellness community and our collective mission to help people feel good and live well all year round.

The Spafinder Wellness 365 Trends Report is an in-depth forecast of the most significant global trends that will impact the industry and consumers in the year ahead. Developed by a team of research analysts, editors and industry experts, the forecast is based on ongoing surveys of the 20,000-plus spa, wellness and beauty providers in the Spafinder Wellness 365 Network, thousands of travel agents and hundreds of thousands of consumers—as well as interviews with industry leaders, an extensive analysis of current market research and visits to spa and wellness businesses by the company's editorial team.

The report is developed under the direction of Susie Ellis, president of Spafinder Wellness, Inc., and is considered the most authoritative forecast in the industry.

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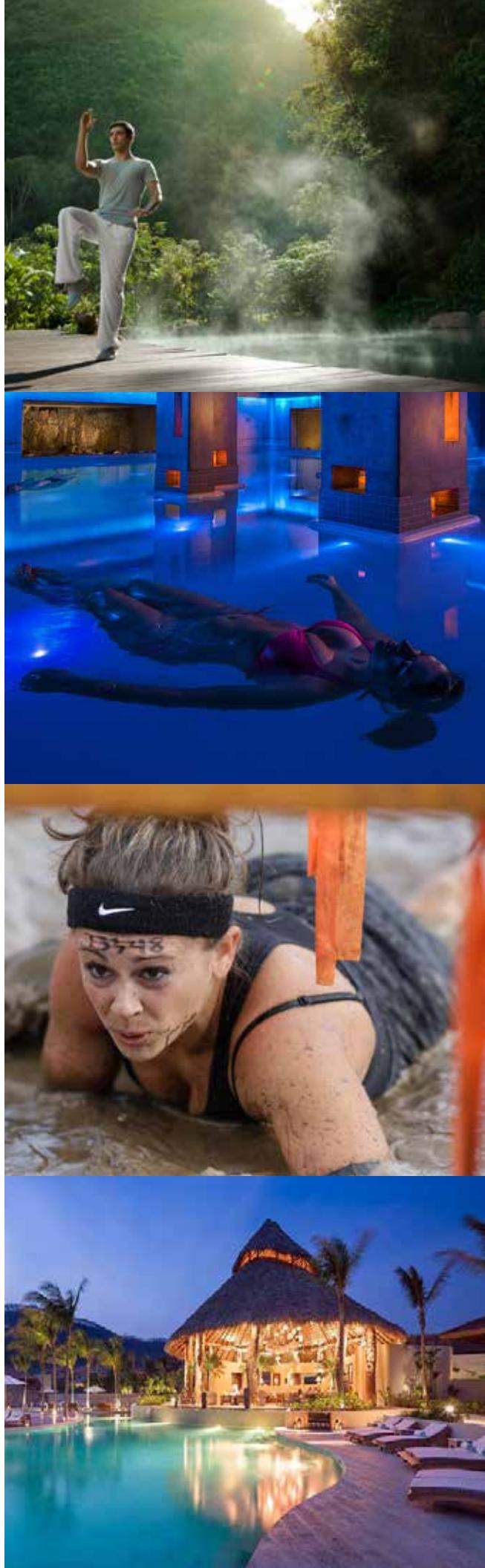
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Über Trend: Your Mind is What Matters

MINDFUL LIVING

Weaving its way through every trend in 2014 is the simple, but compelling, act of mindful living: The idea of attentiveness to the present moment can help clear the clutter in your mind caused by the over-stimulation of today's supercharged world.

This is the über trend that's on everyone's mind—from the Dalai Lama to the co-founder of Twitter to your yoga studio down the street. Whether you tap into mindfulness through an app on your smartphone, by turning all your digital devices off, by hitting a yoga class (another non-stop trending activity) or by practicing straightforward meditation, it's your mind that matters.

"A healthy mind is the true key to happiness," said His Holiness, the Dalai Lama, during his keynote speech at the recent Global Spa and Wellness Summit. "We spend so much energy on physical health and hygiene—but we need to spend more on mental hygiene and the 'hygiene' of emotion."

This is one of the biggest movements the wellness industry has ever seen. People are craving (and *needing*) a reboot of their brains—and the reasons are plentiful. Mindfulness gives us an effective tool to cope with today's highly stressed-out world. As highlighted in our 2013 trend "The Mindfulness Massage," it has been proven to re-wire our brains to become less anxious, happier, more focused and even more creative.

This is why this movement appeals not only to the New Age hippie within us but also to the over-achieving Silicon Valley exec. Look at the success of Google's Zen-like employee program, "Search Inside Yourself," which has attracted thousands of Googlers, encouraging them to focus on the here and now; witness the buzz around the discovery that Steve Jobs attributed much of his success to the practice of meditation and Zen Buddhism. All walks of life are waking up to the fact that mindful living breeds a healthy mind, one that is able to focus and get things done.

And more and more studies are surfacing that compel us to continue this quest for a "change of mind." This includes research that shows an hour of yoga a week reduces stress levels in employees by a third and cuts healthcare costs by an average of \$2,000 a year, while other studies have linked mindfulness to improved sleep, emotional stability, better cognitive functions and increased productivity.

The physical benefits of spa and wellness activities have long been known to reduce stress and relax our bodies, but in 2014 and beyond there will be a sharp focus on interweaving mindfulness techniques into these practices to help us reach a whole new place of serenity and calm. And perhaps more importantly, give us the tools we need to focus on what's important in our lives, both at work (with renewed focus and productivity) and at home (helping us to be in the moment with those we care about).

1



Healthy Hotels 2.0

MGM Grand, Las Vegas, was spotlighted in last year's trend forecast for its innovative "Stay Well" rooms. It has been so successful that the hotel is tripling the number of wellness rooms.



Photo courtesy of MGM Grand

Healthy Hotels 2.0



Photos courtesy of EVEN Hotels

The wellness-focused **EVEN Hotels** (US) grabbed headlines since it was announced in 2012, but in 2014 people will actually get to experience them. A key element that's part of a wider 2014 hotel trend: grab-and-go healthy food markets vs. stuffy, eat-too-much restaurants.

Last year we explored how, after a century of hotel experiences synonymous with bacchanalian excess, more properties were on a new health kick and branding and re-branding around wellness. But the most powerful trends, like "Healthy Hotels," are more than passing news and become megatrends, because they fulfill profound human needs. In 2014, look for hotels to move from healthy as a marketing differentiator to deeper, more multi-faceted programming that stretches well beyond the "free stretch band." The healthy hotel will ultimately become more inspired and comprehensive and move from virtuous exception to part of the hospitality vernacular, because everyone, everywhere, now more than ever, needs travel that restores.

BEYOND HEALTHY HOTELS "LITE"

Real travelers are driving this trend. And it is not surprising: A recent Spafinder Wellness 365 consumer survey¹ found that 85 percent of people have returned from a vacation less rejuvenated and well than when they left. Travelers further report they now want a whole lot of "wellness" in their travel destinations: 87 percent want healthier food, 82 percent spa/massage, 82 percent nature experiences, 73 percent eco-conscious properties, 70 percent gyms with cardio and weights, 54 percent healthy sleep programs and 47 percent meditation/mindfulness programming.

BRANDING & REBRANDING

In 2013 we analyzed how more hotel groups (like Westin or then-just-announced EVEN Hotels) were branding around wellness, just as more (like Fairmont Hotels & Resorts or MGM Grand) were re-branding around new healthy food, fitness and sleep offerings. Well, that wellness "brand-wagon" has only since shifted into overdrive.

"Pure" Branding Moves

IHG's all-wellness-focused, mid-priced EVEN Hotels were announced in 2012 and this spring IHG unveils their Norwalk, Connecticut and Rockville, Maryland properties, with three more in Manhattan and Brooklyn confirmed for 2015. EVEN's vast "Brand Experience Space" has given people an idea of what to expect: a "Wellness Island" replaces a traditional reception desk; a centerpiece fitness studio with space for small classes; in-room "Training Zones" and spa showers; open-style markets with super-healthy, grab-and-go food you can order on iPads; and mindful "think healthy" messages painted throughout. EVEN also just launched a website, WellWellWell.com, to help U.S. travelers pinpoint healthy food and fitness options coast-to-coast.

Healthy for guests *and* for the environment hotels are key to the trend, and Starwood will make brand moves in this direction in 2014. Its more affordable, eco-focused Element (all LEED certified, strong healthy food and fitness offerings, and touches like iPhone-charging stationary bikes) will open outside North America beginning this year: Frankfurt in 2014, China in 2015 and Oman in 2017. And in 2014, Starwood will take the wraps off its eco-luxury 1Hotel & Home brand, with its tagline "100% Natural." Again, all properties are LEED-certified, there's reclaimed materials and the "sounds and smells of nature" throughout, and farm-to-table dining. Miami, Manhattan and Brooklyn open this year, with the first global property planned for Marrakesh.

Rebranding Moves

It's safe to say that most major hotel chains made some wellness re-branding moves last year—and those that haven't soon will. Trump Hotels rolled out "Trump Wellness," revolving around "Nourish" (organic, vegan and gluten-free menus) and "Travel

FUELING THE TREND

Growing Wellness Tourism Industry

"Healthy Hotels" falls within the category of wellness tourism, which sits right at the explosive intersection of the global US\$2 trillion wellness² and US\$6.6 trillion³ travel and tourism economies. A research report⁴ conducted by SRI International for the Global Spa & Wellness Summit (GSWS) recently found that wellness tourism already represents a US\$439 billion market, or 14 percent of world tourism expenditures. And the growing demand for healthier travel of all breeds means this category will grow nine percent annually through 2017, 50 percent faster than "regular" tourism. Hotels are rolling out healthy programming because they're taking note of these facts, and they also like spending by wellness tourists, which is on average, 130 percent more than regular tourists. This trend is good for guests and good for business.

The GSWS report makes a critical distinction between two types of wellness tourism: "primary," or trips taken expressly for wellness purposes, and "secondary," when wellness-related activities are part of a trip. The secondary-purpose tourist drives the vast lion's share of total wellness tourism trips and expenditures (85-percent-plus), and it's these mainstream travelers that are largely fueling the healthy hotel boom.

A Need To Rejuvenate

Given the new, always-on work model, more people aren't just stressed out—they're burned out. But they're taking fewer vacation days each year: Americans only take 10 of 14 vacation days given, the Japanese 7 of 18 and South Koreans only 7 of 10.⁵ When you have one precious week, rejuvenation matters.

Rising Healthcare Costs

Report after report reveals how runaway corporate healthcare costs are devouring corporate profits. More businesses (and their road warriors) are demanding healthier business travel and meetings, a key galvanizer of the healthy hotel trend.

More hotels like **Wyndham's TRYP Hotels** (Europe & Latin America) are serving up everything one needs to work out: from clothes/shoes on loan, to in-room equipment like elliptical machines.



Fit," featuring in-room workout equipment, on-loan exercise clothes and equipment, and maps/playlists for runners. Omni Hotels (53 properties, US, Mexico and Canada) launched "Get Fit Kits" and "Get Fit Rooms" with features like treadmills. Days Inn (2,000 properties from Africa to Argentina) unveiled their "Dayfit" programming, with improved fitness centers and free healthy breakfasts. Sheraton (400+ global properties) will have its new "Sheraton Fitness" in all hotels by year-end 2013: spanning healthy, lo-cal "Color Your Plate" dining, free workout kits, online fitness classes and redesigned gyms with group exercise. Swissotel (30+ properties from Bangkok to Bodrum) took the wraps off its new "Vitality" healthy eating, business meeting and fitness programs.

DEEPER, MORE APPEALING FITNESS

Hotels will just keep upping the fitness ante, with bigger, more spectacular gyms; more inspiring fitness classes held inside and out; more expert-led, local runs and hikes; more free workout gear, bikes and pedometers; more in-room virtual training; and more partnerships with leading fitness consultancies or gym brands to deliver state-of-the art facilities and classes—and even personal trainers and nutritionists. And with more hotels now sporting such dazzling fitness amenities, and classes worthy of über-trendy urban studios, the buzz is pulling in more locals (and profitable memberships), meaning more hotels are becoming the local wellness hangout.

If the free workout-in-a-bag (variously packed with yoga mats, dumbbell sets, jump-ropes, resistance bands, workout DVDs, running maps, etc.) was catching fire last year, it's now a conflagration. One example: Raffles Praslin in the Seychelles will deliver up all these extras, along with an in-room trainer who leads you through a custom workout.

Many more hotels, like Wyndham's Tryp Hotels (110 across Europe and Central/South America), are offering free workout shoes and clothes, as well as installing sophisticated equipment like elliptical machines into guestrooms. And more hotels are peddling free bikes, like Kimpton's 50+ US boutique properties.

Fitness centers are getting vaster, with distinct areas for cardio, weights, functional fitness and free zones for TRX or kettle bell training. And many more hotels, like The Fours Seasons in Nevis or Omni Hotels, keep gyms open 24/7. Just as more, like Oberoi properties in New Delhi, Mumbai and Dubai, keep their spas open around the clock.

Far more hotels are offering yoga, boot camps and menus of hot, branded fitness classes, at a rate unimaginable just a couple years ago. And they're able to execute these fitness programs either by bringing in local practitioners, or through partnerships with nearby gyms/studios. While free to guests, locals are paying \$25-\$40 a class to get in on all the forward-thinking fitness fun.

Yoga at hotels is getting especially common and creative: from stand-up paddleboard yoga at places like The Tides Inn in Virginia (where non-guests happily pay \$40) and Hawaii's The Fairmont Orchid. Popular aqua-yoga classes rule the pool at The Hotel Wilshire (LA), while Ashtanga yoga with the dolphins makes headlines at The Mirage in Las Vegas. The James Hotel (NYC) proves if you put yoga on a gorgeous rooftop, they will come. Some hotels actually house independent yoga studios, like 889 Yoga & Wellness Spa at Thompson in Toronto, so guests can hit classes anytime, all day. At the Mandarin Oriental in Bangkok an in-house yogi trainer is on call.

More hotels are hooking up with local gyms and studios to offer yoga, Pilates, spinning, you-name-it, classes, just a short stroll away. That's a lot of "bang" for guests with no hotel investment bucks. One example: the Indigo Chelsea (NYC) has linked with indoor cycling studio, Revolve, letting guests redeem free, branded "rides."

Hotels that think "fabulous gym," and then think beyond the gym, to fun classes and outdoor experiences, create a halo of hipness around the property, and it's a smart local market revenue generator. They're turning the lonely, avoided gym routine into a meaningful social activity—and creating more memorable stays.

AIRPORTS – FROM HE**ISH TO HEALTHY

Wellness is now landing at the stressful pre- and post-hotel experience ...the airport. If many airports have become serious mega-luxury-malls, more are now giving travelers what they need far more: rest, relaxation and exercise. Practically every major airport now has a spa, many have gyms, and now airports in places like San Francisco, Chicago and Dallas are rolling out yoga rooms, for pre-flight stress-reduction and stretching. Standout Changi Airport in Singapore has a rooftop swimming pool and Hong Kong's airport has a golf course. Studies show airport food is also getting much healthier. Airlines like Malaysia Airlines and AirAsia offer kid-free-seating zones, so screams don't ruin sleep. More airports are launching affordable (as low as \$10/hour) soundproof



Elements is about-to-launch **EVEN Hotels** that speak to wider 2014 hotel trends: in-room workout spaces and kits, spa showers, and mindful/healthy messaging throughout.

napping pods (with things like Wi-Fi, work spaces, TV, showers, flight information boards that update you on your flight, etc.) from "Snooze at My Space" pods at the New Delhi airport to Snoozecube at Dubai International Airport to Yotel at London's Heathrow and Gatwick airports.

Former WTTC CEO, Jean-Claude Baumgarten, noted at the 2013 Global Spa & Wellness Summit that more travel-time now happens outside the hotel than in, and wondered when we would see "a wellness airline." Even given the airplane space challenges, it's a great question. And we've just heard that Deepak Chopra is working with Qatar Airways on an in-flight wellbeing program. In our "Wellness Travel 2.0" world, one can expect, if not a pure wellness brand, at least a rebrand, coming to all things that fly or swim (cruises) – and all business that touch travelers.



More hotels, like **Four Seasons Punta Mia** in Mexico, have added more expansive gluten-free, vegetarian and paleo menus. And juicing isn't drying up, take Punta Mia's twist: Natural juice snow cones.

MORE WELLNESS SPECIALTY WEEKS

Far more hotels are offering destination-spa-like programming during specialty weeks, often headlined by celebrity trainers and wellness gurus. Fairmont is a standout here, with annual programs like their Singapore hotel's "Full Moon Yoga." Properties like Limelight in Aspen, Colorado are even hosting "glamping" weeks, where guests hike from the hotel into the mountains to camp together.

HEALTHIER, FASTER, CUSTOM FOOD

The trend toward more nutritious, diet-customized, farm-sourced food and beverage at hotels is also heating up. And again, more hotels are making healthy F&B offerings more comprehensive and appealing than just a steel-cut oats option at breakfast.

More hotels have more expansive gluten-free, vegan and vegetarian restaurant menus and room service, and this year more "paleo" options (a whole, unprocessed food diet) are added to the menu mix, at properties like Four Seasons Punta Mia (Mexico) or at the Hyatt in Century City (California).

Juicing is not drying up, it's only more juiced—with more hotels offering blend-your-own juice bars where guests check off desired ingredients from seasonal produce lists. And more properties like Four Seasons Resort Marrakech are offering multi-day, juice-regimen-themed retreats, combining the "cleanses" with daily yoga and nutritional counseling.

Stuffy, eat-too-much hotel restaurants are being

replaced/supplemented by healthy, grab-and-go, in-lobby marketplaces and cafes. And grab-and-go is getting inventive: for instance, at hotels like Les Thermes Marins in Cannes, France it's all about the super-healthy bento box. Another spin on grab-and-go: Marriott is working on a new healthy vending machine concept.

The spa café has been around, but now healthy, light food and juices are becoming more de rigueur than rare at hotel spas. One example: at The Setai Club & Spa (NYC) guests create their own salads and smoothies and can consult with the spa director to design custom meals.

The obsession with farm-to-table, slow, real food (which gets hotel guests farmer's market shopping, gathering in gardens, and cooking) may have been our 2012 trend, but it's grown like weeds. Wellness culinary tourism adventures are especially hot at more hotels, like Aman Resorts (19 luxury hotels from Greece to Vietnam). At Amangalla in Sri Lanka, the chef escorts guests to local markets to select fresh ingredients and then they travel together to a local village to learn how to cook their purchases into clay-pot curries.

SLEEP PROGRAMMING NEVER RESTS

Last year we explained how sleep initiatives at hotels had moved beyond the old "bed wars," to encompass high-tech solutions like total blackout rooms and high-touch ones like sleep-inducing massages. In the past year more hotels have become very serious about the role healthy sleep plays in overall health

(and a happy stay). And a just-released, major medical study⁶ on how insomnia may be the root of much depression, backs up hoteliers' approach.

More hotel brands are rewriting the "turndown," like JW Marriott's "Nightly Refresh" program with nutritionist-engineered, sleep-friendly snacks and aromatherapy at lights out.

More hotels (and their spas) are also offering healthy sleep fitness and treatments. For instance, Park Hyatt Tokyo has a free, instructor-led "Good Night Sleep Stretch" in their fitness studio. Karma Resorts (Bali and Mykonos) have launched the 'Sleep Well Tonight' experience: a morning yoga session followed by a Jade Stone Therapy and evening Soul Reflexology. Six Senses Yai Noi's spa (Thailand) now offers "Deep Dream Massage," followed by a before-bed bath ritual.

Consider how sleep-deep Manhattan's Hotel Benjamin has gone, with their "Rest and Renew" program designed by sleep researcher, Rebecca Robbins. Robbins is the property's official "Sleep Concierge" and her team is trained to deliver proven sleep techniques like progressive muscle relaxation, 24/7. They also have: a menu of pillows designed for whether you're a side, back or stomach sleeper; "power nap" programming like aromatherapy temple treatments; "bedtime bites," special sleep-aiding snacks designed by celeb-chef Geoffrey Zakarian; "work down calls" reminding you

to unplug the pods and hit the sack; and personal sleep consultations with Robbins. This is all in a hotel...not a destination spa.

WELLNESS DESIGN

More hotels will move into down-to-the-hotel-bones wellness, by re-thinking in-room design and "baking in" healthy features like air and water purification, hypoallergenic environments and cutting-edge sleep- and productivity-enhancing lighting. Last year we spotlighted MGM Grand Las Vegas as a first-mover with its "Stay Well" rooms, executed by wellness real estate innovator, Delos Living. These rooms, packed with 18 healthy design features from sleep/wake cycle optimized lighting to anti-bacterial surfaces, have seen an impressive 92 percent occupancy rate, so the original 42 rooms will quadruple to 171 by year-end 2013 – taking over a whole floor. And with Delos Living busy bringing its new "wellness architecture" to private homes (like one just bought by Leonardo di Caprio), office spaces, college dormitories and restaurants, new Delos Living hotel projects seem likely. (In fact, there's a possibility the proposed Miami Beach Convention Center Hotel will be one.)

Other hotels are getting busy devising healthier environments. The environmentally conscious U.S. brand, Adoba Eco Hotels, and the Hyatt Regency Orlando (Florida), have installed Pure Solutions' hypoallergenic PURE rooms, which eliminate nearly



Manhattan's Hotel Benjamin has a standout "Rest and Renew" sleep program, including "sleep concierges," an extensive pillow menu, "power nap" programming, sleep-aiding snacks and personal sleep consultations.



The wellness moves at **Kimpton Hotel's** 60+ boutique properties illustrate new creativity: like their "Car-Free, Carefree" programs that get people exploring cities on foot or by bike (and they even pack healthy lunches for their treks, too).

100% of viruses and bacteria and all surface/airborne irritants. Canyon Suites at the Phoenician (Arizona) has taken many steps to protect allergy sufferers and keep guests healthy: from powerful air purifiers to hypoallergenic bedding and products throughout.

And with recent high-tech lighting advances, that manipulate the blue-white light spectrum to regulate circadian rhythms and moods that got whacked when Thomas Edison invented the traditional light bulb, more hotels and spas (like Miraval in Tucson and all 26 global Six Senses properties) are adopting Lighting Science's new Good Night lighting to improve sleep, and their Awake & Alert LED bulbs in gyms and exercise rooms.

THE FUTURE: FROM WELLNESS GESTURE TO WELLNESS GESTALT

With the spawning workout kits and juice bars, it would be fair for critics to argue there is significant "me-too-ism" on the healthy hotel front. But hotels, we predict, will continue to move from wellness gesture to wellness gestalt, and healthy programming will simply get more meaningful and differentiated to help brands and boutiques stand out in an increasingly crowded healthy pack.

Consider the creative, comprehensive offerings at Kimpton's 60+ U.S. boutique hotels, which include free bikes, workout kits, great gyms, unique yoga classes, fresh juices and healthy food everywhere. But individual properties have surprising, even local,

initiatives like the LA properties' "Car-Free, Carefree" packages that get people exploring that traffic-clogged city by foot or bike (and reward them with discounts off stays if they do). Or consider Klimpton's Ink48 hotel in NYC where a dedicated fitness curator who will get you up and work out with you — or the yoga roll-out service complete with flavored waters, healthy fruit/snacks and staff setting an in-room yoga/Pilates channel for you.

Hotel guests will ultimately decide what's "well-washing"⁷ and what's incredibly winning and welcome. But in some ways it's even hard to believe that "healthy hotels" have to be a trend, and one emerging as late as 2013-2014 — and that these moves towards healthier food and sleep; more engaging, deeper fitness; and overall care for a guest's health, are news for the hospitality industry.

But it *is* news, it will *continue* to be news, and it's ALL great news for leisure and business travelers (whether they're health fanatics or decidedly not).

1 3,352 global respondents, October 2013

2 SRI International, "Spas and the Global Wellness Market," 2010

3 WTTC data, year 2012

4 SRI, "Global Wellness Tourism Economy," October, 2103

5 Expedia's global "Vacation Deprivation" study, 11/2013

6 Four new studies coming from the National Institute of Mental Health. The first from Ryerson University, Toronto, found that 87% of depressive patients that resolved their insomnia saw depressive symptoms significantly decline.

7 A spin on "green-washing" we've heard, describing the marketing world's attempt to apply "wellness" to products and services that are really no such thing.

2

Wired Wellness



Wired Wellness includes "smart clothing," like **Heapsylone's SmartSocks**, coming to stores in 2014.

Wired Wellness



Photos courtesy of Strava

GPS technology and the sensors inherent in smartphones make data tracking while training easier than ever.

For some, even connecting the words “wired and wellness” is counterintuitive, especially as being tethered to cell phones, computers and tablets every waking minute of our lives has created a backlash of its own. But, still, we have become a society that is crazy for data—and putting this data to work can truly make us “well”.

Although there may be a significant amount of hype surrounding digital health apps and devices (including lots of venture capital money), Spafinder Wellness predicts that Wired Wellness has a stunning potential to change the way we both look at and approach our overall wellbeing.

TODAY'S WIRED WELLNESS

We define “Wired Wellness” as any point where digital and wellbeing intersect—from digital devices that track our every move to straight-forward online booking engines that allow you to save a spot at your favorite gym or yoga class or book your next massage to the huge choice of online classes. These examples of digital connectivity that aid our access to wellness is something we’ve come not only to expect but also to demand.

Taking a closer look at online classes, a Google search for online yoga alone serves up over 30 million results.) And the next generation of virtual classes will further change the way we workout and train. LiftSessions (www.liftsessions.com) brings the live trainer experience literally into your home or hotel room so you



Photo courtesy of GetHealth

EMPLOYEE WIRED WELLNESS

Employee wellness programs continue to drive Wired Wellness in 2014. Whether the goal is to significantly reduce health insurance costs, minimize absenteeism or, perhaps most importantly, increase the workforce's wellbeing, employee wellness is setting the agenda around this segment. And, because businesses are actively tracking the results of these programs, they have realized early on that without a motivational or social aspect driving the use of these devices, people are less likely to embrace them.

So companies have started integrating team play and social sharing into wellness programs and have seen results and participation soar.

As Chris Rooney from employee wellness start-up GetHealth says: "An app won't change how someone exercises or eats on its own; it has to be tied into a number of different mediums—from medical doctors to health insurance providers to physical trainers and even a user's social group."¹

However, as with mHealth, privacy concerns in workplace wellness also shouldn't be minimized. Questions like: Who will have access to all of this data? Should employers (or their insurance companies) be able to monitor whether or not we've walked to work or had a croissant for breakfast versus a piece of fruit? In order for the next phase of Wired Wellness to take shape, we will be seeing a sharp focus on the control of this data.

GetHealth recognizes that to win the employee wellness race, its apps have to engage users at many levels—not simply tracking the steps they walk or calories they intake.

will never be able to skip a work out again. Founded by Chris Blyth, who's worked in some of the most prestigious gyms in the world, LiftSessions promises to be a useful tool for personal trainers and gym management to help with tracking performance and scheduling sessions.

Of course, we can't talk about what's happening in Wired Wellness today without looking at the ubiquitous health and fitness tracking devices and apps on the market. It may have started with Polar heart monitors in the 1980s but today's devices, from companies like Jawbone, Nike and FitBit, take our need for data to another level, delivering a plethora of information on the number of steps we walk, miles we run, calories we burn and even the quality of our sleep.

Fueled by our need to track data (a trend dubbed "Quantified Self," meaning self knowledge through numbers), these trendy tracking devices are selling in droves—with total sales projected at 252 million units by 2017.² Something to think about: that number is four times the population of the United Kingdom and about 50 million shy of the entire population of the US.

With sales volumes like this, you might expect us to say that these trackers mark the pinnacle of Wired Wellness, but we think they are only a stepping stone to some of the next big things, and, potentially, might even lead to a backlash in consumer digital health monitoring. Because, unlike a virtual yoga class or online booking, wearing, fiddling and dealing with the data these apps and trackers deliver us is not always easy and can often be stressful (the opposite of wellness). And, like any new toy or hobby, using them may be fun at first, but the potential for boredom

and frustration in learning that we're not achieving our targets could relegate them to the bottom of the gym bag.

Another source of digital and data fatigue could come from the huge number of mobile apps in this space—there are now close to 100,000 mobile health apps in 62 app stores.³

Spafinder Wellness predicts that the survivors in this race will be the apps that rise above basic data capturing and, instead, are able to capture the imagination and commitment of their users. We believe the game changer will be twofold: making the data capture more streamlined and teaming that data with both your social peer group (think: your exercise buddies) and/or expert advice (physicians, nurses, personal trainers). Both these groups have the ability to keep us engaged and to help us take action to change our behavior to have a positive impact on our overall health.

UNTIE THE BANDS THAT BIND US

One of the big trends in Wired Wellness for 2014 will be a move away from the wristbands that bind us. An obvious example is using the GPS technology and sensors that exist in the device you already carry—your smart phones.

Making data capture easier is the goal of ProtoGeo's Moves. As long as you have your smartphone with you, Moves logs the time spent walking, cycling or running—no straps to fiddle with and no need to upload data. At less than US\$3, compared to \$100s for the FitBit or Nike FuelBand, it is easy to see tracking reaching the masses much more easily.

Taking this to whole other level is Strava; its Strava Run and Strava Bike apps are slick examples of tracking technology alongside a huge amount of "friendly competition" to keep users motivated. For example, if you often run the same route, now you can compete against yourself or compete against the "friends" you follow. Strava has also incorporated virtual clubs to join and offers up challenges with rewards to keep users motivated. This example of "social fitness" is something that Spafinder Wellness predicts will endure just as running clubs of yore were successful. It's a concept that works the way humans work.



Photos courtesy of Strava

Strava understands "friendly competition" keeps people motivated and engaged, letting them compare their training against real and virtual friends.

JUST WEAR IT

More cutting edge will be the smart clothing coming to a store near you. The creators of "clothing apps" are already looking way beyond the "data box" and into developing uses that can affect a change in behavior. For example, Heapsylone's SmartSock not only tracks how much you run but also the way you run. Its sensors can measure pressure to your foot, and this data can help you improve your running style to minimize injuries. Just as importantly, it could be a boon to the physical therapist and podiatrist looking to assess a patient's foot and how to treat it.

Another breakthrough is the FitnessSHIRT manufactured by the German-based Fraunhofer Institute, which has the first generation of truly "wearable" trackers that users won't have to strap on. The shirt is outfitted with tiny electrodes that measure physiological signals like breathing, pulse and changes in heart rate and then transfer that data via radio link to a smartphone or computer, where it can be analyzed not only by you but also by your personal trainer. But the manufacturers are thinking

far beyond tracking for personal use and looking at using the shirt technology for firefighting and rescue teams, who put their health—and frequently their lives—at risk. With continuous monitoring of cardiac and respiratory functions, this could be an early warning system that saves lives. This is Wired Wellness that matters.

Taking this concept to sci-fi levels is the move from wearable to digestible tracking. Though it sounds like future-speak, there's already an FDA-approved ePill that can be swallowed to track the medications people are taking and how they are affecting the body. This data is then sent to a smartphone for analyzing. Why is this so significant? Its first application is as an aid in clinical medical trials to improve what pharmaceutical companies know about the efficacy of the drugs they are developing. One of the biggest issues in patient trials is the people who do not take their drugs as prescribed, which can seriously undermine the statistical analysis of trials. Because The Proteus system is designed to deliver precise information about medication ingestion, dose timing and associated physiologic response of patients, including heart rate, activity, rest, and skin temperature, pharmaceutical companies will no longer rely on human input for this important data, and, with investors like Oracle, you can expect some interesting applications to come from Proteus Digital Health's Ingestible Sensor in the future.

REMOTE PATIENT MONITORING

This brings us to another important aspect of Wired Wellness 2014. There will be a much greater focus on patient monitoring, fueled by numerous factors including our aging population, unprecedented growth in chronic diseases, the high cost of on-going medical care and, crucially, the increased network speeds available with 3G and 4G.

The concepts make a lot of sense: give patients more responsibility for their own health management from the comfort of their own home, while allowing them to communicate with their healthcare providers. Dubbed mHealth (mobile health) this emerging market promises to grow 40 percent over each of the next five years to reach US\$10.2 billion in 2018.⁴

A simple example comes from Intelligent Living's new electronic Pillbox app. As noted, many patients may not take their medications as indicated, which can result in life-threatening issues. This app tackles this issue by alerting users to take their medications and notifying care givers about medicine, vitamin and supplement consumption.

Diabetes is an obvious example of the need for mHealth. According to the American Diabetes Association, the cost of diabetes care in the U.S. grew to \$245 billion last year. With more than 11 percent of the US population alone classified as diabetic, mHealth developers have a very specific and very important market.

The Finnish-designed device, Mendor Discreet, is an all-in-one monitoring device that enables diabetics to check their blood glucose levels quickly and discreetly. It looks like a smartphone and can test insulin levels in less than 20 seconds. The device has won fans in the EU who are facing laws that require testing of glucose levels every hour when flying a plane; solo flyers simply couldn't check it with standard devices.

Agile Health is taking a more simplistic approach to changing diabetes patients' behavior with myAgileLife, a text messaging-based program that sends targeted, personal and educational text messages to change behavior. The product has already undergone a successful trial at the University of Southern California.

"Our focus is really around behavior change," said Gary Slagle, CEO of Agile Health. "It's about getting inside someone's head."

Clearly, this segment of Wired Wellness has far reaching implications—some of them surprising. For example, the Louisiana Department of Corrections is funding telemedicine for its inmates, allowing patients a new level of access to doctors that eliminates the costly transportation and security around usual inmate treatments.

Another fascinating example is being led by Muhammad Yunus, the Nobel Peace Prize Laureate responsible for many innovative programs benefiting the rural poor. His Grameen Movement is looking at the issue of risky pregnancies in Bangladesh where many women hide their pregnancies and don't know



Photo courtesy of Smiling Mind

WIRED WELLNESS GOES MENTAL

Until now, most everything in Wired Wellness has focused on the body and our physical needs. We can track data on how we run, how many steps we take, our heart rates, the calories we burn. And the emerging mHealth apps are working primarily on keeping our bodies healthy.

A big part of 2014 will focus on keeping our minds healthy. A quick look at some of the meditation apps that are now available:

- HeadSpace (www.getsomeheadspace.com): Dubs itself "the first gym for the mind", a free version will help people kick start their meditation practice
- The Mindfulness App (www.mindfulness-app.com): Helps users keep meditation on track through alerts based on time or even location. For example, if you enter your favorite green space you can be prompted to practice.
- Smiling Mind (<http://smilingmind.com.au>): Targeting young people and designed to make meditation fun and easy (pictured above)
- Mindful Meditation (www.mentalworkout.com/store/programs/mindfulness-meditation/): Designed by meditation teacher and psychotherapist Stephan Bodian, provides guided meditations for both beginners and more experienced mindfulness practitioners
- Walking Meditation (www.meditationoasis.com): If you like to combine your meditation with fitness and nature, this app's guided walking tours could be ideal

if their unborn child could be in danger. Working with Intel, the plan is to develop an ultrasound app that enables women with smartphones to conduct their own tests and send the results to a doctor for private consultation. An application like this could reduce costs and improve OB/GYN care in any country.

The pain point with mHealth is issues arising around privacy and security concerns. Patients will have to be assured that their confidential data is protected—a concern that is being taken seriously by medical professionals and governments the world over. But motivation, in terms of both cost and life savings, to build a system that is workable is huge.

WHAT LIES AHEAD

Clearly, Wired Wellness has a very significant role to play in keeping us healthy and even in lowering the spiraling costs of healthcare. And spas of every type as well as fitness and wellness providers should be playing close attention to this sector to see where some of these new technologies can fit with their businesses. It would be easy to see a spa outfitting every guest with smart clothing to monitor how they are reacting to a class or workout or working closely with LiftSessions to better monetize personal trainers and fitness instructors on staff by setting up long term training plans for after guests leave the spa.

In fact, we can foresee a time when spa and wellness professionals become wellness technology or app coaches, helping people choose the best app for their needs and making wired wellness a reality 365 days a year.

There are a lot of choices, and a lot of confusion, but Wired Wellness has a huge role to play in helping people around the world be healthier—and it is a tremendous opportunity for the wellness industry.

1 A survey conducted by Ireland-based GetHealth found that the barriers to success in most Wellness Programs is Engagement – hence their development of employee wellness tools that engage users with a social and community-based features.

2 According to a new report entitled "The World Market for Sports & Fitness Monitors" from IMS Research

3 According to Research2Guidance

4 Transparency Market Research

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Hot Springs Heat Up

The Banjaran Hotsprings Retreat in Perak, Malaysia sits nestled between 280 million-year Paleozoic limestone hills.



Photo courtesy of The Banjaran Hotsprings Retreat

Hot Springs Heat Up



Photo courtesy of The Banjaran Hotsprings Retreat

Geothermal hot springs at **The Banjaran** in Perak, Malaysia feature dipping pools full of hot water that billows up from the ground below at the rate of three million liters per day.

Bathing in hot springs may be the oldest "spa" experience in the world—dating further back than Roman times—but they are also incredibly on trend in 2014. In fact, there's never been a hotter moment for thermal springs with more and more people seeking out this affordable, social and beneficial spa experience. And, with hot springs existing in virtually every corner of the world, governments and developers alike have taken notice and are funding hundreds of new, exciting developments.

DOES A BODY GOOD

Hot springs are geo-thermally warmed waters bubbling up from the earth's core, delivering minerals that are said to improve certain skin conditions and relieve pain from arthritis and other musculoskeletal ailments. Before modern medicine, the positive medicinal benefits of bathing in mineral springs were the stuff of legend. Although not scientifically proven at the time, the effect of the heat, the minerals, along with the social aspect of communal bathing and the hygiene that resulted, combined to make almost miraculous results. Even fertility was seemingly cured—in the 1700s, Queen Mary "took the waters" at the thermal springs in Bath, England while suffering from infertility and 10 months later gave birth to her son!

Unlike in the days of ancient bathers, we now have the benefit of clinical evidence to prove that "taking the waters" not only feels fantastic but also does our bodies good. Many countries have embarked on studies to prove the benefits of their waters, and a noteworthy piece of research comes out of Italy (arguably early



Photo courtesy of Six Senses Spa

At the **Evasion Ma'In Hot Springs & Six Senses Spa**, natural hot spring waterfalls cascade into the spa pool and relaxation area. The spa is located in Jordan.

pioneers in the appreciation of hot springs). The comprehensive NAIADE study looked at data from over 23,000 spa goers in 297 spa centers and found a major reduction in hospitalizations, sick days off work and pharmacological drug use.

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When His Holiness the Dala Lama, keynote speaker at the GSWS, was asked if he had ever experienced soaking in a hot spring, he answered, "Yes, in Northern India," and then, in his trademarked way of summing things up in small clear nuggets, added, "It felt really good."

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During the recent Global Hot Springs Forum, which took place at the 2013 Global Spa and Wellness Summit (GSWS) in New Delhi, India, another sure sign of the importance of this spa modality, the audience was presented with a holistic look at some of the major studies¹ on balneotherapy (defined as the practice of soaking in thermal mineral waters that contain at least one gram per liter of minerals). The results showed

100 percent positive outcomes for pain improvement and quality of life. The Bender report concluded, "that balneotherapy with Hungarian thermal water is an effective remedy for lower back pain, as well as knee and hand osteoarthritis."

FUELING THIS HOT TREND

The reasons hot springs are so hot, hot, hot at the moment are bountiful. Current travel, economic, social and medical trends have converged to make this the perfect time for the development of hot spring destinations around the world.

- Hot springs offer authentic/local travel experiences (hot springs, no matter where they are located, are by their nature incredibly unique and local—even down to the different mineral properties of the waters).
- Similarly, hot springs inherent sustainability keeps them very on trend with both locals and travelers alike.
- Culturally, there has been a marked rise in people seeking out social experiences, and hot springs are great places to relax and connect with friends and family alike.
- Economically and medically, "taking the waters" is a uniquely affordable (many hot spring experiences can be had for a relatively modest day rate), yet hugely stress-relieving activity. And when managed and maintained properly, hot springs can be a very lucrative business.

HEATING UP: SPA TOURISM

This is all good news for the travel and tourism industries: "The rub-off business associated with hot springs is staggering," observes Cary Collier, principal, Blu Spas, Inc.

And the amazing fact is: there are hot springs on every continent and virtually every country around the world.

The number of hot springs and the economic value these destinations bring to nearby communities is only just beginning to be calculated. While efforts to define and track the number of hot springs and their economic value has taken place at the regional level, we have yet to have a global view. One estimate comes from Charles Davidson, an expert in hot springs and founder of Peninsula Hot Springs in Australia, who estimated the global hot springs market size in 2011 (based on statistics from Japan, China and Europe) to be a whooping US\$50.4 billion; that number is not far off the 2010 estimated global spa market of US\$60.3 billion.

Broadly speaking, there are three main cultural approaches to the use of hot springs: relaxation and connection with the natural environment (Asia); medical/health based treatments (Europe) and spiritual and religious connections (India and indigenous cultures). The globalization in the hot springs industry means a blurring in these distinctions. Of interest, however, is that in past centuries hot springs evolved into a health-focused activity wherever they existed.

HOT SPRINGS MAKE A GLOBAL IMPACT

The number of new developments and major refurbishments of traditional hot springs around the globe illustrates the intense interest in this segment, and the diversity of these projects (from affordable day spa experiences to the ultimate in luxury) shows that hot springs will continue to deliver for the spa and wellness industry.

OLD BECOMES NEW

Italy, England, France, Bulgaria, Hungary, the Czech Republic, Germany, Switzerland and Austria all have historic towns that have a thermal spa that are hubs of social and economic importance. Illustrating the renewed interest in hot springs in Europe, a recent Hungarian study² showed a 7.7 percent growth in tourists visiting a mineral spring spa versus the average 3.4 percent tourism growth seen in the country. Most of the exciting developments in Europe are coming from these traditional spa towns.

The Gainsborough Bath Spa (Bath, UK) promises to be the only 5-star hotel in the UK with direct access to natural thermal waters (conversely, the famous Thermae Bath Spa is an affordable day spa). Opening Spring 2014, the master suites in every room will have in-room thermal baths, and guests will be treated to daily massages. There's even a private a 17th-century annex comprised of 14 guest rooms, ideal for large families and bridal parties.



There are over 3,000 naturally occurring hot springs in Japan, representing the largest sector of the domestic tourism industry. **Hoshino Resorts Co., Ltd** in Hakone, Japan is transforming its traditional onsens into luxurious resorts.

Tauern Spa Zell am See - Kaprun
is one of a handful of new, family-friendly hot springs properties located in the Austrian Alps.



Photo courtesy of Tauern spa Zell am See - Kaprun

A lesser-known UK spa town, Buxton, is also getting a huge renovation. The Buxton Crescent & Thermal Spa is undergoing a €32 million transformation which will result in a 79 bedroom, 5-star spa hotel incorporating natural baths. This should be to the benefit to the local University of Derby where they run a world-famous spa management program.

Leukerbad, a spa town in the Swiss Alps that dates back to 200AD, boasts the opening of 51° Spa Residences in 2015. Designed by renowned architecture firm, Michael Graves & Associates, this is the first spa residence to offer private in-home access to the thermal waters of the local springs, which are 51 degrees.

Austria also boasts recent builds of hotels based around hot springs and the alps such as the picturesque Aqua Dome near Tirol and the family-friendly Tauern Spa near Kaprun.

NEW AND IMPROVED

Hot springs in Japan are big in every way and represent the single largest sector of the domestic tourism industry: over 120 million visitors frequent the more than 3,000 naturally occurring springs each year. For more than 2,000 years, the Japanese have soothed their bodies and souls at traditional onsens, a bathhouse centered around various hot springs. This tradition continues to this day but there is also a revolution happening to make the onsen more relevant to a younger, hipper demographic. Hoshino Resorts is taking the lead by transforming its traditional

onsens into luxurious resorts, augmenting the hot springs with additional wellness treatments, including weight loss regimens and even stress management and mental wellness.

In 2012 hot springs became one of China's ten pillars of focus for the national tourism organization alongside hotels, transport, souvenirs and scenic spots—illustrating the huge importance of this segment. Undeniably, in China, people like everything bigger and better. Mission Hills Resort, located within the volcanic region of exotic Hainan Island, has the biggest spa in the world at 88,000 square meters, including a whooping 168 pools (the resort also has the largest collection of golf courses in one development—19!). And, keeping with the bigger is better theme, the resort has over 3,500 guests a day. However, the truly spectacular feature of this spa is something the Chinese aren't often credited with: the entire resort is sustainable.

Currently in development is what is sure to be a great escape from the hustle and bustle of Beijing. Situated on over 100,000 square meters of lush landscaping surroundings, the GOCO Retreat, Niutuo, will emphasize the benefits of the natural hot springs and also offer a holistic program that includes wellness and meditation. Niutuo is children-friendly so that families can enjoy a healthy vacation together.

Other new properties in China include luxury properties from two international spa developers, Banyan Tree and Six Senses. The Banyan Tree Chongqing Beibei opened to guests in the summer

of 2013, and each of its 107 suites and villas features private hot spring pools so guests can enjoy the water's healing benefits in privacy and comfort. Six Senses Ninghai is currently in development and will feature 129 villas, some of which will be offered for sale.

Another notable Six Senses Spa is the Evason Ma'In Hot Springs in Jordan where a hot spring waterfall cascades into the spa area against the dramatic desert landscape backdrop.

Kuala Lumpur, Malaysia also features a new luxury hot springs retreat, the Banjaran Hotsprings Retreat, which is found two hours outside the capital nestled in a 16.59-acre valley and surrounded by 280 million-year old towering Paleozoic limestone hills.

In Turkey, traditional 14th century bath houses, like the Keceli Hamam and Cekirge Hamam in Bursa are undergoing renovations and seeing resurgence. And in New Zealand, plans are underway for a second hot spring site operated by the Moari tribe, which will be developed in Queenstown and expects to attract 300,000 customers annually.

GREEN ENERGY AND SPAS

In the Philippines, Constellation Energy Corp. (CEC) will develop lakeshore areas near its 20-megawatt geothermal power project in Oriental Mindoro into a hot spring and wellness center. The project in Naujan Lake, Oriental Mindoro will aim to showcase a healthy mix of green energy and green tourism. CEC chair, Jose Leviste Jr., said: "Green energy is the way to go.

Power, tourism and health rejuvenation can mix. This is possible with renewable power energy."

A similar development comes from African green-energy company KenGen, which plans to open a geothermal day spa at its Olkaria plant, adjoining Hells Gate National Park in Kenya. The spa will feature several open-air lagoons with water temperatures up to 40 degrees celsius, as well as steamrooms and saunas.

"TRENDY" REPLACES "FUNKY" IN USA

"Many hot springs locations in the US can be categorized as 'funky' at best," says Cary Collier, Blu Spa Inc. "But there are a huge number of renovations going on and a surprising number of 'new frontier' opportunities in the US – it's an exciting time for hot springs development."

One such new development from Blu Spa Inc. is taking place in Montana's Yellowstone Park. Royal Teton Ranch Hot Springs, located by the Yellowstone River in Paradise Valley, is set to open in the summer 2015. The site will fit in with Yellowstone's camping aesthetic, including a renovated luxury RV park and camping site, restaurant and rustic cabins. The key feature will be an assortment of pools featuring geothermal water from the Yellowstone basin and, in keeping with the spirit of sustainability, the water will then be returned to the Yellowstone River. The spa will also feature lounges and nooks, private spa and



Two Bunch Palms in Desert Hot Springs, CA is one of many hot spring hotels in the Coachella Valley undergoing refurbishments and updates.



Photo courtesy of Hoshino Resorts

Hoshino Resorts
(Hakone, Japan) is augmenting its hot springs with additional wellness treatments, including weight loss and stress management. The company opened its first hot springs resort in 1914.

pool cabins, a fitness center and treatment rooms, as well as mountain-style sauna and steam rooms, water bars, fire pits and lots of outdoor play.

In California, which is swathed with hot springs from north to south, a huge resurgence is underway. A prime example is the current re-fit of the Hollywood hangout, Two Bunch Palms in Desert Hot Springs, which is being refurbished under the watchful eye of spa industry heavyweight CEO Kevin Kelly. In fact, this well-known haunt, featured in movies like "The Player," is only one of the many hot springs establishments in the Coachella Valley (a mecca of hot spring hotels/motels) that are undergoing updates. The crystal clear spring waters of this location are known for their rich lithium content, which is considered to be a natural mood stabilizer—the perfect antidote to the stressful LA lifestyle.

Another well-known spa, Homestead Resort in Hot Springs, VA, has updated its famous spa facilities with the help of Aquavana. The waters, which are said to have been used by humans for more than 9,000 years, are famously known for President Thomas Jefferson's regular visits. (He praised the waters for their help with his rheumatism.)

THE FUTURE IS HOT

Renewed interest in hot springs bathing worldwide will continue to attract entirely new markets to these "fountains of youth" and we can expect greater participation from those who are already devotees.

Recognition of the influence of hot springs on locally economies, as well as the hugely positive affects this generally affordable pastime has on its visitors means that we will continue to see investment in hot spring developments. And as this market becomes less regional and more global in nature, the spa and wellness industry can look forward to benefiting from extensive knowledge sharing and improving development based on these learnings.

Hot springs are the sweet spot (or shall we say hot spot) for the spa industry.

1 Bender (2013) and Falagas (2009)

2 International Wellness & Spa Tourism Monitor, 2013

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Suspending Gravity

At **Fairmont Scottsdale's Well&Being Spa**, aerial yoga classes are so popular with both guests and locals they just keep adding more.



Photo courtesy of Fairmont Scottsdale

Suspending Gravity



Photo courtesy of Nordik Spa-Nature

More spas are breaking the saltwater flotation experience out of the usual "pod" and adding new flotation pools.

Nordik Spa-Nature in Quebec, Canada, offers a weightless Källa treatment, which takes place in the only indoor flotation pool in Canada.

Something's in the air...something's floating out there.

People have a deepening psychological and physical desire to escape from gravity's relentless pull, and a distinct "suspending gravity" or "floating" trend is rising up. . We're seeing more weightless, stress- and mind-melting flotation tanks, chambers and pools at spas. On the fitness front: a global craze for aerial and anti-gravity classes and yoga, and new equipment like anti-gravity treadmills. And more spas are incorporating new technologies like anti-gravity massage beds and futuristic pods that simulate the experience of floating on a cloud.

There's also a new obsession with in- or on-water flotation experiences and fitness: from classes like aqua-spinning or stand-up paddleboard to new spa properties that actually float. .And some downright space-age innovations include a planned Space Resort (Barcelona) where spa-goers will experience the world's first "zero-gravity" spa.

FUELING THE TREND

Gravity's Heavy Toll

No other force impacts our bodies so radically, and while you can't see gravity, you can witness its cumulative damage, and downward drag, on your face, neck, back, chest, organs and feet, as you age. Gravity compresses our spine/discs, so we lose an average of ½-inch in height every 20 years, the culprit behind backaches, swollen feet and varicose veins, and it compresses our organs so they function less well.

Flotation's Medical Benefits

Studies¹ performed in the U.S. and Sweden indicate flotation therapy (tested in tanks) delivers wide-ranging benefits: significant reductions in stress, chronic pain, swelling, headaches, depression and insomnia while lowering blood pressure and improving skin. Several studies² show ongoing flotation chamber sessions can positively "reset" stress response hormones like cortisol, ACTH and epinephrine—and much of the research concurs that these positive effects last months after "floats." Studies on flotation's brain impact showed it improved creativity in jazz musicians and boosted focus in academic examinations.³

Fitness approaches (whether aerial yoga, anti-gravity treadmills or in-water workouts) that "unweight" the body from gravity's pull can prevent more injuries, and the wear-and-tear on joints, tendons and muscles, than the earth-bound equivalents.

Given our info-bombarded lifestyles, people are increasingly seeking new experiences that "wipe clean" their brains, and mind-body approaches that might have seemed extreme a few years ago are becoming mainstream. If '70s hippies were the first to embrace flotation chambers, now spas report that it's executives at tech start-ups who are climbing in.

FLOTATION TANKS/ROOMS RESURGING

When you think weightless, saltwater flotation therapy, you don't usually think of Benjamin Franklin! (Although his diary captures his astonishment at the profound relaxation delivered.) One is more likely to associate early flotation tanks with the 1980 film "Altered States," based on neuro-psychiatrist John C Lilly's well-publicized sensory-depriving, isolation-flotation tank experiments in the 1950s and 1960s, which, while pioneering, took an odd turn, often involving psychedelic drugs. In the late 70s, University of British Columbia psychology professors, Peter Suedfeld and Roderick Borrie, began re-investigating flotation tank benefits, rebranding it REST ("restricted environment stimulation technique"), or "floating," to get away from the cultish, "mind-control" Lilly era.

In the 1980s the *New York Times*⁴ reported the market was developing (Robin Williams and Yoko

Ono were early, private "flotation pod" owners), but until recently, most commercial "float centers" remained rather bare-bones businesses. Now, major media like the *Wall Street Journal*⁵ report a bigger, new wave of flotation tanks/rooms underway, with celebrities like Fear Factor host Joe Rogan, now on the pulpit, and stress-reduction and brain performance companies seeking corporate executives as core customers. Evidence is mounting that flotation therapy is not only growing, it's growing up. More sophisticated, suave float-focused facilities are opening worldwide, and some of the most cutting-edge resort spas are now incorporating luxe flotation rooms and pools on their dense menus of relaxation treatments. Portland, Oregon even recently announced an annual research-focused Float Conference.⁶

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"I went to bathe in Martin's saltwater hotbath, and floating on my back, fell asleep, and slept near an hour without sinking or turning over. I never before, and should have hardly thought it possible."⁷

— Benjamin Franklin

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How It Works (Now)

In most flotation therapy (tanks, rooms, pools) the water and air temperature is kept at a skin-neutral 93.5 degrees and the water/salt ratio is about 75/25, to create gravity-eliminating buoyancy so that the line between body/skin and water is erased. In classic REST pods, sense impressions are blocked: it's pitch black and ears are below water. Other chambers available now allow floaters to stand inside, and have low, ambient lighting. Floating can be passive and relaxation focused, or can be performed with guided meditation or other education; the idea is that when the body is completely relaxed, the mind opens up.

Sessions typically last between one and one and one-half hours; during the session experts say brainwaves move from alpha or beta to theta, that liminal, fertile "brain moment" time just before sleep (and again at waking).

Floater report this body-resting, brain-clearing therapy often results in powerful introspection and epiphanies, bursts of creativity and problem solving, and even out-of-body experiences. Not to mention relaxation.

Where to Float

There are hundreds of float-focused centers in dozens of countries, from China to Canada. It has been more popular in Europe (Sweden has been dubbed its capitol, with 120+), but the world is catching up. Floating is growing fast in tech-driven metropolises: California's Bay Area now has ten+ centers. Portland, Oregon's Float On reports they book a thousand floats a month. From Oakland, California's FLOAT, to

the spa at the Intercontinental in London, flotation chambers can now be experienced at more—and more inviting—locations.

And some of the most sophisticated (and new) spa resorts are putting unique spins on float therapy. Amangiri's Aman Spa (Utah, U.S.) has a vast flotation chamber built into a canyon cave, packed with Dead Sea salts and combining color therapy. Six Senses Spa at Alpina Gstaad (Switzerland) offers flotation along with sensory pods and a salt grotto. Brazil's new, award-winning eco-spa resort, Botanique Hotel & Spa, includes a floating chamber. And Switzerland's mod Backstage Hotel Vernissage's spa tells earth's creation story via seven treatment "cubes," and Day 5 is a flotation chamber with whale sounds under water and birds above.

MORE FLOTATION POOLS AT SPAS

And more spas are taking the salt-dense flotation experience out of the "pod," rolling out new weightless pools. At Jumeirah Emirates Towers Hotel's Talise Spa the Dead Sea flotation experience is available in metro Dubai. Nordik Nature Spas' weightless Källa treatment takes place in the only indoor flotation pool in Canada. Nirvana Spa (Berkshire, UK) just opened a Celestial Floatation Pool, with 60 tons of Dead Sea salts. At Aire Ancient Baths, where ancient Roman bathing meets Lower Manhattan, you drift in the turquoise "floatarium" lit by hundreds of candles, listening to a flamenco flutist.

AERIAL YOGA & FITNESS ASCENDING

Exercise does a body good, but all the gravity-bound running, weightlifting, dance classes and yoga take their toll because of compression fatigue. We know that increasing gravity's force in workouts in bodyweight/resistance training models like TRX Suspension Trainer™ or GTS® (Gravity Training System) has been a hot trend. But now some of the

Aerial yoga, where you're suspended from the ceiling by silk fabrics to soar, stretch and float through the air, is soaring at fitness studios and spas worldwide — like at **Miraval Resort & Spa** in Tucson, Arizona.

red-hottest fitness classes (whether aerial yoga or aqua-fitness) attempt to cut—or loosen—the gravity cord by “suspending” people in air or water.

Aerial yoga, which began ascending in NYC about seven years ago, is now soaring globally and is on offer at many more yoga/fitness studios, from New Jersey to New Zealand. And it takes many forms including anti-gravity yoga, suspension yoga, upside-down yoga, “cloud swing,” flyoga, etc.

The general principle: suspending people from the ceiling by silk fabrics tied together to make a cocooning hammock. Hung at varying heights, they enable various yoga positions, allowing people to soar, stretch and float through the air, and with “inversions,” hang loose upside-down. Instructors report that because a person is supported (with no weight on head or neck), it allows a greater range of motion, longer-held, more controlled positions and deeper stretching. Additionally, space in the back’s vertebra open up, and it prevents and relieves back injury/pain.

In almost every major city several studios now offer Ariel Yoga from OM yoga in NYC, to Yogateau in Paris, to Studio Crane in Japan, to Defy Gravity in Miami, to Bodywize in Hong Kong, to Shine Alternative Fitness in Las Vegas, which was started by Cirque du Soleil performers. London’s Flying Fantastic seems to teach

aerial everything and offers yoga, Pilates and hoops. AcroYoga, which involves two partners (a “base” and a “flyer”) is taught at global Equinox gyms. More gyms like NYC’s Asphalt Green teach broader Anti-Gravity Fitness, using aerial apparatuses in circuit-type workouts, more accessible aerial excitement for the non-yoga-doer.

More hotel/resort spas will increasingly jump in, like the Meridian Spa in Eppendorf, Germany and the Fairmont Scottsdale’s innovative Well&Being Spa, which reports that classes are so hot with guests and locals, they have to keep adding more.

ANTI-GRAVITY FITNESS EQUIPMENT

More anti-gravity treadmills are hitting more gyms and spas. Standout brand AlterG, touting NASA-based anti-gravity technology, uses differential air pressure to lift up 80 percent of a person’s bodyweight, so “they can find where the pain stops and natural movement feels good again.” Superstar athletes like Kobe Bryant are popularizing them as a breakthrough solution for avoiding and recovering from injuries.

A recent, interesting article⁸ from Best Gym Equipment and the Daily Star analyzed what fitness centers of the future might look like, forecasting the logical progression from anti-gravity treadmills to anti-



Anti-gravity treadmills, like **AlterG's**, use NASA-based technology to lift up (to) 80% of a person's body weight to help people avoid/recover from injuries — and “float” through the workout grind.

gravity rooms. Imagine doing 100 percent-weightless yoga and Pilates and the benefits of cardiovascular workouts with near-zero impact on joints, tendons and muscles... plus the boon to marathon runners and older people.

THE IN- AND ON-WATER WORKOUT SPLASH

The Archimedes Principle informs us that the fastest way to counteract gravity is to get into water, because as water pushes up, gravity's downward drag is reversed. So, naturally, a key sub-trend within all the gravity-fighting-fitness is many new breeds of in-water workouts. Suddenly the buzzed-about fitness craze (spinning, Zumba) is diving into the pool. Like aerial fitness, water workouts forestall damage to joints/muscles, but because water provides 12-14 times more resistance than land-based exercise, it uniquely builds strength and drives weight loss, according to Stockholm University College of Physical Education.

Aqua spinning is especially hot (if far less sweaty and loud than the ubiquitous spinning classes.) A French export, proponents say that submerged biking feels weightless and attacks a whole different set of muscles: the abs/core. From Le Kaila in France to just-launched, classes at NYC's Aqua Studio or London's spa at Dolphin Square, you can be assured more in-water-spinning is headed to more hotels, spas and gyms in 2014.

More resort/hotel spas are also offering the float-on-water trend of stand-up paddle boarding (SUP), whether at the pool or a nearby lake or ocean. An accessible alternative to surfing, poster girls like Jennifer Aniston and Cameron Diaz illustrate that it's a great body toner. More spa resorts like Raffles Praslin Seychelles are getting guests out SUP-ing, and of course it's getting the requisite fitness fusion shake-up: now paddle board yoga is taking off at places like Paresa Resort in Phuket, Thailand.

From the just-launched Aquapole Fitness classes at Aspria Arts-Loi in Brussels, to aqua aichi at the just-opening VANA in India, more "floating fitness" is going to keep bubbling up at more spas.

GRAVITY-SUSPENDING SPA AMENITIES

From the simple to the futuristic, more spas are incorporating more amenities/equipment that deliver zero gravity or "floating" experiences. Some simpler executions: more spas stringing up hanging/swinging baskets, cocoons and hammocks up in the trees to give guests private, cool places to relax and sleep or letting people "fly" at more property trampolines.

Massage/treatment beds and chairs, like Gharieni's MLX Wellness Bed and Yelo's anti-gravity sleep pods are re-engineered to enable zero-gravity positions, which is the body's natural resting position and helps blood flow to the body and heart.

And Kohler's Waters Spas (US, UK) now offer WaveMotion Body treatments, 3D movement to create a feeling of weightlessness.

The futuristic: More spas are including multi-sensory, high-tech "pods" aiming to deliver various out-of-this-world experiences. Consider the Wolke 7 Cloud 9 from spa supplier KLAFS and Viennese artist SHA hitting brand-new spas like Velaa Private Island's Spa My Blend by Clarins in the Maldives. Designed expressly to simulate the feeling of floating weightlessly on a cloud, you burrow into a cloud-shaped, womb-like cocoon, which rocks gently like a cradle, and are enveloped in a "multidimensional sound cloud" and CloudSky visuals.

FLOATING SPAS (AND HOTELS)

And more spas that actually float will appear, often on lakes, rivers and ports near cities: like Bota Bota Spa-Sur-L'Eau inhabiting a recycled barge in Montreal's old port. One eco-extraordinary example is coming in 2014: Floating Gardens set for a lake near Amsterdam. Built with recycled polystyrene trash, and coated in vegetation so it breathes oxygen, it will offer equally cutting-edge treatments focused on psychoneuroimmunology (PNI) and neuroplasticity (how mind and health interweave). Another ice-crystal-shaped, floating eco-spa-hotel Krystall is planned for Norway and spas are even being designed for abandoned oil derricks at sea. These floating spas are not merely aesthetic, novelty moves. Given mass

More floating spa properties are bobbing up, like the cutting-edge eco-spa, **Floating Gardens**, set to open in a lake near Amsterdam this year. It's not just the "wow factor," given the urban space-crunch and rising sea levels/flooding threat from global warming, architects are now designing all kinds of buildings that float offshore.



Photos courtesy of Floating Gardens

urban migration and an unprecedented lack of city space, combined with global warming and rising sea levels/flooding, the most forward-thinking architects worldwide⁹ are now working on entire sustainable cities, skyscrapers, hotels and retail centers that will float offshore.

And anyone that reads travel magazines knows that eye-boggling, soul-stirring floating or undersea resorts are increasingly getting the salivate-over centerfold: whether the planned Poseidon Undersea Resort in Fiji or the Discus Hotel in Dubai that lets people sleep undersea, or the brand-new Manta Resort on Pemba Island's (just off Tanzania) amazing floating hotel room with undersea bedroom. Soneva Fushi (Maldives) is launching its new Soneva in Aqua concept in 2014: floating yacht villas.

SPACE - A SPA FRONTIER

Wrap your mind around Mobilona Global's plans for the world's first "space spa hotel" set on a manmade island off Barcelona. This 2,000 room, zero-emissions property will feature Earth's first "zero-gravity" spa, where guests will board a Space Glider to travel to the spa set in a high altitude park and tropical garden, where they will experience (vertical wind tunnel-delivered) weightless wellness and beauty treatments. The "post-treatment room" is a Space Observatory

with unobstructed views of the stars. (Similar projects are planned for Hong Kong and Los Angeles.)

The desire to disconnect from the "weight" of the world, and float beyond earth's stress, seems intuitive in our hyper-connected, burned-out world. It feels primal: after all, we sprung from the weightless world of the womb, and as kids we constantly defied gravity on swings or by hanging upside down on monkey bars. To return us to that happier, altered, "floating" state, look for even more gravity-suspending spa and fitness treatments, classes and experiences that can release people from their heavy stress and strain, more quickly and intensely, in 2014.

1 See, for example, several studies (2005, 2007) by Sven-Åke Boord and the Human Performance Laboratory research group at Karlstad University.

2 Profs. J.W. Turner & T.H. Fine studies, 1983, 1991

3 Prof. T.H. Fine, Medical College of Ohio, 1990

4 New York Times: "Relaxation Tanks: A Market Develops, 1981

5 "Float Centers Gaining Steam," 2/2013

6 See: www.floatconference.com

7 Franklin's diary, recording proto-"spa" trip in Southampton, England, 1783

8 Daily Star, UK, "Robots, Weightlessness & Virtual Reality," November 2013

9 See National Geographic (2012) on "floating cities" topic: <http://news.nationalgeographic.com/news/2012/07/pictures/120730-future-floating-cities-science-green-environment/>. Or: view projects from design firm Dutch Docklands, working on Krystall, the Norwegian floating eco-spa: www.dutchdocklands.com.

5



Ferocious Fitness

People are discovering that exercise can be much more than 45 minutes on the treadmill, and they are seeing significant results while having a good time.



Photo courtesy of Tough Mudder

Ferocious Fitness



Competitions like triathlons and popular High Intensity Interval Training Programs add ferociousness to fitness.

Fitness, like fashion, is often about what's new, what's different, what's in and what's out, with a hot new exercise fad seemingly being trumpeted every day. In 2013 we looked at the exploding "label-conscious fitness" culture, which favors programs attached to the insider elite and/or a well-known brand. (Think Zumba®, The Biggest Loser® or Madonna's Hard Candy™). And while name-brand fitness shows no sign of stopping, a new "ferocious fitness" trend is on the rise, led by people who take fitness seriously and who compete to establish their own "personal bests," frequently at semi-professional levels. Also driving this trend are popular High Intensity Interval Training Programs (HIIT), which add ferociousness in small bites and have become a mainstay for time-starved millions looking to take their fitness to the next level.

A key aspect of this new ferocious fitness is fun, and for many enthusiasts, fitness becomes the major ingredient in their social life. Fun also keeps motivation up: whether it is joining group training for a triathlon, getting energized at high-intensity interval training programs, or participating in a dance class that leaves attendees on a happiness high, the common denominator is the sheer joy of working out. And according to Edward L. Decci, PhD, a professor of psychology at the University of Rochester, people who work out for fun, rather than just focusing on results, keep at it longer and actually achieve better results.¹

As people discover that exercise can be much more than a monotonous (and lonely) 45 minutes on a treadmill, and they experience significant results while having a good time, expect to see even more ferocious fitness in the year ahead—

and a new culture where people rush from work to join their running club or HIIT class.

FUELING THE TREND

Walks, Runs, Rides and Marathons

Legend has it that the word “marathon” can be traced to 490 B.C. when the Greek messenger Pheidippides ran from the Battle of Marathon to Athens to announce the Persian army had been defeated. (According to the same legend, he collapsed and died on arrival.) When the Olympics were established in 1896, a marathon race was one of the first competitions. Now there are more than 500 official marathons staged around the globe, and that doesn’t include the tens of thousands of 5K runs, 10Ks runs, triathlons, pentathlons, bike races, walks, fun runs and more held worldwide.

And many of these runs, races and walks have a greater purpose since they are organized for a cause. The actor/comedian Ramón Rivero is credited with holding the first walkathon in 1953 in San Juan, Puerto Rico, to raise money to fight cancer.² Today, millions of people around the world ask friends to sponsor them in events ranging from three-mile “fun runs” to 100-mile bike treks. There are tens of thousands, if not hundreds of thousands, of events taking place across the globe held to raise money to fight disease, support schools and feed the poor.

All this running, cycling and swimming means tens of millions of people training—often in groups—and having a lot of fun doing it.

Reality Entertainment Feeds Real-World Fitness

Reality television dates back to the 1940s when shows like *Queen for a Day* was a hit, but reality shows weren’t identified as a genre until the early 1990s when *The Real World* first aired.³ Today there are hundreds of reality programs, which have become a staple of TV programming around the globe and often enjoy top ratings. (According to the UK’s Daily Mail, producers are working on 170 new shows.) Popular reality sub-genres include shows focusing on lifestyle changes and sports/adventure competitions, such as *The Biggest Loser*, *Extreme Makeover*, *Celebrity Fit Club*, *The Amazing Race* and *Survivor*. For many viewers, engagement with these shows isn’t simply passive. Millions of fans who watch shows that reward participants for winning fitness competitions or making lifestyle changes are inspired to make drastic positive changes in their own lives. There are even Biggest Loser Resorts, which have grown to four locations

Our Competitive Natures

By nature humans are competitive, and sports competition in particular is finely tuned at an early age. According to a recent study on youth sports⁴, in the U.S. alone, there are 21.5 million kids playing team sports between the ages of six and 17, and 60 percent of boys and 47 percent of girls are on a sports team by age six. The Taking Part survey, conducted for the Department of Culture, Media and Sports in the U.K., showed that the majority of adults who play



Our competitive natures start early, with 60 percent of boys and 47 percent of girls playing on sports teams as early as age six.

JDRF's Ride to Cure Diabetes attracts thousands of riders and has raised \$20 million for T1D research.



Photo courtesy of JDRF

sports also played as children.⁵ Imagine how many sports enthusiasts there are with a pent-up demand to compete on a higher level.

Hollywood-based trainer John Colella sees a new competitiveness in his celebrity clients. "Today they want to compete against me—who can lift more, who can run faster, who performs best." Colella points out that not every one is ready for more extreme fitness, and he sometimes has to (tactfully) encourage clients to focus on programs that are more appropriate for their ability.

A "Ripped" Celebrity Culture

Throughout this trends report you'll see references to the staggering influence of the US\$2.2 trillion global entertainment and media industry and the impact it has on a celebrity-obsessed population. As stars from Bollywood to Hollywood embrace the fit lifestyle—and enjoy lucrative fitness-related branding and endorsement opportunities—expect to see celebrities have even more influence on the way we live and look. (It is inspiring to see Bollywood celebrities motivating people in India to be more fit, as obesity has become more common in recent years.)

And Don't Forget Marketing

According to IBS World⁶, revenue for gym, health and fitness clubs in Canada alone in 2013 was US\$2 billion. A lot of that money is then being reinvested in marketing to attract an even larger share of the fitness-obsessed public.

EXTREME FITNESS. EXTREME RESULTS

Take a quick look at most fitness club menus (and increasingly menus at destination spas and wellness retreats) and you'll see more adjectives like "killer," "over drive," "extreme," "primal," "hardcore" and "boot camp" and less of "gentle" and "easy." How intensely a person trains has become a new status symbol.

The Body Holiday LeSPORT, the famous wellness resort in St Lucia, offers a variety of intense fitness programs, including marathon-training and medium- and long-distance swimming, combined with total immersion training. Beach Fit, the spa's highest-intensity class is an extremely popular workout; 150 to 200 people start exercising at 7 a.m., and much of the workout is high intensity.

According to Andrew Barnard, deputy managing director, "People stretch themselves with strenuous mountain hikes and climbing. I think that a lot of wellness destinations have marketing pictures of people sitting and meditating, but behind those pretty pictures is cardio burn."

COMPETITIVE FOR A CAUSE

Athletic fundraising has gone mainstream, with numerous nonprofits (American Cancer Society, Susan G. Komen Walk for the Cure, Cancer Research UK, Walk the Walk in Paris to name a few) raising

money through walkathons, bikeathons, and fun-run events.

And many of these fundraisers require more than just a day's commitment from participants. The JDRF Ride to Cure Diabetes, for example, offers cyclists the chance to train with a USA Cycling certified coach before hitting the road for rides designed for all fitness levels. Cyclists then meet up to take part in a weekend that includes safety seminars, planned excursions, and team-building celebrations. This all leads up to the big event: Ride Day.

But according to an article in London's *Daily Express*, running a single marathon or riding a marathon is no longer enough if you want to raise money. "So many people are taking part in physical challenges and posting them all over social media," says Dr. Richard Godfrey, senior lecturer in sports coaching and human performance at Brunel University in London. "To stand out it is becoming necessary to do something extreme." The article profiled Dave Knowles, a 29-year-old account manager, who is running 13 marathons in 13 days to raise money for Motor Neuron Disease.⁷

HIGH-INTENSITY INTERVAL TRAINING (HIIT)

Popular since the 1970s, High Intensity Interval Training (HIIT) is making an appearance in more extreme fitness programs and has been showing up again on top 10 fitness lists, thanks in part to its popularity with people who are either strapped for time or don't want to spend time on longer fitness regimes. Adding credibility to the program is a study published in the American College of Sports Medicine's *Health & Fitness Journal* (as covered in an upcoming *New York Times Magazine* column), in which two experts claim that a combination of 12 exercises done over the course of seven minutes can be just as good for you as hours spent on other kinds of exercise.

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"(HIIT) is by nature a ferocious way to train: short bursts of high intensity, such as a challenging hike uphill, and then enjoying the view in the recovery phase."

— Tracy Willis, Marketing Manager,
Gwinganna Lifestyle Retreat ,
.....

As defined by the highly successful TRX program, founded by former Navy Seal Randy Retrick, HIIT "refers to workouts where you perform exercises at a near-maximal effort for specific intervals of time, with or without rest between movements." Advocates of HIIT workouts say they save time and take exercise to the next level; there are numerous programs on the market, all teaching the same basic philosophy.



Photo courtesy of Gwinganna Lifestyle Retreat

High Intensity Interval Training at **Gwinganna Lifestyle Retreat** in Queensland, Australia includes boxing, indoor cycling and resistance training.



Photo courtesy of GROOV3

HIIT is making its way to spas too. At the award-winning Gwinganna Lifestyle Retreat in Queensland, Australia, guests are encouraged to include both functional movements and intense interval training in their fitness programs. Tracy Willis, marketing manager, points out that, "(HIIT) is by nature a ferocious way to train: short bursts of high intensity, such as a challenging hike uphill, and then enjoying the view in the recovery phase. And the method can be applied to boxing, indoor cycling or resistance training." Gwinganna also caters to all levels of fitness and physical limitations and always offers guests a choice between yin and yang, the gentler or the more intense.

Another HIIT workout is the Tabata Protocol, created by Izumi Tabata for Japanese Olympians in the 1970s. This one is based on an intensely cardio-driven routine consisting of a five-minute warm-up, followed by eight 20-second intervals of an all-out intensity exercise, followed by 10 seconds of rest, and then two minutes of cool-down. Described on tabataprotoocol.com as "the world's greatest fat burning workout," it is said to also build muscle when practiced just three days a week.

And of course CrossFit, a high-intensity interval-training fitness regimen, developed by Coach Greg Glassman, has become extremely popular around the globe and now has 5,500 affiliated gyms and

more than 35,000 accredited trainers. CrossFit is also a community, and the brand has created the Sport of Fitness, known as the CrossFit Games, where the Fittest Man and Woman on Earth are crowned.

ATHLETES JUST GOTTA HAVE FUN

There are arguably thousands of fitness dance classes around the globe that are designed to be fun for participants. GROOV3, with locations across Los Angeles, is taking fun and ferociousness to the max, with dance workouts featuring a live DJ in every class. Founder Benjamin Allen, a professional dancer and choreographer, created GROOV3 for non-professionals but expert dancers often stop by, which only amps up the intensity.

"When I first started teaching, I realized that people just wanted to have fun," says Allen. "At GROOV3 there is no disciplined routine, and we guide dancers with hand signals so they can add their own flavor. We're building a community of people who come together for an hour and let go of their stresses and worries through the euphoria of music and dance."

THE CALL OF THE WILD

Military-style boot camps in general (the fitness variety, not the correctional kind) have become highly popular. In 2013 Cheapflight.com named the world's Top 10 Fitness Boot Camps, a list that

Over 460,000 participants take it to the max in ferocious **Tough Mudder** competitions.



Photo courtesy of Tough Mudder

included destinations like the female-only, G.I Jane boot camp in Kent, England; the Luxury Algarve Bootcamp in Algarve, Portugal; the Raw Fitness Boot Camp in Phuket, Thailand; and a seven-day climb up Kilimanjaro (Tanzania) led by mountain experts from British Military Fitness.

Taking races (and camaraderie) up a great many notches are themed competitions like Tough Mudder (UK, Australia and US), which bills itself as "Probably The Toughest Event on The Planet™." Each Tough Mudder hardcore obstacle course has 10 to 12 miles of "hills, mud, water, ropes, walls, electric shocks and fire designed to push you to your limit."

Founder and CEO Will Dean is from the UK and previously worked for the Diplomatic Service, overseeing UK Overseas Counter Terrorist Finance Operations.

Over one million men and women worldwide have put themselves to the Tough Mudder test to date, and the company has raised nearly US\$6.5 million for the Wounded Warrior Project. Participants can train for the events at a Tough Mudder Boot Camp, and 80 percent of these tough mudders are members of a team.

THE FEROCIOS FUTURE

Not so long ago the world was neatly divided into two distinct parts: developed and undeveloped countries. Organized fitness programs primarily occurred in more prosperous Western nations, and the rest of the world stayed fit by working outdoors for long hours, walking or running (not driving), and just living life. But that has all changed now that people in developing countries eat more processed food and work at sedentary jobs. In these nations, obesity is unfortunately reaching epidemic proportions.

Will this newly out-of-shape and overweight global population join fitness enthusiasts who are already pumped on extreme fitness? And can a brave, new, healthier world be far behind for all of us?

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- 1 MSNBC, December 12, 2013
 - 2 Puerto Rican League Against Cancer and Wikipedia
 - 3 Wikipedia
 - 4 ESPN, "The Hidden Demographics of Youth Sports," July 11, 2013
 - 5 The Taking Part survey, conducted for the Department of Culture, Media and Sports, UK, 2009
 - 6 IBIS World, Gym, Health & Fitness Clubs Market Research Report, NAICS 71314CA, November 2013
 - 7 The Daily Express, "Pushing beyond our limits: Taking on extreme challenges for charity," December 10, 2013.

6



"Natural" Beauty Meets Social Media

Welcome to
the new era
of beauty
where natural
products,
science and
technology
intersect to
deliver dazzling,
natural results.



"Natural" Beauty Meets Social Media



Social media and photo-sharing apps like **Instagram** and **Snapchat** mean people are expected to look their best 24/7. The "selfie" trend isn't leaving anytime soon.

Could it be that we're finally leaving the era of faux beauty? Spas have traditionally embraced and encouraged the value of inner health leading to that outer glow. But over the last few decades, beauty seekers have pulled, poked, painted and prodded, using a ever-widening wide range of hair and beauty treatments and products to make skin look tighter and younger, and hair smoother, fuller and longer. From red carpets to runways to the office, the "maybe she's born with it" notion of beauty became so outmoded, it wasn't unusual to see people who looked like cartoon versions of themselves.

However in recent years there's been resurgence in less-invasive treatments that revive skin, hair, and nails and make humans look human again. This new era of beauty focuses on the nude, the natural, and a high-tech, low-risk beauty, where organic products, science and technology intersect to deliver minimal-downtime results that are seemingly produced by nature.

And with the growing popularity of photo-sharing apps like Instagram and Snapchat and nearly universal use of Facebook and Twitter, the "selfie" trend, where people are expected to look their best 24/7, isn't leaving anytime soon.

In 2014, we'll see even more of this back-to-basics approach, with spas remaining the torchbearers of a whole-health beauty and further establishing their role by offering even more customized treatments. We'll also see "technology as friend, not foe" in the mix, as machines become better designed for a quick route to lasting, natural loveliness.

FUELING THE TREND

Organic, Organic, Organic

Demand for natural, organic products shows no sign of stopping. According to a 2011 survey by Kline & Company, sales of "natural" personal care products worldwide rose 15 percent to reach US\$23 billion. Asia alone accounts for over 35 percent of the global natural and organic personal care market.¹

Consumers Want Less-Invasive Treatments

At the same time the non-surgical cosmetics procedures market has grown by almost 500 percent over the last 20 years.²

All-Natural Even Dominates the Runway

The new natural look is seemingly everywhere on the fashion pages (Think Calvin Klein) and fashion shows are featuring a much more minimalistic approach to beauty. Complexions and nails are left nearly bare and glowing and hair effortless and healthy in order to truly feature not only the clothing but also the natural beauty of the woman wearing it.

THE NATURAL BEAUTY INDUSTRY: CLEAN AND GREEN

First, the organic and holistic components of natural beauty: The skin is the human body's biggest organ and absorbs 60 percent of topically applied products, according to The Herb Research Foundation. And as people become more aware of the food they put in their bodies—with the spotlight on farm-to-table eating and GMO labeling—they are also becoming more cognizant of what they put on their bodies.

And there's reason for concern. According to the Environmental Working Group, "1 in 5 of all products contain chemicals linked to cancer, 80 percent contain ingredients that commonly contain hazardous impurities, and 56 percent contain penetration enhancers [which make it easier to penetrate the upper level of skin]."³

As awareness of these harmful ingredients grows, so does the trend towards safe, clean, natural and organic skin and beauty care products, free of

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**"1 in 5 of all [beauty] products
contain chemicals linked
to cancer, 80% contain
ingredients that commonly
contain hazardous impurities,
and 56% contain penetration
enhancers."**

– Environmental Working Group

.....

toxic chemicals and their potential side effects. The beauty industry has even picked up the pace in making new products available. During 2012 the U.S.-based Natural Products Association reported a 50 percent increase in the certification rate of new natural products.⁴

While spas have traditionally been at the forefront of the clean-beauty movement, they are becoming an even bigger voice. Inspired by the environmental focus of Rancho La Puerta (Baja, Mexico) founder



California's Sea Awakenings'

vegan mineral scalp therapy masque is ultra-concentrated to deal effectively with irritations, scalp damage and obstructed follicles from shampoo and conditioner residue.

Deborah Szekely, spa leaders have founded the Green Spa Network, which is concentrated on greening all aspects of spa—from design to upkeep to treatments—and whose ranks and outreach continue to grow. The Green Spa Network's official number two tip for a greener spa? "Provide skin care products free from ingredients known to pose health risks such as: parabens, petrochemicals, nanoparticles, and artificial coloring. Instead, look for products that contain natural, healthy, and ethically sourced and produced ingredients."

HANDS AND FEET—NOT JUST ABOUT THE PRETTY

In 2014 we'll see an even greater focus on the gateway spa and beauty treatments—manicures and pedicures—and how they can be yet another aspect of a healthy lifestyle beyond calming breaks and a way to add color.

Take, for instance, mani-pedi innovator Bastien Gonzalez, who helms his highly regarded Pedi: Mani:Cure studios in such places as France, Singapore, Turkey and India. Gonzalez's treatments tout three pillars: podiatry, during which clients are given advice on how to take care of their feet; nail care, which focuses on strengthening and polishing nails by using Bastien's grandmother's technique of reshaping and buffing with chamois leather and pearl buffering cream; and finally a stress-busting, stimulating massage that improves blood circulation.



Mani-Pedi innovator **Bastien Gonzalez's** unique treatments are based on three pillars: podiatry, nail care (strengthening and polishing by buffing) and a stimulating massage to improve circulation.

Also in 2014 look for more spas promoting organic, non-toxic, "fume-free" manicures and pedicures as consumers become even more hip to chemicals—such as toluene, formaldehyde, and dibutyl phthalate (DBP)—used in many nail spas. Karma Organic's polishes and removers are just one of the many products that offer a chemical-free alternative.

GETTING TO THE ROOT OF BEAUTY: THE SCALP

Then there is a growing awareness for clean-beauty treatments on the forgotten skin: our scalp. The human scalp is composed of 230 nerve endings per square inch, so it's a large swath of skin that's more sensitive than we often realize.

Skin care developers, like those behind the vegan mineral scalp therapy masque from California's Sea Awakenings, are concentrating on scalp treatments that are gender specific and mineral- and plant-rich. "We crafted these products specifically for tissue health across the entire scalp using ingredients that are natural, vegan and cruelty-free," says James Davis, Sea Awakening's senior vice president. "They are ultra-concentrated to deal effectively with irritations, scalp damage caused by cancer treatments and follicle pathways obstructed by shampoo and conditioner residue," he continues.



Photo courtesy of Reviv Wellness Spa

REVIV

Reviv Wellness Spa specializes in IV infusion treatments and energy booster shots. Reviv has locations in Miami and at the MGM Grande in Las Vegas with plans to open locations in New York, Los Angeles and Toronto.

LESS IS MORE: FROM NO-POO TO NO-BLOW

Scalp and hair care, in general, is becoming more strategic by doing less for more. Damage can be done after years of re-texturizing treatments, straightening, daily blowouts, chemical color, hot tools, and the daily two-step shampoo and condition regimen. To start, salons are encouraging customers to shampoo less, since daily shampooing leaves residue and also triggers the scalp to produce excess oil. Some people are embracing the "no-poo"⁵ movement and giving up commercial shampoo all together, and many individuals are leaving their shampooing to the experts, making a weekly trip to have it done professionally. Johnny Lavoy, the owner of Moda-Rey Salon and Spa in West Hartford, Connecticut, told *The New York Times*: "There's this whole new breed of young fashionable girls who are getting that once-a-week shampoo and blow dry and just milking it."



Too much fuss also can dry out hair, particularly an issue when hair ages. Argon oil, made from the nuts of Morocco's argon tree, has become the natural cosmetics industry's wonder ingredient because it is nourishing and moisturizing yet non-greasy—perfect for hair. It's not surprising it has become

a much-desired feature of anti-aging-hair care products, including scalp masks, treatment oils, styling creams, and shampoos and conditioners. Hairstylist Eric Sebbag developed his hair- and skin-care line, Sebbag Essentials, based on three generations of his Moroccan family using the beloved oil for their hair. Celebrities such as Demi Moore, Jenny Garth, and Kate Upton stand by his products.

Barbary fig oil, made from a cactus fruit, used as an anti-ageing skin treatment, is Morocco's newest beauty export. But it is expensive, approximately 1,000 euros (US\$1,440) a liter.⁶

BEAUTY FROM WITHIN: NUTRITIONAL SUPPLEMENTS

In 2014 we will see more people opting to occasionally leave the caps on their skincare tubes and bottles in favor of ingesting—or injecting—a supplement,

A 2013 report by Global Industry Analysts currently estimates the global nutricosmetic market will be worth approximately US\$5.5 billion by 2018, with Japan and China leading the market with more than 90 percent of that share. These ingestibles work to support healthy skin, bones, nails, and hair by using vitamins and minerals that do everything from increasing the production of collagen in the skin to helping build proteins in hair and nails.

One player in this market is renowned skincare company Skin Authority, which worked with Dole Nutritional Institute to develop the first whole-

food source of Vitamin D. While its VitaD Fortified™ Illuminating DUO includes a topical elixir, the power player here is the ingestible, 100-percent-vegan, plant-sourced whole-food powder. The powder replenishes our body's internal levels of the vitamin, which is essential for calcium absorption, strong bones, and healthy skin. Skin Authority also provides by-phone skin coaches, who will work up a regimen for clients and be available for questions and counsel; they also service their products and provide skincare counseling to many top spas in the United States, Mexico, Scotland, U.S. Virgin Islands, and Canada.

And if you've ever felt so depleted that the only thing you thought could restore your vigor and healthy glow was an IV drip, you can actually do this now as a non-hospital-patient at the new "drip bars" in Miami, Las Vegas, and Scottsdale. The drip bars' main focus, really, is to cure the dehydration of hangovers in a setting that combines the aesthetic of a bar and spa, but Scottsdale's Drip Room, for one, promotes greater health and beauty benefits, including the Anti-Aging Drip, which calls itself: "The ultimate combination of Vitamin C, hyaluronic acid, and glutathione to plump and smooth your skin. Lightens and brightens and helps turn back time from the inside out!"

ACUPUNCTURE: NOW FOR SKIN

For the last couple of decades especially, the traditional Chinese medicine of acupuncture has become more widely used in the Western world as a treatment for a range of physical and mental health ailments. Therefore, it's not surprising that practitioners have developed a way to apply it to outer-beauty issues as well. Jeanie Bussell, of the Tiffani Kim Institute in Chicago, Illinois, shares her philosophy on what she

calls "acupuncture rejuvenation": "Whatever presents itself outwardly in our skin is a manifestation of internal imbalance," she says. "Blemishes and wrinkles are different in each person, based on our DNA and how we carry stress, our diets, our lifestyle and the overall state of our health." The first thing she does as a practitioner is look at what the body needs as a whole, and she includes nutritional counseling in the mix. Once she gets her client's body more in balance, she moves on to the complexion.

BEHIND THE NATURAL FACADE

While the pared-down, clean-beauty approach to beauty is currently *de rigueur* in the fashion world and a growing trend in general, it must be noted that behind those smooth, makeup-free looks on the red carpet and runways are often advanced technologies that make the natural, minimal-makeup-look possible.

The global economic recovery and peoples' seemingly never-ending desire to reverse the visible signs of aging and improve physical appearance, combined with an aging population, workplace competition and the popularity of reality television programs, are all contributing to a cosmetics *procedures* market that is forecast to grow to US\$17.57 billion in the United States by 2015 and \$2.7 billion in Europe.⁷

For almost 20 years now, laser skin resurfacing has been used to treat blemishes, smooth wrinkles, boost collagen, and zap scars. Microdermabrators, Botox and dermal fillers like Restalyn have also become mainstays at medical spas. More recently, however, newer machines with high tech names like "Diamond Microdermabrasion Peel Machine with LED BIO Face Lift" and "Baby Quasar Plus Red Light Therapy" give

Photo courtesy of
The Tiffani Kim Institute



The Tiffani Kim Institute, Chicago, offers both high-tech and natural skin treatments like acupuncture rejuvenation.



technicians better control to treat specific areas and conditions.

And some medical spas report that one of the hottest trends are the new hormone replacement therapies for men, such as testosterone gels, and bio-identical hormone therapy for women. Both promise restored levels of energy, sexuality, weight loss, more attractive skin and more, but it must be noted: The medical community is still evaluating the associated risks, and with so many treatments and machines available, it's important to do extensive research and get recommendations before making a decision on a treatment.

In her new hit album Beyoncé explores the pressure women feel to look beautiful at all times, and as the "selfie" takes over social media, beauty is no longer the product of hours with a make up artist and hair stylist but an expected constant. Women (and men) are embracing options that don't require constant touch ups; in fact, they don't want to have to apply them at all, thus leading to the popularity of long lasting, "natural" solutions.

Behind many smooth, makeup-free looks are advanced technologies that make the natural look possible.

Whether it's by shampooing less every week (or not at all) or taking advantage of the latest scientific advances, people are clearly finding ways to combine the benefits of both worlds and the new natural look is here to stay. Some people may choose to "go natural" full time, but it is safe to say that nearly everyone is experimenting with the idea of skipping nail polish for a week or wearing no make up when on vacation.

And of course there are those lovely machines and the science that makes it all possible.

1 Zachary Ferrara, senior consultant from Kline, as reported in November 2013

2 Kline and Company, November 2013

3 See <http://www.lohas.com/organic-skincare>

4 Kline and Company, November 2013

5 See definition at http://en.wikipedia.org/wiki/No_poo

6 The Independent, "Morocco taps benefits of Barbary fig oil," August 2011

7 Global Industry Analysts, "Cosmetic Procedures and Products," February 2011

7



Aromatherapy: Scent with Intent

Spa Matilda at Hotel Matilda in San Miguel de Allende, Mexico, invites guests to create their own personalized aromatherapy scents using local ingredients.



Photo courtesy of Spa Matilda

Aromatherapy: Scent with Intent



Photo courtesy of Aromatherapy Associates

According to **Aromatherapy Associates**, aromatherapy is moving in brand new directions, and the power of scent is increasingly being used for its strong therapeutic qualities. Spa clients can now receive customized treatments based on how they want to feel.

Refreshing water with slices of citrus and white fluffy robes—these are the simple amenities spa visitors have come to expect and delight in. But there is another ambient detail that gets overlooked since it usually hits us on a more unconscious level: the calming orange blossom and lavender scents that often waft through spa lounges, treatment rooms, and hallways.

These aromas have been part of spa and wellness experiences for years. Taking its cues from ancient Egypt, China, and India—where fragrant plant oils were used for religious, cosmetic, and medicinal purposes—the spa industry latched onto scent early on as an essential component of wellness and helped launch aromatherapy into the mainstream.

Now aromatherapy is moving in bold directions and playing a greater role in the treatment of pain, as a mood enhancer, in sleep therapy, and to improve cognitive function. And for an industry intent on promoting natural, holistic treatments, it is a perfect fit: Ideally, there are no synthetic chemicals involved, since in its best application, aromatherapy involves the use of absolutely natural oils extracted from many parts of plants, including flowers, bark, stems, leaves, and roots.

But we're entering a new era of customization. As the power scent has on our memory, emotions, and body becomes even more valid—and greater efforts are made to wild harvest the most effective botanicals—spas have been motivated to reimagine their aromatherapy approach from the more generically pleasant to the personalized and transformative. In 2014, there will be a growing effort to craft an

aromatherapy of *intention*, working in tandem with botanists and even high-tech digital technology. In addition, inspiring, local, and natural scent will play a bigger role in the business world and in public spaces (restaurants, retail, hotels, hospitals). Call it beyond sachets and cinnamon candles.

FUELING THE TREND

Increased Demand for Organic

Given the almost immediate impact essential oils have on our mind and emotions, more people are utilizing aroma sourced from organic botanicals to enhance their everyday environment, from their cubicle to their living room. Over the last two years, sales of aromatherapy and body oil products in natural supermarkets grew over 15 percent annually.¹ And this has upped the aromatic ante not just in spa environments but also in public and domestic spaces.

Stress Reducer

We live in a stressed world, and the evidence supporting aromatherapy's power as a stress reducer may be the standout reason for its growing popularity. For instance, one study² analyzed 340 dental patients waiting for appointments, and found that those who received lavender aromatherapy showed significantly lower levels of anxiety than those who did not.

Proven Health Benefits

Aromatherapy's effects, according to a National Institutes of Health site,³ "are theorized to be the result of the binding of chemical components in the essential oil to receptors in the olfactory bulb, impacting the brain's emotional center, the limbic system. Topical application of aromatic oils may exert antibacterial,

anti-inflammatory, and analgesic effects." Most medical studies on aromatherapy are understandably small (and more research needs to be done), but the positive clinical evidence around aromatherapy, especially for "quality of life" measures, continues to expand. For instance, trials⁴ have indicated its benefit in reducing: stress and anxiety, insomnia, depression,

In 2014, there will be a growing effort to craft an aromatherapy of intention, working in tandem with botanists and even high-tech digital technology.

tension headaches, systolic and diastolic blood pressure in people with hypertension, and agitation/emotional problems in people with dementia. It has even helped curb nicotine cravings in smokers.

Use in Other Industries

Based on scientific studies, businesses are recognizing the strong connection between scent and memory and using aromatherapy in retail environments, restaurants, hotels, etc. As reported in the *Daily Telegraph*⁵, there is a growing body of research that reveals smells connection to memory and improved recall. For instance, a Harvard University study showed that when people were exposed to a rose scent while they slept after studying, they had greater recall of the material.



The Natural Le Spa at Four Seasons Resort in Marrakech offers an Aromatherapy Signature Treatment, featuring herbs grown in its organic garden.

At Spa Matilda,
the Apothecary Concierge schools guests on the beneficial properties of local artisanal ingredients in customized aromatherapy.



Photo courtesy of Spa Matilda

Mood Booster

Smell is also increasingly being recognized as an instant mood-shifting and brain-engaging sense. Research shows that the sense of smell is 10,000 times stronger than our other senses, which must travel through the body before reaching the brain. Only the olfactory response is instantaneous and leads directly to the brain, giving our central nervous system direct exposure to the environment.⁶

GREATER PERSONALIZATION AND CUSTOM BLENDING IN SPAS & RESORTS

Generic use of aromatherapy is on the way out as more spas and hotels develop custom approaches based on personal needs and preferences. "As we look more to holistic wellness, the mind and emotions are becoming more and more important," explains Geraldine Howard, president of Aromatherapy Associates and creator of Inner Strength bath and body products. "Spas are moving away from the 'fashionable and mainstream' marketing ploy of aromatherapy and are beginning to use essential oils and the power of scent for their true purpose—using quality products for their innate therapeutic healing qualities. And spas and wellness businesses are taking the 'old aromatherapy' in new directions."

This new trend is exciting and personal. Imagine going to a spa and receiving a treatment with essential oils based on your immediate needs and desires? At the worldwide Westin Hotels & Resorts' Heavenly Spas, a partnership with Aromatherapy Associates has resulted in clients receiving customized treatment based on their "How do you want to feel?" Wellness

Wheel. To achieve the client's intention, the therapist will carefully select essential oils and techniques, music, and offer health recommendations.

Meanwhile, Spa Matilda at Hotel Matilda in San Miguel de Allende, Mexico, invites guests to concoct their own personalized blend of natural remedies and scents with the help of the spa's Apothecary Concierge, who schools them on the beneficial properties of local artisanal ingredients such as rosemary, sage, mint, juniper, and cocoa. The Concierge then concocts the personalized blend, which is used in body treatments and aromatherapy during the stay and/or at home.

**"Spas are moving away
from the 'fashionable and
mainstream' marketing ploy
of aromatherapy and are
beginning to use essential oils
and the power of scent for
their true purpose..."**

— Geraldine Howard, president of
Aromatherapy Associates

Then there's Natural Le Spa at Four Seasons Resort Marrakech, which has introduced a head-to-toe Aromatherapy Signature Treatment to its menu, featuring the personalized use of aromatic herbs grown in the resort's organic garden. Rosemary, mint, lavender, and verbena are all picked for their specific healing properties to rejuvenate, harmonize, and relax the body and mind.

Meanwhile, the Hypnôze Spa, in Cuzco, Peru's Palacio Nazarenas, has two local shamans guiding them in the production of its own essential Andean oils. Members of the nearby community also do the actual harvesting.

At the brand-new The Vines Resort & Spa, overlooking the Andes in Argentina, the spa is focused on personalized, multisensory experiences. To deliver this custom fragrance approach, the spa has partnered with Argentinian perfume lab FUEGUIA 1833.

And at the Hotel Renew, on the island of Oahu, there is actually an aromatherapy concierge program: For their stay, visitors can choose from four custom-blended scents: the Bimbi (omile, bergamot, rose); Isola (gardenia, tuberose, fig); Vaniglia (vanilla, jasmine); or Verde (fresh green notes, melon, tonka bean, jasmine).

SCENT GOES HIGH-TECH

In 2014 we will even see the marriage of authentic spa aromatherapy to the latest personalized app technology.

Nick James, who received a master's degree in botanical science at Oxford University, recently relaunched his 13-year-old aromatherapy company, Body Bliss, which is unveiling the Intentional Aromatherapy App. Available in participating spas in early 2014, it allows spa directors to access deep, "Masters-Degree-in-Botany" levels of information on aromatherapy, but in a simple and easy-to-understand format so they can deliver professional, personalized, healing, and intentional experiences to clients.



Photo courtesy of Body Bliss

Body Bliss is unveiling the *Intentional Aromatherapy App*, which will allow spa directors to easily find "Masters-Degree-in-Botany" information on aromatherapy.

Spa professionals will be able to use the alchemy iPad app along with the in-spa Aroma Design Lab blending bar to create a totally personalized product for their clients—one which is used in treatments and another they can bring home. Using 20 organic and wild-harvested essential oils, the Intentional Aromatherapy iPad App can create up to 250 individual combinations of blends to create specific physiological effects.

The app allows the therapist and the client to mindfully collaborate and focus on the specific intention of the treatment. A client can select from four different options: Positive Outcomes (how you want to feel in the moment); Loving Messages (carrying your intention to a recipient, which takes gift giving to a whole new personalized level); Plant Spirits (which focuses on the process of blending); and Special Seasonal Blends for holidays and seasonal treatments.



Research shows that hospital patients given lavender aromatherapy treatments generally have an easier time sleeping.

"Aromatherapy is often overwhelming, but this app puts the power in their hands," says James. "It puts the guest in charge."

BEYOND THE SPA WALLS: NEW SCENTS IN NEW PLACES

With aromatherapy offering diverse physical and mental benefits—and scent's intense connection to memory—it's no surprise more and more businesses are bringing customized scent to unexpected environments.

Diffused and curated scents are getting a much bigger place in retail shops, hotels and restaurants, as well as healing environments like hospitals. And you could call this aspect of the trend the "spa-ification" of so many other businesses.

It's not necessarily a new idea; for instance, for years hotels have understood the value of having customers associate their brand with a specific scent to create more "memorable" stays. But increased awareness of aromatherapy and the power of a scent impression has made the practice more ubiquitous and intentional.

And here's more proof that aromatherapy's usage is getting pushed in unexpected directions: In Los Angeles, aromatherapy artist Persephenie Lee works beyond old scented perfumes and candles and instead handcrafts exotic, fragrant jewelry, candies, ceramic vessels and other uncommon objects—even

scented paint—in a space that is equal parts ancient apothecary and art gallery. (And where individual perfumery sessions are on offer, to create 100% bespoke scents.)⁷

Retail: From Playlists to Scentlists

In 2014 scent will grow as the new emotion-targeting tool in more retail businesses, adding another layer to environments that already include carefully designed ambient lighting and highly curated musical playlists. According to a large survey by independent institute BVA and Air Berger, scent marketing is a powerful sales and customer loyalty weapon: When used 78 percent of customers report they intend to return to that store, and it increases impulse purchases by 38 percent.⁸

Restaurants: More Than a Great Taste

You'd think delicious-smelling food would be enough, but some trendy, expensive restaurants are incorporating enhanced scent to create more dynamic, five-sense experiences. Baum & Whiteman's *12 Hottest Food & Beverage Trends for Restaurants and Hotel Dining for 2014* report states, "Food is not enough... restaurants are enhancing the dining experience by fiddling with our senses...redefining 'eatertainment.'"⁹ For example, Shanghai's Ultraviolet uses four smell diffusers along with a myriad of other sensory additions, while the Casino de Madrid's invitation-only techno-dining room diffuses aromas like mushrooms and grassy wetness at different points throughout the multistage, multisensory meal.



Aromatherapy artist **Persephenie Lee** handcrafts exotic jewelry, ceramic vessels and even scented paint in a space that is equal parts apothecary and art gallery.



Photo courtesy of Mercedes-Benz

The spa-inspired **Mercedes-Benz 2014 S-Class' AIR-BALANCE system** lets drivers select from a variety of aromatic scents, including an organic and wild-harvested blend. The seats also simulate a hot stone massage.

Hospital Scents by Design

Hospitals are increasingly using "emotional design" to positively transform their reputation from being cold and stressful places to being warm and healing ones. For example, many more hospitals, like Mãe de Deus Hospital in Porto Alegre, Brazil, are now diffusing aromatherapy blends throughout the air in rooms and public areas. But aromatherapy is showing even more applications in basic patient care, and that's because medical research indicates its benefit in diverse clinical/hospital scenarios: from studies that show it can contribute to reduced pain intensity during dressing changes in wound care to those that indicate it can help relieve anxiety, pain, nausea and/or vomiting, or to strengthen contractions, during childbirth. Hospitals are also known to have a chronic insomniac patient problem, but with research¹⁰ showing that patients given lavender aromatherapy treatment generally have an easier time sleeping—even with the distractions of the ICU and CCU—using scent is on the rise.

Even in Cars

Yet another example of the wild expansion of spa-pioneered aromatherapy is the new 2014 Mercedes S-Class. Not only do the car's seats simulate hot stone massage, but drivers can also select from a variety of aromatic blends (like "Sports Mood" or "Downtown Moods"). There is even an option for drivers to create an organic and wild-harvested blend for a custom ride.

DOWN THE ROAD

Customized aroma will only get more specific as technology keeps innovating. Will the science of scent allow people to alchemically concoct the aroma of their grandmother's unique, perfect blueberry pie? Let's hope so. Until then, trend away from ho-hum, "spray and pray" aromatherapy approaches in spa/wellness businesses to far more personalized, *intentional* applications (using a wider array of botanicals and pure essential oils) will continue to fuel people's needs for the right aroma at the right moment, and for the right therapeutic mind-body effects. The medical and marketing research on aroma's effect on our brains and body mounts. And at a time when people want a very quick way to alter and enhance mood—and relieve stress in our frantically stressed-out world—aromatherapy is proving to be a healthy and natural way to do just that.

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- 1 SPINS. [2012]. Aromatherapy & Body Oils: Snapshot Report—Data Ending 03-17-12, Supplemental Insights Analysis. Schaumberg, IL: Winters, D.
 - 2 "The effects of lavender scent on dental patient anxiety levels: a cluster randomised-controlled trial." *Community Dent Oral Epidemiol*, 2010.
 - 3 See: <http://www.cancer.gov/cancertopics/pdq/cam/aromatherapy/healthprofessional/page5>
 - 4 As with most clinical trials, most aromatherapy studies have been done on people in hospitals or with serious medical conditions/illnesses.
 - 5 *The Daily Telegraph*, May 12, 2010
 - 6 Serene Aromatherapy
 - 7 *Los Angeles Times*, 2013
 - 8 BVA survey for Conforama
 - 9 <http://baumwhiteman.com/2014TrendForecast.pdf>
 - 10 <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC3203283/>

8



Wellness Retreats Rise... & Urbanize

**Salamander
Resort & Spa**
is a distinct
sub-trend that
is emerging:
more urban-
close, wellness-
immersive
retreats.



Photo courtesy of Salamander Resort & Spa

Wellness Retreats Rise... & Urbanize



Photo courtesy of Lanserhof

Lanserhof Austria is expanding with a new, even larger property—with a vast, spectacular 5,000 square foot treatment center. Lanserhof Tegernsee opens this year near Lake Tegernsee in the Bavarian Alps.

After years of recession-stalled stasis, look for forward thrust on the destination spa—or true “wellness retreat” front—where personalized, immersive wellness programming is the DNA, and life transformations are the goal.

The International Spa Association defines a destination spa as a property “with the primary purpose of guiding individuals to develop healthy habits.” The term “destination spa” is generally embraced more by the spa industry, and can confuse real people. So, in this trend we use “destination spa” and “wellness retreat” interchangeably. Famous examples of course include Chiva Som in Thailand—Canyon Ranch in the U.S.—or Rancho La Puerta in Mexico. And this trend is about new growth in, and new directions for, those unique properties where the serious business of intensive fitness, healthy food and other mind-body programming typically gets mixed with serious pleasure—and warm support.

And never has our stressed-out, overweight, chronic-disease-plagued world needed the triage these destinations deliver more.

In 2014 (and beyond), we will see more all-new destination spa properties, like the just-opened VANA in India’s Himalayan foothills. We’ll see revered brands go on an expansion march, whether Miraval from the U.S. or Lanserhof from Austria. We’ll see more headline-grabbing, hit-all-angles, big wellness “campus-palaces,” but we’ll see even more smaller wellness retreats at more (affordable) price-points, and usually with more targeted angles: whether no-nonsense weight loss boot camps or rustic yoga retreats. Additionally, we’ll see so many more resorts

add so much "destination spa" programming, that we may have to expand our idea of the "destination spa" beyond just a noun...to a "verb."

The New Urban-Close Wellness Retreat

And a distinct sub-trend is emerging: more urban-near wellness-immersive retreats. If "destination" spas (the word is a hint) have long been associated with remote desert hideaways or desert islands reached by seaplane – now more will be reachable by train! This is one smart, inevitable development for diverse reasons. For one, the other most powerful global demographic trend beyond the chronic disease explosion is the unprecedented urbanization of the world's population. Two: people are increasingly vacation-time-deprived and are therefore opting for shorter vacations closer to home. This wider trend has been dubbed "Near-Away" travel,¹ where people are choosing getaways even closer to home than with the recession-era "staycation" model, and bypassing stressful air travel altogether.

We will increasingly see both magnificent, major destination spas and smaller wellness retreats appear 20-40-60 miles out from major cities like Beijing and New York. So, while the allure of detoxing for two weeks in the Maldives isn't going anywhere, these new urban-close wellness retreats will represent a powerful, needed, new model for our world and time. Wellness transformations need to be where the people are, and this new breed of properties will make them, and the ongoing tune-ups needed to make them stick, far more accessible, to far more people, far more often.

FUELING THE DESTINATION SPA GROWTH IN GENERAL

- Destination spas deliver something woefully missing from traditional medical care: intensive, supportive fitness, nutrition/weight loss and stress-reduction programs—exactly what's clinically proven to make lifestyle changes happen. And the stats on how our world is in dire need of such changes could fill a library. Preventable diseases cause roughly two-thirds of all deaths.² The global obesity rate has doubled since 1980.³ And it's the developing world's waistlines that are now developing fastest, where overweight/obesity rates have tripled in the same time.⁴ Consider: by 2018, three in four people in countries like Kuwait, Mexico, Venezuela—and yes, the U.S.—will be overweight or obese.⁵
- New destination spa property builds are, of course, being fueled by economic recovery: investment is coming back and travelers are spending again. And the Global Spa & Wellness Summit's report⁶ on the wellness tourism market shows what a high-spender the core destination spa-goer is. The study makes a key distinction between two types of wellness tourists, "primary," where healthy experiences are the sole motivation for the trip, and "secondary," where wellness experiences are pursued as part of a trip. Primary wellness tourists may represent the market minority (13 percent of trips), but when these well-bent tourists go, they spend. They average US\$2066 on each international, and US\$700 on each domestic, trip—or two to three times more than the average tourist, respectively. The growing ranks of primary wellness tourists are driving the destination spa resurgence.



Photo courtesy of Salamander Resort & Spa

If "destination" spas have long been associated with remote desert hideaways or desert islands reached by seaplane—now more will be reachable by train and car.

Lanserhof hits the urban-close destination spa trend with their new Lans Medicum in Hamburg, which they dub the first “urban day care center.” City-dwellers can take in the Lans Center’s 30 years’ experience, in the heart of the city.



Photo courtesy of Lanserhof

SPECIFICALLY FUELING THE URBAN-CLOSE WELLNESS RETREAT TREND

- Urban wellness retreats are on a major growth track because of the relentless urbanization. In 1900, 13 percent of the population was urban—in 1950, 29 percent was—in 2005, 49 percent. Today, more than half of humanity calls an urban area home, and urbanites will further double by 2050. We’re now living in what scientists call “The Urban Millennium,” and the urban wave will continue to be most powerful in developing nations⁷: China has built 500 new cities in just 25 years⁸, and by 2050, Indian cities will add an additional 497 million—and Chinese cities 341 million—people.⁹ And while economic opportunity has shifted to cities, this urban crush will lead to a massive, growing population of stressed-out, nature-deprived, over-worked and time-crunched city-dwellers desperate for within-reach rejuvenation.
- At a recent global forum for destination spa owners worldwide,¹⁰ the industry concluded that their top challenge was devising ways to keep guests “closer” after their one-two week stays, to prevent them from falling from “detox back to re-tox.” A key solution identified: the world needs more urban-close destination spas, and harder-to-reach destination spas need more urban satellites/partners, to keep people on track through follow-up visits.

RECENT, GLOBAL DESTINATION SPA GROWTH

The Brand Expansion Drive

Established, cult destination spa brands are suddenly on an expansion drive. Standout examples include:

Famed detox clinic Lanserhof of Austria is adding two new locations that squarely hit both sides of this trend-coin: growth for both rural “destination” spas and urban wellness retreats. They have just opened Lans Medicum, an urban satellite in Hamburg, where city-dwellers can spend whole days taking in treatments on an outpatient model. And Lanserhof has also opened an even larger, rural destination spa in the Bavarian mountains near Lake Tegernsee in Germany.

Biologist Henri Chenot has been treating the well-heeled for over 30 years at the Palace Merano Hotel-Espace Henri Chenot in the remote Italian Tyrol, with a hardcore clinical program integrating medical diagnostics, restrictive diet, hydrotherapy, and biontology, an approach to psychological aging. Now five new Chenot locations have spawned that, again, hit both the rural, “destination” and “urban” spa trend. There’s Chenot’s new, rural destination spa at Italy’s L’Albereta hotel, and four new Chenot Espaces Vitalités spas in mostly urban hotels, that incorporate his famous “cure”: Moscow’s Barvikha Hotel, London’s Grace Belgravia woman’s club, Athen’s Grand Resort Lagonissi, the Selman in Marrakesh and the Malindo hotel on Kenya’s coast.

An All-New Wellness Retreat Star

The just-launched VANA, Malsi Estate in India. Five years in the making, this utopian-feeling property set on 21 acres of ancient forest is a chic, serious "wellness campus" buzzing with Ayurvedic, TCM and Tibetan doctors, yoga masters, fitness trainers and nutritionists. The jaw-dropping wellness center features 50 treatment rooms, four yoga and meditation centers, multiple pools and a cutting-edge spa and gym. And the locally sourced, dosha-customized, super-healthy food is worthy of a five-star restaurant. Focused on total wellness (physical, mental, emotional and spiritual), and Ayurveda in its purest form, everything one experiences at VANA is customized. (And it's been strongly hinted that more VANA properties will be developed, the next possibly in Bhutan.)

Smaller, Boutique & More Targeted Wellness Retreats

In addition to big destination spa launches like VANA or Lanserhof Tenersee, we'll see even more smaller, intimate, fully-immersive wellness retreats proliferate globally. These range from the luxe to the few-frills, and often revolve around more targeted programs like weight loss or yoga. Just a very few examples:

The just-opened ARO HA luxury detox retreat overlooking stunning Lake Wakatipu near Queenstown, New Zealand. The regime: vinyasa yoga, hiking, meditation, massage and a calorie-restricted vegetarian diet.

The new Lonhea Alpine Clinic (Swiss Alps) where a doctor-led team of experts customize seven-day

plans for everything from weight loss to sleeping problems, with intensive yoga, hikes, personal training and special diets. A truly forward-thinking component: guests depart with heart rate monitors and undergo four months of home exercise tracking and strict online coaching follow-up.

Many more rustic yoga retreats like the new Silver Island set on a private island in the Greek Aegean.

Even more traction for more affordable, strict weight loss boot camps, like The Biggest Loser properties (U.S.) which just added a fourth location in Chicago.

MORE DESTINATION SPA PROGRAMS AT RESORTS

We'll see more "pure" destination spas, but we'll also see far more destination spa programming at properties classified as spa resorts than ever before. So, our concept of "destination spa" needs to expand beyond "noun," to "verb." Once-more-distinct property categories like "spa resort" and "destination spa" are now seriously in motion and getting shaken up.

Again, SRI International's distinction between "primary" and "secondary" wellness tourists' motivations helps explain this rising trend. More properties are morphing into hybrid spa resorts/destination spas by offering primary wellness tourists the option of immersive wellness "tracks" (with special diets, intensive fitness), while still delivering the more relaxed spa resort experience to secondary wellness tourists.

There are so many examples of this hybrid model. For



Photo courtesy of VANA

VANA, Malsi Estate (India) opened a stunning, innovative retreat set in Himalyan foothills, where "wellness" spans the physical, mental, cultural, natural and nutritional—and is 100 percent personalized.



Photo courtesy of Como Hotels & Resorts

instance, the brand-new Retretas Velaa Private Island (Maldives) is a spa resort, but they also offer seven immersive, multi-day wellness programs with yoga masters and personal training. The new resort Hotel Domestique (South Carolina, U.S.) offers ongoing triathlon training camps.

More spa resorts are adding full-blown, on-site destination spas:

- Germany's famed Brenner's Park Hotel & Spa will unveil a standalone, five-story medical destination spa, Villa Stéphanie, this April, which will be connected to HausJulios, which brings together top medical experts in everything from dermatology to cardiology. The result: a comprehensive medical-wellness-spa offering.
- The University of Colorado's Anschutz Health and Wellness Center (a medical institute focused on prevention) is planning to transform Colorado resorts like The Peaks Resort and the Stanley Hotel into full-blown medical/wellness destinations.

Two brands that are really on the march, Six Senses and Como Hotels & Resorts, also illustrate different aspects of the hybrid spa resort/destination spa trend. (And they're both also very on trend with new urban wellness properties.)

Como Hotels & Resorts (14 global properties) has just one all-wellness-focused retreat in Bali, but offers "destination-spa-within-a resort" programming through its COMO Shambhala Retreats, which deliver five-day wellness programs (yoga/Pilates training, workshops and healthy cuisine regimes) to most properties. This hip "hybrid" brand and their urban resorts are growing: In January their first U.S. property

opens, a "well" alternative to Miami's debauched South Beach, as does their Point Yamu property right outside Phuket, Thailand.

Six Senses (10 resorts, Oman to Vietnam) is expanding like wildfire, and their new directions indicate a hybrid spa resort/immersive wellness retreat BRAND strategy. Six Senses will open an impressive nine new properties in the next 36 months (in China, France, Taiwan, Santa Lucia, Bali, Tunisia). And in 2016 they unwrap their first "pure" wellness retreat concept in Bhutan: a cool, creative travel circuit of five wellness lodges based on the wellbeing pillars behind the country's breakthrough "Gross National Happiness Index." And Six Senses is also increasingly an urban wellness player, opening in places like downtown Cartagena, Columbia in 2016. Their CEO has stated that over the next five years he sees the brand growing to 40 properties, with more urban-wellness destinations on the drawing board.

A CLOSER LOOK AT URBAN-CLOSE WELLNESS RETREATS

Let's further explore that crucial, new destination spa trend we're tracking: major wellness retreats opening just a short train or boat hop away from major metropolises...giving burned-out, nature- and peace-starved city-dwellers easy-to-reach, rejuvenating wellness-immersive destinations.

A destination spa renaissance is now flowering across the megalopolis that stretches from Boston to Virginia on the U.S. East Coast, where 50 million people (about one in five Americans) live on less than two percent of the country's land area. Examples:

- The Mirbeau Inn & Spa will open their second destination spa at Pinehills just 45 minutes out of Boston this spring, with a rich lineup of daily yoga, fitness and wellness classes. As their managing director put it, "We are a near-urban resort...and we want our future locations...to be near large population centers."
- The world-renowned Miraval destination spa (Tucson, Arizona) will unveil its first new property in 2015 with Miraval at Natirar (New Jersey), less than an hour from New York City. Set on a 500-acre estate, it will feature a vast spa, wellness pavilion and yoga center, along with Ninety Acres Culinary Center, that marries a culinary school to a celebrated farm-to-table restaurant. (And CEO Philippe Bouguignon has stated that Miraval is actively looking at expansion in five other U.S. locations – big destination spa brand news!)
- Indian billionaire, Subhash Chandra, has purchased the old, NYC-close Catskills resort Kutshers (of Dirty Dancing fame), and will give the 1,300+-acre property a US\$90 million wellness makeover by 2015. The vast, new Nature Cure Lifestyle Management Center will revolve around Ayurvedic medicine, yoga and biodynamic cuisine.
- Salamander Resort & Spa, falling into the "hybrid" spa resort/destination spa category, just opened 20 miles from Washington, DC on a historic property that marries an equestrian focus to comprehensive wellness programming. They have just partnered with a healthcare brand to offer "Salamander 360": and this new team of doctors and nutrition coaches will help guests get physically and mentally fit.

Across the world to China, where most spas are traditional hot springs centers or western-style hotel spas, and people in search of comprehensive wellness retreats typically flock to places like Thailand. Given China's powerful economy and mind-bogglingly numerous, big cities, it's inevitable that more wellness retreats will be built "at home," and city-close. One example underway: GOCO Retreat Niutuo just 50 kilometers from Beijing (coming early 2015): a huge, high-end, integrated wellness retreat that combines local angles like TCM and hot springs bathing with western medical diagnostics, fitness, yoga, spa and lifestyle consulting.

Urban-near destination spas will hit the Middle East: On Saadiyat Island, off the coast of Abu Dhabi, the DNA Integrative Medicine and Wellness Centre will open at the existing St. Regis in 2015, a holistic wellness facility that will combine western medicine and eastern healing traditions. When the Anantara Doha Island Resort & Spa opens off the coast of Doha in 2014, it's expected to include the brand's first, full-blown wellness concept, MSpa, with year-round, doctor-led detox, weight loss and stress-reduction retreats.

URBAN DESTINATION DAY SPAS

As a more predictive trend, you can feel an urban destination DAY spa model percolating, where more comprehensive, deeper approaches to an individual's "total health self" could get continuously supported, beyond the gym membership or occasional massage. Lanserhof's new Lans Medicum in Hamburg is exactly that. And you can see the model at play at the



Photo courtesy of The Mirbeau Inn & Spa

This spring, **The Mirbeau Inn & Spa** will open a new destination just 45 minutes outside of Boston.

Now being developed: **GOCO Retreat**, Niutuo, just 50 kms from 11.5 million people in Beijing. The massive, comprehensive wellness facility will offer medical diagnostics, TCM, yoga, meditation, hot springs & more.



Photo courtesy of GOCO Retreat

women's-only club, Grace Belgravia in London, where "everything wellness/beauty" is under one (admittedly pricey) roof: fitness, healthy food, spa - and where they've assembled London's hottest doctors for fertility, acupuncture, detoxing, dermatology, you name it. Their founder, Kate Percival, nailed the need for new, urban "day-destination-spas" when she explained why she decided not to develop a faraway Italian destination spa. Arguing that you shouldn't have to "fly abroad for an integrated spa experience," she instead decided to create a place "where you can go on a day-to-day basis, that's sustainable... (with) everyday support from lifestyle to healthcare." These models feel right, and we predict more to come.

THE FUTURE

If things have been quiet on the destination spa front these last years...No more. And one overwhelming fact will increasingly fuel more of the world's need for these unique places—our rampantly overweight, aging, chronic-disease-ridden world. As it becomes crystal-clear that the traditional medical approach of dashing off prescriptions has done nothing to change people's behaviors, things are reaching a tipping-point. The global economist Thierry Malleret recently predicted¹³ that in the not-too-distant future more governments will simply be UNABLE to afford healthcare for their populations. "And many nations may soon make wellness—and healthier behaviors—compulsory for their citizens."

Then, what destination spas provide will be people's lifeline to one-on-one support/coaching to establish healthier eating and exercise behaviors and stress-reduction/mindfulness approaches that boost our weakest muscle, willpower. And more governments and insurers will also then support, and reimburse for, "destination spa programming" with proven outcomes.

Another equally overwhelming fact will drive continued momentum for the urban-close sub-trend—the relentless, extraordinary urbanization of the world's population.

Barring economic reversals, the future is: more new, innovative, diverse destination spa properties, and more wellness transformations and urban-stress-decompression-retreats on tap just a train ride away. What could be more welcome?

1 See Hotel Business' (UK) 2014 travel trends.

2 WHO data 2012, 2013

3 WHO data, 2012

4 Overseas Development Institute (UK) report, 2013

5 Euromonitor International, "The Future of the Weight Management Industry," 2014

6 "The Global Wellness Tourism Economy," 10/2013

7 UN World Urbanization Prospects reports

8 Amitabh Kant keynote, GSW, 2013

9 UN Dept. of Economic & Social Affairs, 2013

10 2013 Global Spa & Wellness Summit's inaugural Destination Spa Forum

11 Travel Trade Gazette interview, 2013

12 The Boston Globe, 2012

13 Global Spa & Wellness Summit keynote, 2013

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Death & Spas: Thriving During Life's Transitions

Caring is truly the DNA of the spa & wellness industry. It's only natural that spas are where people turn for comfort and healing during challenging life transitions.



Death & Spas: Thriving During Life's Transitions



Photo courtesy of Miraval Spa & Resort

Spas offer safe environments for life's hardest challenges. In 2014 and beyond, we will see spas and wellness centers bring comfort, stress relief and healing to more people.

A core part of a spa's DNA is personal connection and helping people cope with stress and, increasingly, pain. And a growing percentage of spas around the world offer services specifically created for people suffering from serious illnesses like cancer, and numerous spas and wellness businesses provide free services and raise money to support health-related causes.

But in 2014, spas are starting to have the "death" conversation and help people cope with terminal illnesses, whether they are patients or caregivers, in the most comfortable and supportive environment imaginable. The core strengths and beliefs of the spa/wellness industry are also impacting the health care community, and we are seeing hospitals and long-term care facilities break down the boundaries between hospitality and health care—and recognizing the power of touch and creating more soothing environments for the people under their care.

Spas are the natural healers for life's hardest challenges and also help people manage stress-related issues, often brought on by difficult transitions such as job loss, divorce...even war. Caring is truly the DNA of the industry, and in 2014 and beyond we will see spas and wellness centers bring comfort and healing to more people...even those who are transitioning to the end of their lives.



Photo courtesy of Green Valley Spa & Resort

Green Valley Spa & Resort (U.S.)

offers guests a Stress Recovery Program to help those dealing with a variety of life transitions like loss of a loved one, relationship issues or career changes.

FUELING THE TREND

An Aging Population

No matter how you define "Baby Boomer"—described in Australia as people born between 1946 and 1961 and in the U.S. as those born between 1946 and 1964—the sheer size of this aging demographic is having an outsized impact on the world. Consider this: By 2030, when the first boomers reach 84, more than 20 percent of America's population will be over 65.¹ That means the number of people dying every year will also increase—and the industry is starting to recognize that end-of-life care is a business opportunity.²

The Toll of Stress

The World Health Organization (WHO)³ estimates that mental disease, including stress and related disorders, will be the second-leading cause of disabilities by the year 2020, and that stress disabilities, which include impaired physical and mental functioning, lost work days and a high use of health care services, are as significant as workplace accidents and medical conditions. WHO also reports that over one million people commit suicide every year.

Rise of Preventable Diseases

The world's population is increasingly becoming unhealthy. In OECD nations, one in two adults is overweight and one in six is obese. By 2020, preventable chronic diseases will account for 60 percent of all disease worldwide.⁴

Hospice Care

Hospice, which comes from the same linguistic root as hospitality, began in 1948 when Dame Cicely Saunders founded St. Christopher's Hospice in a London suburb. The international organization provides medical care, pain management and spiritual support in countries, including Africa, Australia, Canada and the UK.⁵ Spas are a natural—but very different—extension of the palliative care offered by the hospice program, which can offer patients prescription drugs for pain management and provide medical services.

Acceptance of Death

Worldwide there is more awareness and acceptance of death, in part due to the rising influence of Eastern spiritual practices such as Buddhism and Taoism. The website "Let's Have Dinner and Talk About Death" teaches people to have open conversations about end-of-life decisions and openly discuss what matters in life, as well as death.⁶ HBO's new series, *Getting On*, an end-of-life comedy adapted from the BBC program of the same name, is rife with hospice humor and deals openly with dying and aging.⁷

The Über Trend: Mindfulness

Mindfulness practices such as meditation, are also driving the acceptance and awareness of death. Millions of people around the world in countries like India, Vietnam and Japan practice some form of meditation; the Western world is recognizing the benefits of mindfulness, and more spas and wellness retreats are offering meditation training.

SARANA by Clodagh

is a collection of upholstery and privacy curtain textiles for healing environments. Clodagh is an award-winning designer who was inducted into the Interior Design Hall of Fame.



Photos courtesy of Clodagh

DESIGN IS A HEALING ART

Clodagh, the award-winning designer, believes good design supports and enhances both the spirit, as well as the body, and can transform people's lives. She is passionate about providing a serene environment for people who are ill and the need to address and acknowledge death as a natural part of life that can be celebrated... just as birth is.

She is currently designing the National Center for Palliative Care Innovation that will integrate palliative care in an assisted living model for the HealthCare Chaplaincy in New York City. Her new SARANA textile collection, which was created in collaboration with CF Stinson textiles, is named for a word that means "safe place" from the ancient Buddhist language of Pali. The design incorporates principles of wellness philosophies such as biophilia, chromotherapy and chakra to achieve a line of upholstery and privacy curtain textiles that support healing environments. The textiles, which will be used in health care, spas/hospitality and residential settings, are inspired by nature and explore ancient healing symbols.

According to Clodagh, studies have shown that the more visits a patient receives, and the longer visitors stay, the shorter the recovery time will be. The collection is intended to provide comfort and a sense of security for both patients and visitors.

Clodagh said, "If I was told I had six months to live, I would go to a spa." Her new collection reflects the nurturing, comforting environment that so many spas offer.

CARING IS THE DNA OF SPAS

Many businesses in the spa, beauty and wellness industries support causes that help others, such as the EIF/Revlon Run/Walk for Women, which supports the fight against women's cancers. And numerous spa owners and their staffs are opening their doors and hearts to people suffering from severe illnesses.

The Spa Care Center is the first standalone spa in Florida to offer services specifically tailored to cancer patients, including post-mastectomy nipple tattooing. Every staff member is either a cancer survivor or has close relatives who have had cancer, and the spa only uses products that are suitable for patients undergoing radiation or chemotherapy who often have sensitive nails and skin. The Spa Care Center also makes home visits to clients who are not able to visit the location.⁸

The Grove in Bournemouth is Britain's first hotel dedicated to cancer and life-limiting illnesses, and Touch Therapy at Radisson Blu, also in the UK, is among the many spas in the UK offering treatments for people being treated for all stages of cancer.⁹

And an article published at Spafinder.com featured several spas that are helping to fight cancer, including:

- The Farm at San Benito's Six-Night Integrative Cancer Care program focuses on natural, holistic approaches for the entire body, along with strengthening the immune system and boosting energy through scientific-based integrative therapies. The Farm's team of medical specialists

works with patients' oncologists and administers such treatments as a nutritional assessment, individualized meal plan, colon hydrotherapy, IV vitamin infusions and ozone therapy.

- Upachaya Eco-Lodge & Wellness Resort in Honduras offers all-inclusive Living Beyond Cancer-Healing in the Tropics retreats that focus on the physical and emotional issues regarding wellness following cancer treatment.
- And the Connecticut Spa at Norwich Inn has partnered with The ECHO Cancer Foundation to create a "fragile client" treatment menu that includes wellness massage therapy, a relaxation facial and a hydrating body antidote.

The article also described treatments and programs found at spas and fitness centers that are effective for cancer patients, such as:

Manual Lymph Drainage

Though the benefits of manual lymph drainage have been debated, one randomized clinical trial on SpaEvidence.com discovered early physiotherapy, including manual lymph drainage, effectively worked in preventing secondary lymphedema in women who had surgery for breast cancer that involved dissection of lymph nodes.

Yoga

A National Taiwan University review reported yoga has a "more positive impact" than supportive group therapy when it comes to reducing anxiety, depression and stress in cancer patients.



Photo courtesy of Spa4ThePink

Massage

It was discovered that massage greatly reduces nausea in women with breast cancer undergoing chemotherapy, according to a University of Göteborg randomized controlled trial, found on SpaEvidence.com.

Pilates

Post-mastectomy breast cancer survivors saw significant improvements in shoulder and neck rotation, quality of life, mood and body image when using the Pilates method, says a study conducted by the Mayo Clinic.

TEACHING THE INDUSTRY

Spa4ThePink teaches the spa industry how to work with end-of-life clients and to bring compassion to healing with cancer patients. Founder Julie Bach noted that, "We have found that spa professionals are not only uncomfortable but they don't know how to set healthy boundaries for themselves when working with cancer patients nearing end of life."

Mindfulness instructor Felix Lopez, who is a former monk, works with spa professionals, including massage therapists, acupuncturists, skin-care professionals and yoga instructors, to experience love and compassion for themselves and their clients. Spa4ThePink also brings Lopez to cancer hospitals and support centers to work directly with cancer patients and their caregivers.

The company has its own center that integrates mindfulness, mediation and yoga with spa services and presents immersive retreat experiences that teach cancer patients, nurses and spa professionals how to understand what mindfulness is and how to bring it in to their personal lives—and learn lifelong skills that they can practice anywhere.

"When thinking about developing a yoga and mindfulness practice at home, it is much like a skin-care routine at home. You do it every day," said Bach.

Spa4ThePink embraces the healing powers of spa & fitness centers by teaching wellness professionals how to work with, and show compassion for, end-of-life clients and cancer patients.



Photo courtesy of Miraval Spa & Resort

Guests at **Miraval Spa & Resort** (U.S.) conquer the Glants Ladder. Destination spas offer the perfect environment for people to reflect on their lives and cope with challenges like divorce and job loss.

"You come in for a facial to supplement what you are doing, just as you go to yoga classes to supplement your home practice. You have to have a home practice, or you will not see results."

MANAGING THE STRESS OF LIVING

And while all spas are in the business of helping people relax, many now offer specific stress management programs such as Brenners Park-Hotel & Spa (Germany), Terme di Saturnia (Italy), Kamalaya Koh Samui Wellness Sanctuary & Holistic Spa, COMO Shambhala Estate, Fivelements, Puri Ahimsa (all in Indonesia) and Grand Resort Bad Ragaz (Switzerland).¹⁰

Green Valley Spa's unique stress recovery program, under the direction of Mental Health Director Dr. Sidney Young, includes diagnosing the causes and severity of a person's stress as related to his or her medical and mental health. The difference? The diagnosis takes place in a safe and nurturing spa setting. Specific therapies are designed to help a guest relax while the body is being strengthened through exercise and healthy nutrition. Guests can schedule personal one-on-one sessions and are encouraged to participate in group activities like hiking, yoga and cooking classes; coping skills, such as meditation, yoga and journaling, are also taught and encouraged. The goal is to send the guest home with the tools to manage stress in their everyday lives.

Green Valley has invited returning war veterans (and their families) who are suffering from post-traumatic stress disorder to be guests at the spa, which is located in the red rock canyon country of Utah.

DIVORCE, JOB LOSS & OTHER TRANSITIONS

Of course serious illness and death are not the only challenges people face in life. Divorce and job loss are among the many life challenges millions cope with every day, and practically any destination spa or resort spa can be a good place for people to reflect, rejuvenate and restore their lives. Spas that offer wellness programs are a particularly good choice, and for those who want to ease the transition by spending time with friends and families, many destinations offer special getaways.

And if we need any more proof that spas and death are sometimes a good match, you might find it interesting to know that one spa has reported a number of guests requested that their ashes be strewn on the spa's grounds once they're gone. How wonderful to know that for some, a spa is what they choose as their final resting place. Clearly, it must have meant a lot to them when they were alive.

1 WebMD

2 *Spa Business* described end of life care as "a market that is ripe for disruption" in its *Spa Business Handbook 2013*.

3 World Health Organization, *Global Burden of Disease Survey*, updated 2004.

4 World Health Organization

5 National Hospice and Palliative Care Organization

6 Bloomberg, September 2013

7 *Los Angeles Times*, "Leave 'Em Laughing," November 2013

8 *The Sun Sentinel*, "New spa services tailored to pamper those in cancer's grasp," October 2013.

9 The Daily Mail, "Gluten-free chateaux and anti cancer spas... However ill you are you CAN get away," June 2013.

10 Spafinder.com

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Top 10 Surprising Spa & Wellness Destinations

It's not such a small spa world after all: Look for emerging spa & wellness markets in countries people may not have previously considered.



Photo courtesy of The Nam Hai (Vietnam)

Top 10 Surprising Spa & Wellness Destinations



Photo courtesy of Longevity Wellness Resort Monchique (Portugal)

Savvy spa-goers are demanding more exotic destinations and indigenous experiences to stamp on their spa passports.

When one thinks spa vacation, a few select destinations immediately come to mind: Italy, Thailand, Turks and Caicos...sound familiar? But savvy spa-goers are pushing back against the "been there, done that" travel mentality and demanding more exotic destinations and indigenous experiences to stamp on their spa passports, thereby spawning a significant new industry trend: a map of new spa and wellness settings to explore that extends beyond the normal hotspots.

Look for emerging spa and wellness markets found in countries people may not have previously considered—countries that may have had troubled histories, poor economies, natural catastrophes, etc. The magnitude of this trend lies in its ability to prompt a changed perception of each country, instigating a "wellness halo" that can provide a brilliant tourism growth tactic, project safety and generate great press; the debut of one new property—Nicaragua's luxury Mukul Beach, Golf & Spa is a prime example—single-handedly delivers potential to rejuvenate a nation that may have a seemingly bad rap.

It's not such a small spa world after all.

FUELING THE TREND

A Need for the Exotic

A powerful, wider travel trend underway is people seeking entirely new-to-them destinations with entirely authentic, hyper-local experiences. For instance, in Spafinder Wellness 365's new "2013 State of Spa Travel" report, travel agents report that the top two emerging luxury travel trends are: 1) "People desiring



Photo courtesy of Uma by COMO, Paro

Isolated Bhutan offers full immersion in the utmost of exclusive destinations.

more exotic, off-the-beaten-path destinations," and 2) People wanting immersion in more unique, local, indigenous cultural experiences vs. "generic luxury."¹

Investing by Tourism Boards

Countries are increasingly recognizing the revenue and jobs that wellness tourism creates, so more tourism boards, including Colombia, Morocco, Nicaragua, and more, are stepping up to the plate and investing.

More Wellness Tourists

SRI International's new report² on the US\$439 billion wellness and spa tourism market reveals that while today the U.S. and Europe heavily dominate for both inbound and outbound wellness tourism, that is going to change dramatically. Fifty-percent of global wellness tourism growth through 2017 will come from Asia, Latin-America and the Middle East/North Africa—regions where seven of ten of our spa/wellness "fresh faces" are located.

Wellness-Obsessed Baby Boomers

Baby Boomers, who are retired/retiring, and possess the income to travel, have for years represented the core spa traveling demographic³—they are an "explorer" generation looking for new destinations.

Global Consciousness

Global social interest and consciousness among travelers continue to grow, as does a sense of

interconnectedness spurred by the Internet Age and instant access to information about a big, global world. People can easily explore—and then want to experience—other cultures' healing traditions.

ASIAN FOOTPRINT FULL STEAM AHEAD—PART 1: BHUTAN

Hot commodities coming on board can be found in South Asia's Bhutan. Destined to be an eco-tourism adventure destination rising, Bhutan's strict conservation efforts—60 percent of the country's total area has been designated as protected nature preserves, according to its tourism council—paired with its spiritual, Zen-like disposition expose travelers to wellness in every sense (think practicing meditation at the Himalayan peaks, seeking introspection at the Tiger's Nest or reserving a spa visit to one of the luxury resorts newly opened or on the horizon). There's no doubt the isolated Bhutan, known for its Gross National Happiness index, offers full immersion in the utmost of exclusive destinations.

And boosted tourism figures prove Bhutan's rising popularity: Visitor arrivals peaked at 105,407 in 2012, marking a record growth rate of +64.62 percent over 2011.⁴ Additionally, there's huge potential for wellness-inspired, adventure eco-tourism, thanks to the country's strict conservation commitment mentioned above. "The tourism policy encourages

more nature- and adventure-based experiences in a bid to diversify products, as it will encourage longer stays and repeat visitations," according to the *Bhutan Tourism Monitor Annual Report 2012*. These prolonged stays and repeat visits can take place at COMO Shambhala Retreat at Uma by COMO, Paro, or the five Six Senses spa lodges across Bhutan scheduled for completion in 2016.

OUT OF AFRICA BECOMES OBSOLETE: GHANA

Ghana, said to be the most stable country in West Africa, is becoming a Mecca for adventurists who want to engage in the great outdoors. A crop of safari wilderness lodges are the rising helm of travel tourism here, enhanced by a robust hotel/resort-development boom. And with its delicate balance of traditional and modern culture, the hospitable Ghana offers a diverse destination that allows travelers to rove and find something uniquely refreshing at every turn. For the wellness traveler with an adventurous streak, days can be spent lounging on dreamy beaches, marveling at colonial forts, ancient mosques and Sahelian architectural-style homesteads or exploring safari-style through Mole National Park, Ghana's largest national park, where wildlife—elephants, hippos, warthogs, colobus monkeys and buffalo—roams.

Ghana's capital city of Accra is a growing hotspot, fueled by a favorable investment position.⁵

Forecasted Accra developments include Kempinski Hotel Gold Coast City, complete with Resense Spa (opening 2014); Shangri-La Hotel, Accra (2017); and Accra Marriott Hotel (2014). And while Ghana's room count declined one percent year-to-date October, its supply could increase 7.5 percent "if all 879 rooms in the total active pipeline open, according to STR Global."⁶

CENTRAL AMERICA UP & COMER—BEYOND COSTA RICA: NICARAGUA

Just 30-some years ago, Nicaragua was engulfed in a revolution and bitter civil war, which makes it all the more remarkable that it's now considered in the early stages of becoming a spa destination. Here, beach-encased hotels and rainforest-enveloped rustic eco lodges coincide with eco-adventure wellness activities and indigenous treatments (volcanic clay wraps are common). Expect the unexpected here: sweeping rainforests teeming with exotic wildlife and the spectacular Lake Nicaragua to accommodate nature lovers, coastal destinations and prime surfing beaches of San Juan del Sur for water enthusiasts, active volcanoes for thrill-seeking travelers and colonial cities for history aficionados.

To show how far Nicaragua has come, consider this: Tourism increased 11 percent from January through September 2012 and is projected to experience a 12 percent increase in 2013.⁷ The boost is most likely



In **Nicaragua**, beach-encased hotels and rainforest-enveloped rustic eco lodges coincide with eco-adventure wellness activities and indigenous treatments.

After decades of turmoil, **Vietnam** is quickly being discovered in the spa and wellness world.

fueled by its affordability and greater accessibility (including more flights and cruise stops). Another factor: Central America's rapidly growing eco-tourism market is prompting growth opportunities in wellness and eco-adventure crossover tourism.⁸ Also playing a part is the arrival of fresh faces on the spa scene, including the \$250-million beachfront Mukul Beach, Golf & Spa, along Nicaragua's Emerald Coast, which opened February 2013 to great fanfare as the country's first luxury boutique hotel and spa; Mukul, or "secret" in Mayan, "...will be a game changer for Nicaragua," says Nicaraguan entrepreneur Don Carlos Pellas. Other plans afoot comprise Hyatt Place Managua, part of the Hyatt brand's planned four-Central-American-property portfolio, and Wyndham Hotel Group's Wyndham Milagro del Mar Resort (opening 2014).

EXPANDING EUROPEAN TRAVEL PLANS: PORTUGAL

Many tack Spain to their travel itinerary but what about Portugal? Spa devotees may soon ask themselves why they have yet to add it to their list of vacation spots—the westernmost country of mainland Europe, on the Iberian Peninsula, is proving itself as a surprising contender on the wellness front—and for good reason. Portugal averages 3,000 hours of sunshine annually, boasts more than 500 miles of beaches bordering the Atlantic Ocean and presents a rich cultural heritage, making it an ideal destination to spend a wellness holiday (and with excellent road, rail



Photo courtesy of The Nam Hai.

and air transportation options, Portugal is a few hours from many European capitals).

Pick your preference—mountain or sea, from the Algarve to the capital of Lisbon—and a hotel or resort spa is there to suit each need: thermal spas that tap into therapeutic mineral springs in Centro de Portugal, Porto and the northern region; thalassotherapy spas along the coastline and the island of Madeira; a vinotherapy spa at Porto's The Yeatman, which has partnered with Caudalie Vinothérapie® Spa; and a blend of beauty, medical and wellness at Longevity Wellness Resort Monchique in the Algarve—the latter features its own exclusive partnership with La Clinique de Paris. Other properties to spotlight include: Carmo's Boutique Hotel; Four Seasons Hotel Ritz Lisbon; Grande Real Villa Italia Hotel & Spa; Pousada de Cascais; and Vidago Palace.

ASIAN FOOTPRINT FULL STEAM AHEAD—PART 2: VIETNAM

After decades of turmoil, Vietnam is quickly being discovered in the spa and wellness world. Revel in treatments inspired by loyal techniques passed down from generations, as well as those that honor nature. Improve circulation with restful bathing ceremonies and stimulate energy flow with massage services using pressure-point techniques; when not pursuing wellness, take pleasure in this homeland made up of heavenly beaches, vibrant rice patties and villages dotted with ancient historic citadels against stately forest and mountain backdrops.

The country's wellness sector is forecasted to grow 16 percent annually over a five-year timeframe⁹—in fact, spa numbers have seen such a boom, intent to open Vietnam's first spa association is underway.¹⁰ Anticipate future project rollouts that will complement already existing properties in places including Ho Chi Minh, Hanoi and beyond: Asian Coast Development's US\$4.2-billion Ho Tram Strip complex in southern Vietnam (under construction); Six Senses Saigon River (under construction); Six Senses Con Dao, Six Senses Ninh Van Bay and Evason Ana Mandara (all open); The Nam Hai, a member of the Leading Spas collection (open); Fusion Maia da Nang (open); and AVANI Quy Nhon Resort & Spa (open).

OTHER DESTINATIONS

Colombia

Lose the stereotype of Colombia's cartels, conflict, coffee and Escobar eras—instead, focus on this South American country's fascinating turnaround that exposes travelers to what really sizzles here: tropical beaches, the vibrant Bogotá, majestic Amazonian jungle and snow-capped Andean mountains. Also piquing travelers' interest is its spa scene—stay tuned for the soon-to-be-opened Away® Spa at W Hotel Bogota and Six Senses Cartagena, which, upon its 2016 premiere, will mark the brand's entry into South America.

Croatia

With its rich history and storybook setting that blends medieval cities with cosmopolitan ones, Eastern Europe is finding its way onto travelers' bucket lists. Take note of Croatia, whose strength resides in adopting a wellness approach with an affinity to

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**Countries are increasingly
recognizing the economic
opportunities that spa and
wellness travel provides.**

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nature. Spa treatments (thalassotherapy and thermal springs are popular) pay homage to the inspiring surroundings—revitalization is easy when encircled by sapphire Adriatic waters, golden Pannonia plains and protected national parkland! Croatia's joining of the European Union is also anticipated to be a significant move.¹¹

Lithuania

Eastern Europe offers easy access to ample destinations along the Amber Road and afar brimming with spas, from Croatia to Lithuania. Varying from utilitarian to lavish, spas and wellness centers in this small but beautiful country—picturesque with rolling meadows, hills and forestland, peaceful bodies of water, castles and churches—emphasize rituals



Photo courtesy of Kempinski Hotel Cathedral Square

Eastern Europe
offers easy access to
ample destinations
along the Amber
Road and afar.



Photo courtesy of The Pearl Marrakech

Recent events further help brand **Morocco** as one of the world's main players in the future of spa and wellness.

like amber therapy and mineral springs. Highlights include Kempinski The Spa at Kempinski Hotel Cathedral Square in Vilnius (the brand's first property in the Baltic States); further explorations will lead to the acclaimed Druskininkai, suggested as Lithuania's oldest healthcare resort; Birštonas, famed since the 19th century for balneotherapy; and the seaside resort town of Palanga.

Morocco

An ancient home where medieval architecture mingles with modern, seaside and mountain towns abound and endless desert sand dunes and spice markets intrigue, Morocco sets the tone for an alluring spa experience. Time-honored and contemporary wellness creates an exotic mystique, intertwining such staples as age-old Moorish baths and balneotherapy with the popular-as-of-late argan oil. Recent events—the announcement of the 2014 Global Spa & Wellness Summit in Marrakech and the debut of standouts like The Pearl Marrakech—further help brand Morocco as one of the world's main players in the future of spa and wellness.

Saudi Arabia

The spa scene is rising in the Kingdom of Saudi Arabia. A wide range of hotel brands are jumping on the Mideast bandwagon with numerous developments in the pipeline, including: a Kempinski hotel with Resense Spa in Al Khobar, for early 2014; talks for a One&Only resort—the brand's first in the Kingdom—

near Jeddah on the Red Sea; and Accor and Meliá Hotels International properties intended for Riyadh in 2015. Why the development explosion? Saudi Arabia brings to the table exquisite coral reef diving in the Red Sea and Arabian Gulf; sand dunes riding; ancient archaeological sites; safari trips on camelback—and for spa-enthusiasts, several hot springs.

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- 1 Spafinder Wellness, Inc.[®]'s seventh annual *2013 State of Spa Travel Report*
 - 2 *The Global Wellness Tourism Economy*, SRI International, 2013
 - 3 Spafinder Wellness, Inc.'s seventh annual *2013 State of Spa Travel Report*
 - 4 *Bhutan Tourism Monitor Annual Report 2012*, a publication of The Tourism Council of Bhutan
 - 5 It's 'Ghana' Be Great in Accra – A Snapshot of a Growing Market, HVS London, 2013
 - 6 Hotel News Now, "Five Hotel Investment Hot Spots in Africa," 2013
 - 7 Travel Agent Central, September 2013
 - 8 The Global Wellness Tourism Economy, SRI International, 2013
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