

The Wind of Change; a whisper to Wellness



“It used to be **food** that created the buzz that lured travelers to all sorts of **destinations**. Now, **wellness is taking over** as travelers seek out healthier, more active vacations. Food is still a draw, of course, but it better satisfy a wellness craving.”

Skift 2019

Is the travel industry paying enough attention to wellness?



55%

willing to pay extra for wellness activities on future vacations

68%

plan their next vacation around improving mental well-being

76%

of consumers want to spend more on travel to improve their well-being



2x

Growth of all tourism, representing 18% of all global tourism

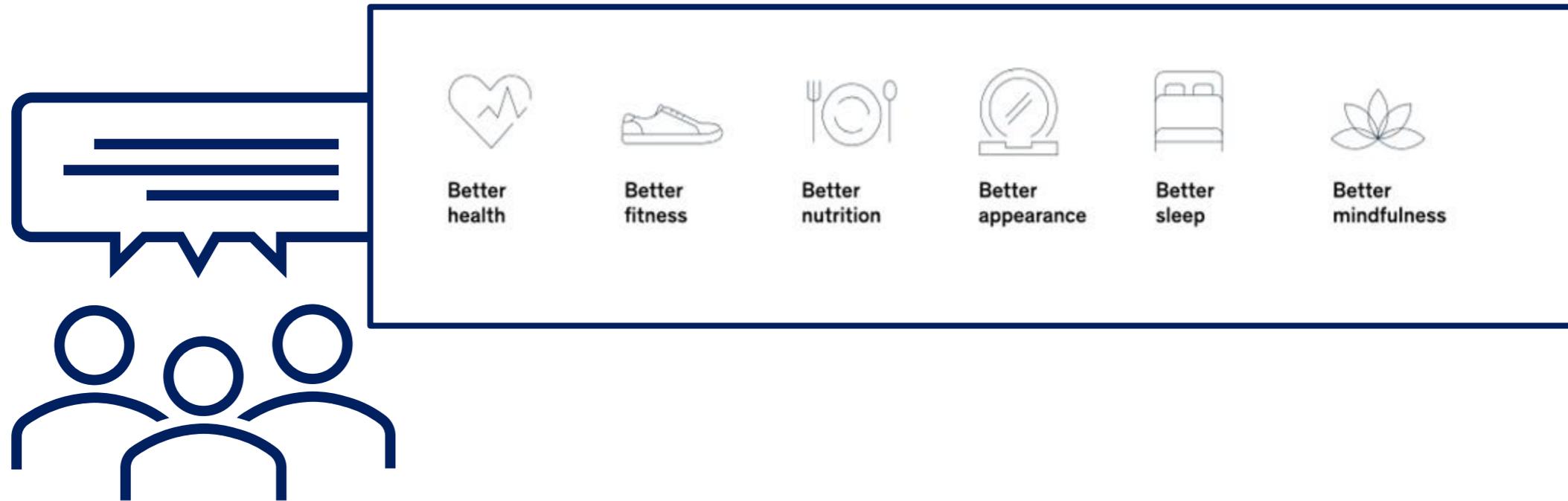
21%

Year on year growth through 2025 until sector is worth \$1.1 tn

35%

Premium that wellness guest spends to the overall tourist market

Do we understand the clients needs and what they are willing to pay for?



Our idea of 'being-well' has shifted from a purely physical, ie. looking good, to a more holistic perspective that now incorporates feeling good and functioning well.

This perspective represents a shift away from a singular focus as its understood that everything is connected (how we move, how we eat impacts the quality of our sleep) and looks to positively impact physical, mental, emotional wellbeing to create a sense of Vitality.

Is the travel industry catering to all age groups or leaving money on the table?

We all (should) want to function optimally and so it has multi generational appeal. This is in contrast to spas, which provided a sense of indulgence & relaxation aimed only at adults. Wellness widens the market size and is also more resilient in challenging economic environments.

Children



Youths



Adult



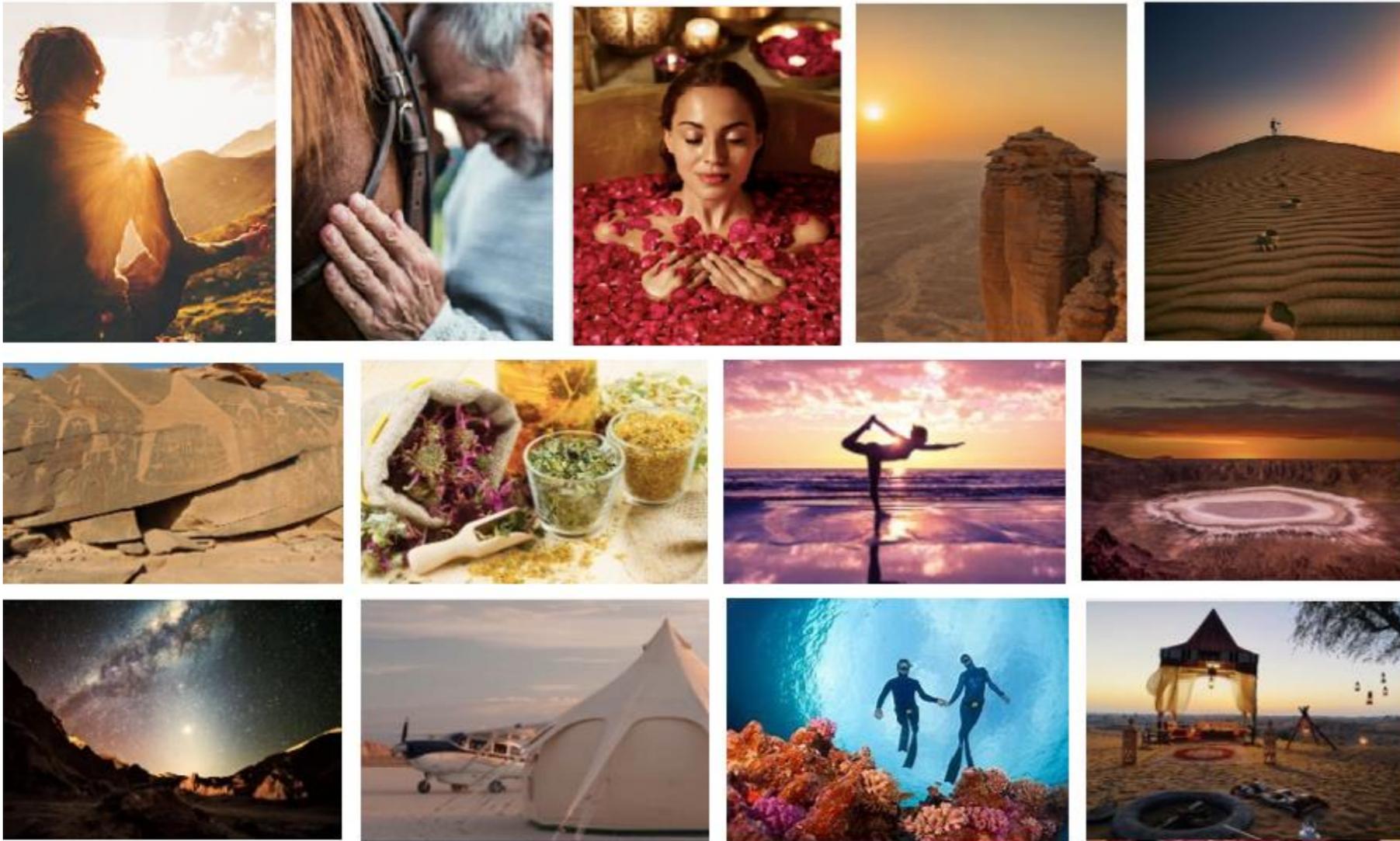
Elders



physical	Motor skill development	engaging & inspire to stay active (move away from social media devices)	vitality (strength, endurance and flexibility) luminosity (appearance) Symptomatic relief: sleep, digestion, cognitive health, weight	Ageing (motor skills, vitality)
mental	Confidence	independence, mastery	resilience, balance	neuro plasticity, memory, independence
emotional	fear, anxiety	acceptance, belonging	love, competitiveness	loneliness, fear, depression
social	Engagement / learning to interact	belonging with peer group	family and community connection, self development	remaining engaged and relevant

Destination marketing: a way to promote wellness and well-being

Governments are waking up to wellness with campaigns based on medical wellness (Thailand)
provenance of tradition, herbs and nature (Costa Rica and Saudi Arabia)



Images credit: Saudi Tourism Authority

How to leverage a gap in the wellness market?

Children

Youths

Adult

Elders



58%

agree they are more interested in multi-generational family trips than ever before



0%

Resorts offer targeted wellness for anyone other than adult market



0%

Destination wellness marketing focuses on multi generational

When are medical credible programs suitable and to whom?



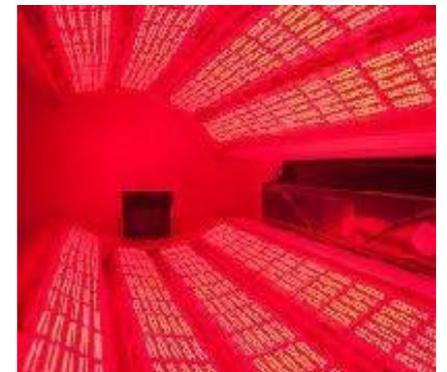
Testing - the ability to identify root cause and craft precision programs. This personalised approach is the most efficient use of time and spend with the highest potential health benefits



Programming - the holistic approach unlocks synergies between nutrition, therapies, movement and recovery and monetises ancilliary facilities such as wet areas that were previously cost centers



Technology - using equipment that requires medical oversight but not operation allows for higher operating margins. Experience has shown that guests take tech treatments in addition to rather than in place of regular spa treatments.



Where should a hotel position itself for optimal returns?

	Spa	Lifestyle Wellness	Medical Wellness
Proposition	Indulgent and relaxing treatments	Holistic approach with integrated programs	Medically backed treatment
Challenges	Value proposition is the build out of extensive pre & post areas	Sourcing higher skill sets in the team & who may not 'get' hospitality service standards	Salaries assoc. with MD level & not an easy fit with hospitality
Success factors	The entire service flow curated towards celebration	Integration across Rooms, F&B and needs credible program leadership	Developing an approach / method that becomes a point of difference
Impact	Supports hotel positioning without high operational costs	Can drive year round occupancy and supports longer guest stays	Drives minimum stays and supports highest rates across the year
Suitability	4 & 5* hotel properties	All properties	Select 4 & 5* properties

Is there a limitation to wellness?

Wellness comes from a **mindset of thoughtfulness ... not from a facility**

- ✓ combining from food (sourced > vegan)
- ✓ movement (yoga, surf, cycling, horse riding)
- ✓ therapies (collaborating with local therapists)
- ✓ amenities (organic cottons, bathroom amenities, devoid of plastic bottles)

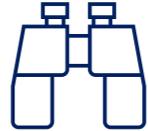


Return

- reputation
- loyalty (repeat visitor)
- premium pricing for their market segment

It's possible that the best wellness programs will come from a small B&B that **collaborates** with the local community and is inspired by nature.

What's in for you...



The focus on wellness is only going to increase and so sitting on the side lines is not an option



Wellness is accessible across the entire hospitality segment and not limited to the 5* properties. Unlike spa, the hurdle is in how we combine services rather than a tick box list of physical facilities



Stand out and increase client loyalty, stay relevant to existing ones



Targeted Social Media campaigns and story telling



Access new clients, communities and ecosystem