



2013 Trend Report

TOP 10 GLOBAL SPA & WELLNESS TRENDS FORECAST





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Susie Ellis

President, SpaFinder Wellness, Inc., and Chairman & CEO, Global Spa & Wellness Summit

SpaFinder® Wellness' annual forecast of global spa and wellness trends celebrates its 10th year with the 2013 report. Over this extraordinary decade, our goal has been to identify the most important, provocative ideas brewing across the global spa/wellness space that are poised to impact businesses and their clients, not only in the year ahead—but beyond.

When we unveiled our first trend forecast a decade ago, the industry was in a different era. There was a focus on beauty and pampering, medical spas were a new concept and the thought of spas as centers for wellness—and the idea of wellness tourism—was just emerging.

This year's report makes it startlingly obvious how far we have evolved, how sophisticated spas and consumers have become and how walls are literally being broken down. We are excited to forecast a dramatically changed world where the industry fully embraces its role in helping people find wellness modalities that can transform their lives, from "Healthy Hotels" to "Earthing" to "Spa-Genomics." But it's also a world where men will increasingly seek anti-aging treatments at the same medical spas they might not have considered just 10 years ago.

We hope you enjoy and benefit from the 2013 forecast. I can't think of a better time to be part of the exciting world of spa and wellness!

Each year a team of research analysts develops the SpaFinder Wellness Trend Report. The in-depth forecast is developed from ongoing surveys with the SpaFinder Wellness Network, which consists of over 20,000 spa, wellness, fitness and beauty providers, thousands of travel agents and hundreds of thousands of consumers. We conduct ongoing interviews with top industry stakeholders, review current research, articles and case studies and our team of editors and experts visits spa and wellness establishments regularly.

Our goal is to get the industry, and the consumer, thinking further ahead and to provide data and analysis to support each trend.



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Photograph by Joshua M. Schottenstein.

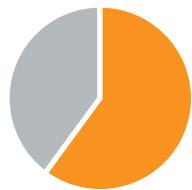
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HEALTHY HOTELS

The very concepts of a “vacation” and business travel have long been associated with riotous excess: too much eating, drinking and too little sleep in the stately pleasure palace that is a hotel. This century-old model has left too many travelers less healthy when they check out than when they check in. But, with a global stress and chronic disease epidemic intensifying—and more people stressed out 24/7—what constitutes a true “vacation” and “hospitality” is now being rewritten. In 2013 (and beyond) far more hotels will serve up health-focused guest experiences and “wellness everywhere” environments bent on delivering much-needed revitalization for people who simply can no longer afford “the old travel.”

If the gym and spa have traditionally been positioned as mere “amenities” (locked up in the hotel basement), now those walls are being conceptually (and literally) broken down. And this healthy hotel trend takes diverse forms: from the rise of wellness-branded hotel chains, to far more fitness, spa and healthy eating and sleeping programming percolating across so many more properties.

FUELING THE TREND



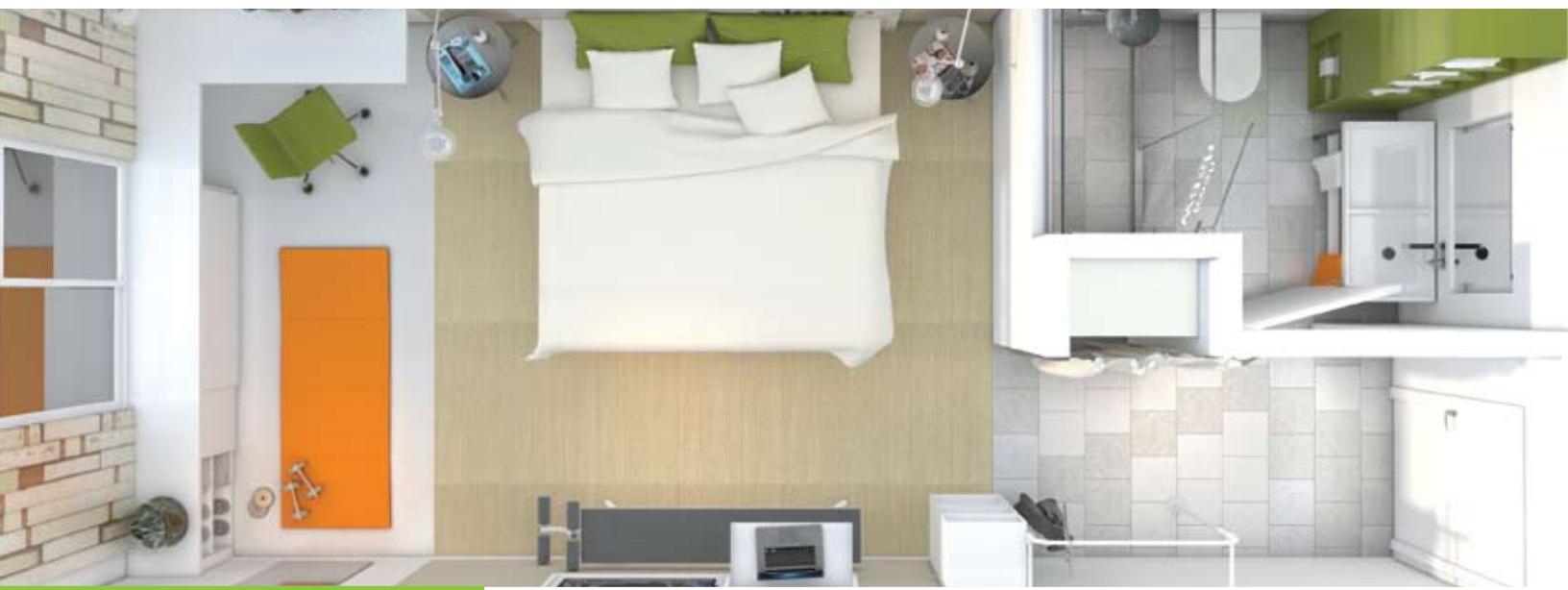
Preventable chronic diseases are accelerating globally, and will account for **60%** of the global burden of disease by 2020.¹



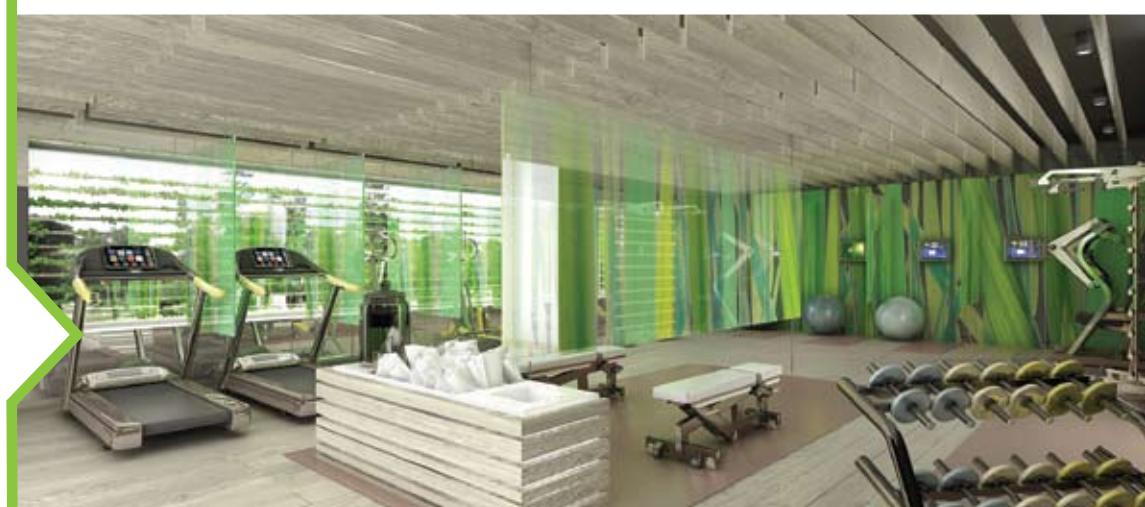
Health-focused travelers now represent **40%** of the travel segment.²

- In OECD nations, **1 in 2** adults are overweight and **1 in 6** are obese.³
- Runaway corporate healthcare costs mean **2 in 3** larger businesses have adopted formal employee wellness programs,⁴ so more will demand healthier business travel.

◀ Guests at **KIMPTON'S HOTEL PALOMAR** in Chicago enjoy a rooftop yoga class.



INTERCONTINENTAL HOTELS GROUP will unveil its “all-wellness” brand **EVEN** in 2014 in New York City and expects to open 100 additional properties in its first five years. The brand revolves around pillars of healthy living—eating right, exercising, productivity and rest.



WELLNESS-BRANDED HOTELS

More hotels are now branding (and rebranding) around expanded wellness offerings. A first-mover was Westin (231 global properties) with its multifaceted (and heavily branded) wellness menu spanning everything from its “Heavenly” beds, “Heavenly” spas, SuperFoodsRX menu and “Westin Workouts.” Now on offer: in-room and free-to-borrow workout gear and the “RunWestin” program featuring guided jogs with “Running Concierges.”

And InterContinental Hotels Group is about to take the wraps off its “all-wellness” brand EVEN, revolving around “the four pillars of a healthy life: eating right, exercising, productivity and rest.” According to EVEN, notably, the fitness center is “not an afterthought, but the hallmark of the brand.” EVEN guests will experience things like personalized fitness and food regime scheduling at check-in, wellness experts in the gym—and even clever touches like coat racks that morph into pull-up bars. EVEN’s first hotel opens in Manhattan in 2014, and the company expects 100 properties in development in its first five years. Interestingly, and certainly with an eye to cost, there’s a whole lot of wellness going on, but no spas.

In Europe, with its much stronger, longer history of “healthy hotels,” Aspria is one brand to watch. Launched as a health club business in 2000, the brand recently added four urban wellness hotels (Berlin, Brussels, Hanover, Hamburg) where guests can hit the sports club and spa, while eating healthy food at its “vital lounges.” If the healthy hotel trend involves a key inversion, instead of the hotel having a “spa” and “gym,” the spa and gym essentially now have a hotel...Aspria literalizes the trend.

Environmentally healthy hotels are, of course, central to the trend, as more travelers seek properties taking serious steps to reduce their carbon footprint and water usage. Eco-conscious standouts include UK-based Langham Hotels, India-based Taj Hotels, Asia-based Six Senses Resorts & Spas and U.S.-based Kimpton Hotels. Starwood’s eco-chic Element hotels (13 U.S. properties; expanding in Canada, Germany and Oman from 2013-2016) represent an entirely green-focused brand—and the first mandating that all properties pursue LEED certification. Element recently hit a creative eco-fitness connection by unveiling the first exercise cycles where pedaling charges people’s cell phones and tablet computers.

REBRANDING

Established brands are now re-tooling around wellness. Take Las Vegas’ MGM Grand recently converting numerous rooms into “Stay Well” rooms, packing in 16 health amenities,



WESTIN KA'ANAPALI OCEAN RESORT

VILLAS (Maui), home to Spa Helani, a Heavenly Spa by Westin, feature new “Heavenly” rooms designed to provide guests with a relaxing and rejuvenating experience.

including: personalized spa menus, wake-up light therapy, air purification and aromatherapy, vitamin C-infused showers and wellness videos from The Cleveland Clinic and Deepak Chopra.

Other rebranding examples include Fairmont Hotels & Resorts’ new “Fairmont Fit” program (rolling out to all 80 worldwide properties by early 2013), providing free fitness gear, mp3 players and cruiser bikes—a new, healthy “Lifestyle Cuisine Plus”—with selected properties offering “run clubs” and other group exercise like hula-hooping. Fairmont properties like the Scottsdale Princess (Arizona, U.S.) are taking the health focus even further: Its brand-new, comprehensive “Well and Being” program, directed by the renowned Dr. Tieraona Low Dog, is an integrative medicine lineup spanning everything from acupuncture to cooking classes. Another rebranding move: Healing Hotels of the World launching Urban Healing Hotels for people seeking healthy hotels on city breaks.



The popular Las Vegas hotel **MGM GRAND** is now offering guests "Stay Well" rooms that include revolutionary light therapy to help increase energy and reverse jet lag.

The Vitamin C infused shower water helps promote healthy hair and skin.

FITNESS

Say goodbye to hotel gyms resembling broom closets with a treadmill. Fitness centers are getting vaster, more spectacular, and more are open round the clock. And hotel guests will enjoy more (and more engaging) indoor/outdoor classes and excursions, more in-room workout amenities and more healthy freebies like bikes and pedometers.

The (inexpensive for hotels) "workout in a bag" is catching fire: At select Kimpton, Mandarin Oriental and Sheraton properties, guests can order up gear like yoga mats and fitness DVDs, while many more properties like Affinia Hotels (New York and Washington, D.C.), offer running/walking "tour kits," with iPods loaded with local tours and playlists. Free bikes are becoming common: At London's 45 Park Lane, "bespoke" Brompton bikes are on loan.

In-room wellness amenities are spawning. For example, Westin allows you to book a room with a treadmill or stationary bike, while Hilton Worldwide is now testing "Yoga Rooms" with a dedicated area to practice and mirrors to check poses. And more hotels are partnering with fitness experts to create in-room workout programming, like 45 Park Lane's Matt Roberts-designed fitness programs, which allow guests to continue workouts at home via the hotel's website.

Far more hotels are partnering with local trainers/practitioners to offer classes like daily "boot camps" or "yoga in the yard." Just one example: The Beverly Hills Hotel and Hotel Bel-Air (California) just introduced "Get Fit, Feel Good and Have Fun," designed by fitness guru, Scott Crawford, where guests work one-on-one with coaches leading them through yoga, hikes and horseback riding. The Hotel Palomar (San Diego) is even incentivizing guests to shake a leg: Show them that you've taken 10,000 steps on the pedometer and get 50 percent off your next room.

HEALTHIER FOOD

Finally, more nutritious and customized food/beverage offerings (including gluten-free and vegan menus) are becoming common at hotels worldwide. For instance, Hyatt's new program "Food. Thoughtfully Sourced. Carefully Served." trims portions and uses more organic ingredients, while Kimpton has partnered with expert Joy Bauer to create healthy, in-room meals under 500 calories. Far more hotels are focusing on healthier food for child guests, like Hyatt's new kids menu designed by organic food pioneer, Alice Waters. And while juice-themed "vacations" have been a destination

spa staple, now mainstream hotels like the Four Seasons Biltmore, Santa Barbara (California), are letting guests create their own fruit/vegetable combinations at the centerpiece juice bar, while properties like Travaasa Resorts (Hawaii, Texas) feature juicing classes.

SLEEP HEALTH

The hotel “bed wars” have been waging for years, but now healthy sleep programming is getting more innovative. We’re seeing specially designed rooms with features like high-tech, dawn-simulator alarm clocks and “total blackout” technology, so no light from appliances disturbs sleep. Consider London’s Eccleston Square Hotel...yes, it has famed Swedish Hastens beds, but it also offers Hastens’ “Mind Spa™” relaxation programming, which broadcasts sleep-inducing natural images and sounds throughout suites. Hotel Rio Sagrado (Peru) offers “A Good Night’s Sleep,” where instructors meet guests in their room for sleep-inducing Yoga Nidra and herbal massage sessions.

SPA BURSTS OUT OF THE “BOX”

More hotels are breaking spa treatments “out” across properties, whether in-room or outside (see “Earthing” trend). For instance, The Aayu Mumbai (India), opening in late 2013, reports that all spa treatments will “be unmoored from a fixed location,” and conducted in guestrooms. And more properties, like Four Seasons in Canada, will use “wellness concierges,” who map out guests’ daily wellness itinerary (whether spa, food or fitness choices) to integrate healthy stays.

LOOKING FORWARD

If the new healthy hotels inch towards programming once reserved for destination spas, they also aim to be more approachable, accessible and affordable (not located on a private lagoon reached by seaplane). They’re also clearly not about austerity or mandating health changes, but they do interweave fitness, spa, better food and sleep into meaningfully healthier—if generally shorter—stays.

Not every traveler will embrace the concept, wedded to those endless happy hours and breakfast buffets. But millions globally already demand it, and many millions more will. The health-conscious hotel will become mainstream because, as PKF Consulting’s hospitality expert, Andrea Foster, argued at the 2012 Global Spa & Wellness Summit⁵, vacations and business travel that make people even more unwell are ultimately irresponsible and unsustainable.

Yes, the taglines and trademarks are swirling. Most hospitality brands are on to it, and, in the West, a small war is set to



HYATT’S new philosophy is to have “Food. Thoughtfully Sourced. Carefully Served.”

brew. Skeptics will argue that it’s part marketing “game,” and anyone would be right to say that no brand has executed its full possibilities yet. But competition quickens the competition, and we expect that offerings will only get more meaningful and smarter. (And we also expect more wellness-branded hotel chains to launch, and in markets like Asia.)

It’s still early, but it’s one of the most welcome, wide-ranging hotel trends we’ve seen. And it’s poised to transform the very concept of travel in profound, positive new ways.

¹ WHO data

² Gallup-Healthways Well-Being Index

³ Buck Consultants Global Wellness Survey

⁴ EVEN Hotels-sponsored research, 2012

⁵ 2012 GSWS Keynote: “Our Traveler’s Health: A Matter of Life and Death”



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THE MINDFULNESS MASSAGE...AND MORE

Swedish, Thai, shiatsu, hot stone...make way for “the mindfulness massage” in 2013, a creative blend of two effective approaches—mindfulness techniques and bodywork—that when combined can have a uniquely positive, profound impact on people’s stress levels, emotions and brains. This new massage “mix” addresses the wellbeing of both body and mind, and because it helps people relax more quickly and deeply, it’s a highly desirable solution for anyone who has lain on a massage table, unable to shut off the brain-chatter from the stresses of the day.

Also look for significantly more mindfulness, meditation, positive psychology and mental wellness programming on global spa and fitness center menus next year, in general. Because, as Jeremy McCarthy, director of Global Spa Development and Operations for Starwood Hotels & Resorts, recently, perceptively noted, if the last decade was all about “happiness,” the next will be “all about mindfulness.”¹

FUELING THE TREND

- Modern stress levels are nothing short of insane (and aren’t going anywhere), and people need new coping solutions. Because “the mindfulness massage” combines two powerful stress-fighting weapons, it’s an enlightened massage whose time has come.
- Cutting-edge neuroscience research reveals that ongoing stress-reduction and mindfulness therapies can actually re-wire people’s brains to become less anxious, happier, more focused and even more creative. Neuroplasticity, and what can galvanize positive brain changes, is one hot topic.
- Spas and fitness centers have focused almost exclusively on the body and physical wellness, but now more are realizing their opportunities in mental wellness (and, of course, that the two are always intertwined.) To create stronger guest connections, more spas know they must tackle guests’ emotional/psychological health, provide tools that help them feel, think and act better, and even give their lives deeper meaning.
- Culturally, an interest in mindfulness applications is surging. We hear of mindful eating and parenting, and the bestseller *A Mindful Nation* (by U.S. Congressman Tim Ryan) even argues it would be a great benefit to the U.S. if the practice of mindfulness was taught in schools, the military and in businesses.

◀ **MIRAVAL** (Arizona, U.S.) offers the “Miraval Mindful Massage.” The goal of this signature treatment is to take guests to an intensely relaxing place.

HOW “THE MINDFULNESS MASSAGE” WORKS

Mindfulness, as defined by expert Dr. John Kabat-Zinn (founder of the Center for Mindfulness, University of Massachusetts), is “paying attention in a particular way; on purpose, in the present moment.”

The way spas design their mindfulness massages will likely be unique, as the concept lends itself to an “open source code.” But, essentially, core techniques of mindfulness-based stress reduction will be woven into the massage experience, to help people “get out of their head” so that the full, present power of the bodywork and the mind-body connection can be experienced. Key components: breath work, guided visualization, the “body scan” (where attention is brought to every part of the body and the movement of the therapist’s hands), and other simple, effective techniques that heighten mental and bodily engagement. Even practices like Tonglen, the “breathing in” of the suffering of others and the “breathing out” of happiness towards them, could be adapted.

And, most importantly, this is a two-way symphony directed by a trained-in-mindfulness therapist, who is NOT thinking about how to spend their tip, but is practicing what she is teaching. Not only will the therapist offer guidance on how to take the massage to a new “mindful” level, but she will also need to be 100 percent present, focused and mindful of every action/move she makes.

Examples: Fitness/spa clubs in the U.K. called The Third Space have already been offering “Mindful Massage,” as has One Wellness (Canada) under its “Pathways to Engagement” menu.

And look for some high-profile debuts in 2013. For instance, ever-innovative Miraval (Arizona, U.S.), which brought us hot stone massage, will launch its signature “Miraval Mindful Massage” in January. (Mindfulness has always been at the core of Miraval’s vision, driving programming like The Equine Experience™ and outdoor “challenges.”) Forged by star therapist Wayne Blankenship, Miraval’s new massage will take guests through a guided experience incorporating deep breathing, visualization, grounding to natural elements, thermotherapy, craniosacral therapy and Chi Nei Tsang abdominal massage. As with all mindfulness massages, the goal is to take people to an intensely relaxing place—a far cry from the typical “mindless” lying on a table. Miraval will also teach stress-reduction processes people can employ daily, and its recent book, *Mindful Eating Miraval*, and upcoming one (2013) *Mindful Living Miraval*, will also help bring this mindfulness training home.

THE SCIENCE BEHIND THE MASSAGE & MINDFULNESS MERGE

Medical studies reveal why the massage/mindfulness cocktail could be so potent. Clinical trials show that massage can lead to significant decreases in stress hormones and an increase in white blood cells that fight disease. And the growing scientific literature on mindfulness indicates its positive impact on stress, depression, ADHD, addiction and eating disorders as well as protection against the shortening of telomeres (See trend: “Spa-Genomics”) to forestall cellular aging. (See SpaEvidence.com for the mounting evidence on massage, stress management and meditation.)

Numerous neuroimaging studies show that mindfulness can decrease activation of the amygdala, the brain’s stress response driver, while also enhance activation of the anterior cingulate and prefrontal cortex, known to improve attention and regulate emotion. Ongoing practice can even create positive structural brain change (i.e., neuroplastic transformation). So, with mindfulness + massage you essentially have two discrete forces attacking stress, and a force that empowers cognitive functions like mental concentration and memory, while positively impacting mood.

As Dr. Daniel Friedland, President-Elect of the American Board of Integrative Holistic Medicine and Founder/CEO of SuperSmartHealth, put it: “By integrating mindfulness with massage, clients will not only reduce stress during the treatment, but by engaging in the ongoing component of mindfulness, they may also experience the benefit of brain changes that enable them to become more resilient in coping with stress on an enduring basis.”

MORE MINDFULNESS & MEDITATION PROGRAMMING

Beyond this creative new massage, more spa and fitness businesses will roll out more mindfulness and meditation programming in general. (Whether realized through local partnerships with practitioners, or by bringing meditation and psychology professionals on staff.)

Meditation and mindfulness are, of course, hard concepts to differentiate. One difference: mindfulness can be practiced anywhere, whereas meditation is generally a technique for practicing mindfulness in a more structured setting.

Roughly one in five spas currently offer meditation or mindfulness programming.² And more will launch dedicated meditation classes in 2013, like the Scarlet Hotel (U.K.) or the



MII AMO, A DESTINATION SPA

(Arizona, U.S.), is an industry leader, offering mindfulness training menus like “Integrative Breathing” and “Compassionate Communication” classes.

ONE WELLNESS AND SPA (Canmore, Alberta, Canada) is among the first spas to offer a “mindfulness massage” under its Pathways to Engagement menu. The massage therapist invites her client to “feel one with yourself and your surroundings.”



A guest meditates in the outdoors at **MIRAVAL** (Arizona, U.S.). Approximately one in five spas now offers meditation or mindfulness training. And a University of Pennsylvania study indicated that long-term meditators had higher cerebral blood flow in the brain.

Exhale MindBody spa chain (18 locations U.S. & Caribbean). And more spas will create sequential packages like “Meditation and Massage Journeys,” for example, an hour of each, back-to-back.

And look for more spas to follow leaders like Mii Amo Spa at Enchantment Resort (Arizona, U.S.) with their creation of full-blown mindfulness training menus...from “Integrative Breathing” to “Compassionate Communication” classes.

More spas will put unique spins on mindfulness. For example, the Spa at Colonial Williamsburg (U.S.) offers unique “story” creation meditation. And The Spa at Mohonk Mountain House’s (New York) weight loss program, “Never Diet Again,” utilizes meditation and visualization—and is designed by resident PhD in Psychology, Nina Smiley, co-author of the popular book, *The Three Minute Meditator*, which clearly explains the science behind, and the “how-tos,” for mindfulness practices.

SPAS AS “CREATIVITY” LABS

Neuroscience, again, shows that stress is a top threat to the brain’s “innovative thinking” centers, and that mindfulness and meditation can cause powerful gray matter alterations that improve memory, concentration and other cognitive processes. (One University of Pennsylvania study revealed that long-term meditators exhibit significantly higher cerebral blood flow in brain structures.) So, meditation/mindfulness, essentially, can work to create peak performance thinking and creativity conditions.

That’s probably why some of the hottest business executive coaches are suddenly mindfulness experts. Steve Jobs has been a huge force here: when he passed away the world learned of his Zen “Circle Meditation” practice and the impact it had on his innovation, products and success. There are new books like *The Zen of Steve Jobs* and *Zennovation*, which argues for “an East-West approach to business success.” And news

“By integrating mindfulness with massage, clients will not only reduce stress during the treatment, but by engaging in the ongoing component of mindfulness, they may also experience the benefit of brain changes that enable them to become more resilient in coping with stress on an enduring basis.”

Dr. Daniel Friedland, President-Elect of the American Board of Integrative Holistic Medicine and Founder/CEO of SuperSmartHealth

Expect more positive psychology and mindfulness “touches” throughout spas. Like Starwood Resorts’ (900 properties globally) signature “Heavenly Spa Massage,” where guests select a Hope, Love or Gratitude Stone, and are then guided to think about these meaningful concepts during the treatment. More spas will have inspiring, positive psychology imagery/messages peppered throughout facilities. And more will use tools like gratitude journals, or, like Indian Springs Resort & Spa (California), feature “gratitude trees,” where people hang messages about what they’re thankful for.

MINDFUL FITNESS

More fitness centers will launch mindfulness-based training. For instance, forward-thinking Equinox gyms (55+ locations Canada, U.S., U.K.) have unveiled an entire “Conscious Movement” menu, featuring numerous fitness classes and educational workshops specifically focused on mental engagement, breath work and the “quality” of movement.

articles have reported on how places like the Kannon Do Zen Meditation Center, in the heart of Silicon Valley, are attracting many technology execs and entrepreneurs.

So, while spas have typically been imagined as places where one escapes from thinking and “work,” those that offer stress-reduction and mindfulness menus could increasingly be re-perceived as places where problem-solving and innovation could get accomplished. And while this remains a mostly unleveraged opportunity (and predictive trend), already more spas like Spa Village Resort Tembok (Bali) are incorporating more creativity programming, and using mindfulness techniques like guided meditation to get the juices flowing.

¹ Presentation, 2012 Global Spa & Wellness Summit

² SpaFinder Wellness Research global spa survey, 2012



3

EARTHING

Experts point out that human brains and bodies evolved to thrive in *natural* environments: to chase and be chased, to work the earth, and so on. Now, relatively suddenly, most people are severely disconnected from nature, living in concrete jungles and spending their lives in front of various screens. The fallout: “Nature Deficit Disorder,”¹ a term describing a range of physical and emotional ailments afflicting people cut off from the natural world.

“Earthing” specifically refers to the movement² promoting direct contact with the earth’s electron-rich surface (walking barefoot, etc.) as foundational for health. The claim: “grounding” the body to the earth’s surface stabilizes our natural electrical rhythms and reduces disease-causing inflammation, while also providing pain relief, fostering healthy sleep and serving as a natural blood thinner (good for the heart).

While we anticipate more of the practice/language of “earthing” at spas, we expect to see far more “nature grounding” in its wider, more metaphorical sense. Spas are busy devising creative, soul-stirring ways to re-immerse clients in nature: from magical treetop massages, to “tented” spas erected in raw wilderness. Think: less piped-in nature *sounds*, and more real *nature*.

FUELING THE TREND



By 2013, there will be
5 billion urbanites worldwide.



- Growing medical evidence indicates that getting out in nature, and synched up with natural cycles, doesn’t just deliver spiritual benefits, but also keeps our brains, bodies and nervous systems in working order. For instance, sunlight-provided Vitamin D is necessary for brain health, and our sleep and other circadian rhythms depend on the natural light of day and darkness of night.
- The world is experiencing the largest global exodus from rural areas to cities in history. In 2008, for the first time, more than half the world population became city/town dwellers. And by 2013, the number will skyrocket to 5 billion people³ geographically cut off from nature.
- With people working longer hours than ever, and new, digital technologies defining every aspect of our lives, we are tethered to cell phones, computers and tablets almost every waking hour, and flooded with (stressful) information.



AL FRESCO TREATMENTS AND CLASSES

If spa and fitness experiences have typically been staged in windowless rooms, now they're being pushed "out" into the great outdoors. Poolside, in-the-forest and on-the-beach massages/treatments are surging. And far more "stay" spas are offering nature outings like hiking, rafting and horseback riding—or just some simple stargazing. Outdoor fitness is also on the rise at both spas and gyms, from boot camps to outdoor equipment and circuits.

The examples are endless. More spa resorts (climate permitting) are taking an inside-out approach to design, like Maradiva Villas (Mauritius), where the walls between the guest rooms and spa and the outdoors dissolve, or at Sublime Samana (Dominican Republic), where the beach spa is seamlessly woven into the natural environment. Far more spas are offering al fresco yoga, like the new Sarana Spa at the Sharon Hotel's (Israel) beachfront classes, or Isla Palenque resort's (Panama) jungle yoga and fitness. And far more spas offer outdoor treatment gardens, like Monastero Santa Rosa Hotel & Spa (Italy). Rancho la Puerta (Mexico) has been a pioneer in keeping its guests close to the earth since it opened (1940), when people slept in tents. Today the accommodations are luxe, but the menu is packed with hikes and diverse outdoor exercise classes—and many guests opt to work the earth in their bountiful fruit and vegetable gardens.

Enchanting, rustic-chic new "treehouse" spas are a hot sub-trend as well. A few examples: Tree Spa at Hidden Pond resort (Maine, U.S.), Petit Vincent (St. Vincent island) and the brand-new Salamander Resort & Spa (Virginia, U.S.). At Omni Amelia Island Plantation (Florida, U.S.) the up-in-the-trees trend is played out in their over-water yoga treehouse.

Consider the stunning ocean-nature immersions at the new Niyama Resort (Maldives) with its underwater lounge and floating restaurants, overwater and private garden spa treatments, its own marine biology lab, and group snorkeling trips enlightening guests about the underwater ecosystem.

The brand-new Ritz-Carlton Dorado Beach (Puerto Rico), one of the brand's 20 "Reserve" properties to be created in remote, unspoiled natural locales, hits numerous spa-nature design notes. Guestrooms feature floor-to-ceiling sliding doors opening onto the beach, and its Spa Botánica (located in a vast botanical sanctuary) includes glass-walled treatment rooms set in gardens, with out-in-the-wild showers and soaking tubs—and a treehouse, where treatments take place on a platform jutting out into the forest canopy.

Even the climate-challenged are getting creative with nature-immersive design. For instance, guests at Uma Spa at the Tierra Patagonia Hotel (Chile) can take in the awesome views of the glacier lake from the outdoor whirlpool ringed with glass to protect against the region's powerful winds.



ISLA PALENQUE, AMBLE RESORTS

(Panama) encourages guests to connect with nature by offering spa treatments in a shady palm grove.



At the TIERRA PATAGONIA HOTEL

(Chile) guests are offered outdoor excursions and are surrounded by nature even when indoors.



A guest at the **GOLDEN DOOR AT EL CONQUISTADOR RESORT** (Puerto Rico) connects with the earth as she walks in a labyrinth at the spa.

URBAN NATURE

More urban day and hotel spas (that have their own logistical “nature-deficit”) are working to get people out into fresh air. Consider the upcoming Parkroyal at Pickering hotel-spa-in-an-urban-garden concept (Singapore), a high-rise nestled in 15,000 square meters of vegetation. In Manhattan, CLAY fitness/spa center has added a new yoga roof garden, while the new Red Door day spa just reopened in a new location with an expansive spa roof deck. There are also more rooftop gyms at urban hotels, like the new “Skycourt” at the Grand Hyatt Denver, featuring an outdoor jogging track.

Hotel spa design is also increasingly thrusting nature “in.” Examples include the indoor vertical gardens at Westin properties or at the Fairmont Scottsdale Princess (Arizona, U.S.).

BAREFOOT SPAS

Expect more earthing-friendly “barefoot” spas, like the new El Secreto (Belize) or the soon-to-open Mukul (Nicaragua’s first luxury spa hotel), and more “pro-earthing” experiences like the Golden Door Spa at El Conquistador Resort’s (Puerto Rico) new barefoot, candlelit labyrinth meditation walks held during full moons. In addition, we’ll see more all-inclusive “island without cash” concepts like Centara Grand Island Resort & Spa (Maldives)...because suddenly “no shoes, no money” is the new luxury.

RAW WILDERNESS SPAS

Look for more “pop-up” or tented spas like the just-opened The Moat (Wales), with its sauna tents and tree “cocoons” erected on the woodland moat of a 13th-century castle, or Four Seasons Tented Camp, Chiang Rai (Thailand), set in a bamboo jungle.

More spa resorts will offer wilderness safaris. At El Silencio Lodge and Spa (Costa Rica) each suite is assigned an “eco-concierge” that leads excursions into the tropical cloud forest, where guests do tree planting and learn about the exotic wildlife. At Wolgan Valley Resort & Spa (Australia) wildlife safaris plunge guests into the property’s 4,000 acres for some kangaroo and platypus spotting.

More spa resorts will continue to spring up in government-protected nature preserves, like O’Reilly’s Lost World Spa (Queensland, AU), located in a World-Heritage-listed National Park. Four Seasons is a leader here: at their Resort Langkawi’s Geo Spa (Malaysia), set in a UNESCO-protected Geopark, all experiences are devoted to “harnessing nature’s energy,” and there is tree-hut yoga, villas open to mangrove forests, and jungle treks led by staff naturalists. At their new Safari Lodge Serengeti, built in a Tanzanian national park, guests watch elephants drink from an active watering hole while swimming in the infinity pool.

DIGITAL DETOX

People are so overwhelmed by their 24/7 technology connections that “digital detox vacations” have been a trend for some time, as recently noted by Euromonitor.⁴ Hotels like The Westin in Dublin or The Quincy Hotel (Washington, D.C.) represent urban properties that have offered these “unplugged” respite. But properties report that people most successfully cut the cords when they throw themselves into intensive physical activities like nature hikes, yoga and frequent massages. And that’s why “digital detoxing” is a rising trend specifically at spas and other fitness-focused hospitality



The Golden Eagle Treehouse at the **PRIMLAND BLUE RIDGE MOUNTAIN RESORT** (Meadows of Dan, VA) gives guests an unique lodging experience.

businesses. For instance, “The Digital Detox” is a travel website that arranges trips to Californian hot springs and Costa Rican jungles, where people relinquish all their various “pods” with the help of an immersive program of yoga, meditation and hiking. And Via Yoga, which specializes in luxury surfing and yoga retreats in Mexico and Costa Rica, offers 15 percent off for guests that check their iPhones at the “door.”

EXTREME SPA-NATURE

Our extreme Nature Deficit Disorder also seems to be sparking some extreme spa and fitness “nature” concepts.

The “locavore” and “slow” food movements have been around, but a hot, new trend is foraging for the food you eat and the things you consume. (Proponents point out that humans began as gatherers—then became hunters/farmers—and then just passive consumers.) The foraging trend is just hitting spas, and these new scavenger hunts certainly make the “old” farm-to-table trend feel tame.

Examples: at Umstead Hotel & Spa (North Carolina, U.S.) ice cream is made with guest-found pine needles, while at Sorrel River Ranch Resort & Spa (Utah, U.S.) 160 acres of wilderness are foraged for both food and spa treatment ingredients. Verana in Mexico’s staff also grows or forages for all the raw ingredients in its treatments, from bananas to herbs.

And this “paleo” or “caveman” movement is hitting the fitness world. For instance, “wild fitness” holidays are rising, like

Wildfitness™, which takes people to Kenya, Andalucía and the Isle of Wight to introduce them to “Wild Eating,” “Wild Moving” and “Wild Living” programs, to restore their bodies/minds to a more natural, “pre-processed” state.

Extreme spa-nature is being played out in design. For instance, Switzerland’s Gstaad Palace now offers an “Igloo Experience,” where guests stay/spa in a suite made of ice and snow set high in the Alps. At Wellness, Backstage Hotel Vernissage (Switzerland), extreme high-tech conjures nature: seven treatment “cubes” represent the seven days of earth’s creation, and beach-and-sun-deprived guests can loll on infrared-heated glass pearls while gazing up on a virtual “summer’s day” sky.

Consider the eco-minded floating spa, “Floating Gardens,” planned for a lake near Amsterdam in 2014, which will be coated in vegetation so that the spa “breathes oxygen.” Another floating spa-hotel called Krystall is also in the works in Norway, and this ice-crystal-shaped, spa-and-wellness-packed “property” will drift among the fjords, and will be hyper-focused on sustainability.

From fresh-air fitness to foraging, look for this “earthing” trend to connect more spa-goers with Mother Nature in even more creative ways...in 2013 and beyond.

¹ Written about/identified by Richard Louv in “The Nature Principle.”

² Pioneered by Clint Ober, Founder, The Earthing Institute; co-author of “Earthing.”

³ United Nations Population Fund data, 2012

⁴ Euromonitor’s WTM Global Travel Trends Report, 2012



4

GENOMICS & SPA (...TELOMERES & BEYOND)

Human beings have 30,000 genes and a three billion-letter DNA code. And the future of medicine is mining that byzantine information to identify new, breakthrough medical approaches, and to support a new age of more predictive, personalized—what is being called “precision”—medicine specifically grounded in an individual’s unique genetic profile. Genomic science and testing is moving fast: The first human genome sequence was only completed a decade ago, but *Scientific American* recently argued it wouldn’t be long before doctors could offer individual genome sequencing for roughly US\$1,000.

Genomic testing ushers in a new, science-based foundation for more precise preventative medicine, and is poised to increasingly provide people with genetically grounded roadmaps for how they might live better and longer. So, you can see how this wider medical breakthrough intersects with the prevention—and lifestyle-regime-changing-focused spa and wellness industries.

◀ Telomeres are the protective caps of our chromosomes. Numerous medical studies reveal that many services spas provide, such as stress reduction, exercise and healthy eating, are associated with preventing the shortening of telomeres, which could forestall disease and early death.

Personal genomic testing remains in its relative infancy. But some destination and medical spas and fitness businesses are already jumping in, offering diverse genetic tests like Nutrigenomic testing (to identify the best eating strategies), fitness-focused tests (to identify a person’s best training/workout protocol) and telomere testing (to gauge a person’s “true” cellular age, and more).

As tests get easier to administer (saliva-based), more spas will offer them, and more will partner with medical professionals to provide authoritative analyses of results and ensure the right “prescriptions” for lifestyle change. Even if a spa never offers genomic testing, the industry stands to be increasingly, positively impacted by what some of the genomic science, like telomere research, reveals about the impact that stress-reduction, exercise, healthier eating and so on, can have on forestalling disease and early mortality. As that science gets broadcast, spas/wellness businesses may then be re-perceived as scientifically proven anti-aging and life-extending “centers”...a powerful validation and potential business driver.



A scientist analyzes chromosomes of a human being. Genomics, the study of genomes, is being used to support a new era of predictive, personalized medicine.

A physician consults with a guest at **CANYON RANCH** (Tucson, AZ). The spa offers a range of genomic tests including analyzing conditions caused by lifestyle.



FUELING THE SPA-GENOMICS CONNECTION

- Genomic science is medicine's future and will ultimately impact all health/wellness businesses.
- The real power of personal genetic testing is not to paralyze people with a printout of their immutable "genetic destiny," but to conduct those genomic tests that can support preventative action...exactly what spa/wellness businesses do.
- Genetic testing should prove a uniquely motivating weapon to get people to commit to, and stick with, more positive lifestyle changes.

TELOMERES

Scientists have identified numerous genes associated with bodily systems that can be positively altered by lifestyle changes, but perhaps no genomic breakthrough holds such profound implications for the spa/wellness/fitness industry than telomeres. Telomeres are the protective caps of our chromosomes, and numerous clinical studies (pioneered by Nobel Prize winner, Dr. Elizabeth Blackburn) reveal that they become shortened/damaged by natural aging and by unhealthy behaviors. Causal links and associations have been identified between shortened telomeres and cancer, diabetes and depression, along with cardiovascular, inflammatory, infectious and fibrotic diseases.

There are over 10,000 scientific publications relating to telomere biology and aging or disease. One Duke University (U.S.) study revealed that children exposed to stress and trauma (bullying, witnessing domestic violence, etc.) showed rapid telomere erosion. A Brigham and Women's Hospital study (Boston, U.S.) showed chronic stress (like phobias) led to shorter telomeres. A German study reported that middle-aged people who were dedicated runners had longer telomeres than those who were sedentary. And a just-released, major study (conducted by Kaiser Permanente, the University of California, San Francisco, and National Institutes of Health), which analyzed the telomeres of 100,000 patients, found that those with short telomeres had a significantly higher risk of death in the three-year, follow-up period, and that behaviors like smoking and heavy alcohol consumption were associated with shorter telomeres, while moderate exercise was linked with longer ones.

Telomeres, notably, are a malleable part of our DNA. As Dr. Elizabeth Blackburn, Nobel Prize winner and co-founder of Telome Health, Inc., recently put it,¹ "Telomeres are one of

the few parts of the genome that can be changed by lifestyle choices, and hence, telomere length measurements can provide valuable feedback on one's disease risks and, potentially, the effects of lifestyle changes."

Studies, as noted, are mounting that exercise, healthy food, better sleep and stress-reduction practices like meditation are linked to preventing telomere shortening. And given that that is exactly what spas/fitness centers "do," it's logical that they could be perceived as "telomere health centers" of the future.

Telomere testing is just emerging, and given its wide-ranging health implications, one might say, move over, cholesterol test. Three companies across the globe now provide telomere testing, and destination and med spas have been industry first-movers in offering it, as it's been a blood test that had to be performed by a medical professional. For instance, telomere testing is now a key offering within SHA Wellness Clinic's (Spain) anti-aging program, and, along with a battery of other diagnostic tests, allows SHA doctors to shape the right, personalized behavior change.

It has only been a blood test, but Telome Health, Inc., which offers the TeloTest™, has announced it will launch the first saliva-based telomere length measurement test in first-quarter 2013. Because this non-invasive kit makes it possible, essentially, for anyone to administer the test, one would expect many more spa/wellness businesses to ultimately get on board. One critical, logical usage of the test for spas/fitness businesses would be to provide periodic testing to assess the effect that specific healthier regimes have on a person's telomere length over time. Hence, telomere testing could forge longer-term, more meaningful, client connections. Telome Health, Inc., also noted that further tests, like those measuring the percentage of short telomeres in a person, are slated to follow.

TESTING BEYOND TELOMERES

Other genetic tests intersecting with spa/wellness businesses are proliferating. For example, DNA-driven weight loss is a hot topic, given studies like Stanford University's,² indicating that people who embrace diets tailored to their genetic type lose twice as much weight as those who don't. Pathway Genomics offers a new (saliva) test, testing 80 genetic markers to identify how individuals process fats, carbs and proteins, to then recommend specific diets.

Gyms/fitness centers are also just beginning to use DNA testing to support trainer-prescribed exercise regimes. For instance, "E," the private training centers within Equinox gyms in L.A. and New York City (Equinox has 56 locations globally), works



THE SHA CLINIC, at **THE SHA WELLNESS CENTER** in Villa de Altea, Spain, is an early spa-mover in providing telomere measurement testing; results are then used to diagnose the biological age of the guest. The analysis helps the clinic staff determine the most effective personalized treatments and recommend corresponding changes in lifestyle and nutrition to improve the patient's state of health. The goal is to cut down on the percentage of shorter telomeres and add years to life expectancy.

A simple cheek swab test can help determine the likelihood of getting arthritis.



with the company Existence Genetics to offer simple cheek swab tests, examining things like whether “endurance” or “power” is your best fitness bet and your likelihood of getting arthritis. This certainly takes “personal” training to a whole new level.

UK-based XRGeneomics, headed up by Loughborough University researchers, recently released a test gauging how unique individuals will benefit (or not) from aerobic exercise, heralded as the most precise test of its kind heretofore. Most common fitness-focused DNA test-kits only test one marker, while XRGeneomics’ analyzes 20.

The U.S. destination spa Canyon Ranch has diverse genomic tests on its menu, from those analyzing common conditions impacted by lifestyle, to Nutrigenomics, an emerging science measuring the potential influence of food and nutrient supplements on genetic expression to identify smarter eating strategies. And while not genomics-based, its medical director’s (Dr. Mark Liponis) new book, *The Hunter/Farmer Diet Solution*, outlines how, through diagnostic lab tests and body type analysis, people can be genetically identified as either a “hunter” or “farmer,” indicating whether low-carb or low-fat is the best weight loss plan.

Spas are all about custom skin analyses, so expect more DNA-beauty connections ahead. One example: Kempinski Hotel Giardino di Castanza’s (Sicily) “DNA Spa” offers the SKN+LIFE test, designed to better pinpoint how a client’s skin is susceptible to aging, oxidation, elasticity loss and so on—and underwrite a more science-based skin routine.

Hundreds of genomic tests are now being directly marketed to consumers. For example, there is U.S.-based 23andME, a personal genomics testing company headed up Anne

Wojcicki, wife of Google founder, Sergey Brin, which just raised another US\$50 million in VC funding. 23andME just lowered the cost of its Personal Genome Service to US\$99 in a quest to reach one million users. Its saliva-sample test not only helps people trace their ancestry, it measures their risk for 119 conditions, including breast cancer, Parkinson’s disease and diabetes.

Skeptics will very rightly argue that personal genomic science/testing is in very early days—that many tests are far too rudimentary to have any meaningful predictive powers—and too many false promises abound. But it’s also indisputable that serious breakthroughs are happening fast. And, to cite just one example, with companies like Telome Health, Inc., some of what is already happening is very much real science and not “science fiction.”

Spa and fitness businesses are now just tiptoeing into incorporating genomics testing, a potentially powerful, new tool to galvanize people to adopt healthier behaviors. And with the science still evolving, it remains a largely predictive trend.

But evolve it will. And as diverse genetic tests that isolate specific conditions or individual tendencies that could be positively impacted by lifestyle changes get more advanced and accessible, spa/fitness businesses are really in a unique position...because, while doctors are, of course, the experts at diagnosis and prescribing healthy changes, these businesses are in the daily business of actually supporting them.

¹ Press release: “Telome Health Plans Launch of TeloTest™, a Novel Wellness Biomarker Based on Telomere Length,” 11.28.12

² Collaborative clinical study between Stanford University and Interleukin Genetics, Inc., 2010



5

AUTHENTIC AYURVEDA AND OTHER ANCIENT REVIVALS

Spas have always broadcast the ancient pedigrees of their healing practices, whether hydrotherapy circuits originating in ancient Rome or millennia-old yoga traditions. Too often, however, a “lite” version got served up (a few Ayurvedic touches here, a steam room dubbed a “hammam” there). And, typically, all this venerable ancientness got played out in a modern, blandly beige space.

Change is coming: Expect more aggressively authentic and comprehensively executed global wellness experiences—a distinctly “ancient” look, feel and language, and a more expansive, exotic menu of wellness traditions explored—at spas.

FUELING THE TREND

◀ A woman receives a traditional treatment at the **KAIRALI WELLNESS CENTER AND SPA** (New Delhi, India). Ayurveda, which was born in India, combines a holistic system of medicine with a complete philosophy of healthy living.

- Spa-going has become mainstream, and while many people have now experienced a handful of wellness traditions (Thai massage, yoga, etc.), they want more, and they also want to dive further into them. As industries mature, services and products always proliferate and become deeper and more serious.
- This desire for more authentic, ancient wellness has also been quickened by our Internet Age, which has made a World Wide Web of traditions instantly explorable.
- The rise of a global diaspora of Chinese, Korean, Indian, Thai and Eastern European, etc. populations means these traditions can be more readily, meaningfully executed.

While this trend dovetails with the “indigenous” spa trend SpaFinder Wellness named for 2011, it’s not confined to the “local”—it’s as much about global exportation, and experiencing traditions “everywhere.”

MORE “PRESERVATIONIST” AYURVEDA

No better example of the trend exists than what's happening with 3,500-year-old, Indian-born Ayurveda. Derived from the Sanskrit words, “Ayus,” meaning life, and “Veda,” meaning knowledge, Ayurveda is a complex, holistic system of medicine and a complete philosophy of healthy living. Ayurvedic doctors identify imbalances in a person's “doshas” and prescribe a personalized, detoxing and rebalancing regime of diet change, exercise like yoga (based on a person's “prakti,” or constitution), mental discipline regimes like meditation, healthy sleep, regular massage and herbal medicine.

High-profile advocates like Deepak Chopra, and high-profile collaborations between Ayurvedic organizations and esteemed western medical centers like the National Institutes of Health, have helped fuel Ayurveda's growing popularity. And, most critically, it's the growing acceptance in the global medical community (and by more people generally) that the mind-body link—and preventative health approaches like a better diet, more exercise and less stress—are the keys to forestalling disease and true wellbeing.

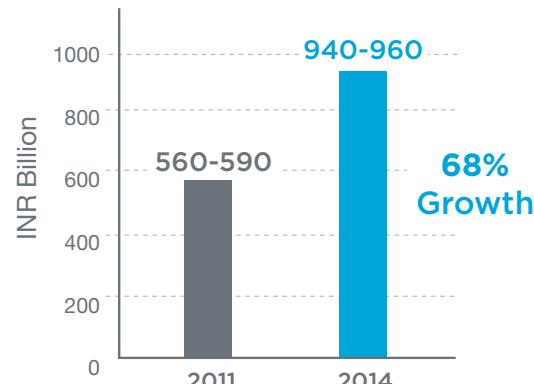
But while authentic Ayurvedic medicine integrates the numerous components listed above, it's often consumed outside India in piecemeal form: as yoga and/or meditation, or in relaxing (photogenic) treatments like shirodhara, the pouring of oils on the forehead.

Now look for deeper, more authentic programs, overseen by Ayurvedic doctors to take off, both at new Indian spas and worldwide. Expect more programs with the whole Ayurvedic “package”: pulse and dosha analysis by a qualified practitioner; Panchakarma, a multi-week detox; dietary recommendations and coaching (so people can make healthier eating a daily reality); and mind-focused “Satwa Vajaya” approaches, like yoga and meditation, that strengthen what we in the West call willpower.

We use the word “authentic” throughout this trend with caution. After all, it's always a hotly contested concept and ever-moving target, given the unerasable forces of history and globalization. For example, Maharishi Ayurveda, forged in 1980, and the system behind highly regarded, intensive Ayurvedic centers like The Raj (Iowa, U.S.) or Bad Ems (Germany), was once accused of being “Flower Power Ayurveda” softened for the West. Perhaps it's better to state that more new programs will strive to “preserve” Ayurvedic medicine in its original form.

India's government is putting muscle behind its wellness tourism (clocking 22 percent growth annually¹), and with Ayurveda a campaign centerpiece, more people will travel to experience the “real deal” in its homeland. World-renowned Ayurvedic players like Ananda in the Himalayas and Soukya have attracted international guests for years (Camilla Parker-Bowles is a long-time Soukya patient). And now, more new, luxe Indian spa resorts will continue to make these more hardcore programs (involving distinctly un-pampering elements like purgatives) help the “medicine” go down.

Growth in Indian
Wellness Industry



Examples: The new Banyan Tree Spa Kerala houses the brand's first doctor-led Ayurvedic Centre. Iconic Indian hotel brand Taj is busy opening Jiva Grande spas at properties like Taj Madikeri (India) or Taj Exotica (Maldives) with elaborate, “purist” Ayurvedic menus. Bangalore-based hospitality group Windflower Resorts & Spa is opening projects like its high-end Kasaragod property for those seeking Ayurvedic medicine in a spa environment.

Watch for the opening of Vana in 2013, a stunning 21-acre wellness and Ayurvedic destination set in the Himalayan forest. With Vana's team of doctors, 7-, 14- and 21-day Panchakarma detox programs and rich spa menu, it's poised to quickly become not only the most talked about new star in the Ayurvedic world, but also one of the most talked about destinations on the destination spa scene, period.

More authentic Ayurveda is also rising worldwide...

Examples: Mandarin Oriental properties like Chang Mai (Thailand) and the new Galo Resort Sport Hotel's (Madeira) Ayurveda Cure Center. Even day spas are part of the trend, like London's Ayurveda Pura, with its Panchakarma retreats (featuring Ayurvedic meals, herbal medicine, daily massage



Situated on the West Crescent of Palm Jumeirah, the **JUMEIRAH ZABEEL SARAL** (Dubai, United Arab Emirates) is a tribute to the ancient palaces of the Ottoman Empire. The palatial spa combines the ancient healing philosophies of the Ottomans with modern-day spa technology and luxury. It also features an authentic Turkish hammam and spa. For centuries hammams have been a traditional gathering place for relaxing and celebrating special events.

The GEO SPA AT FOUR SEASONS RESORT LANGKAWI

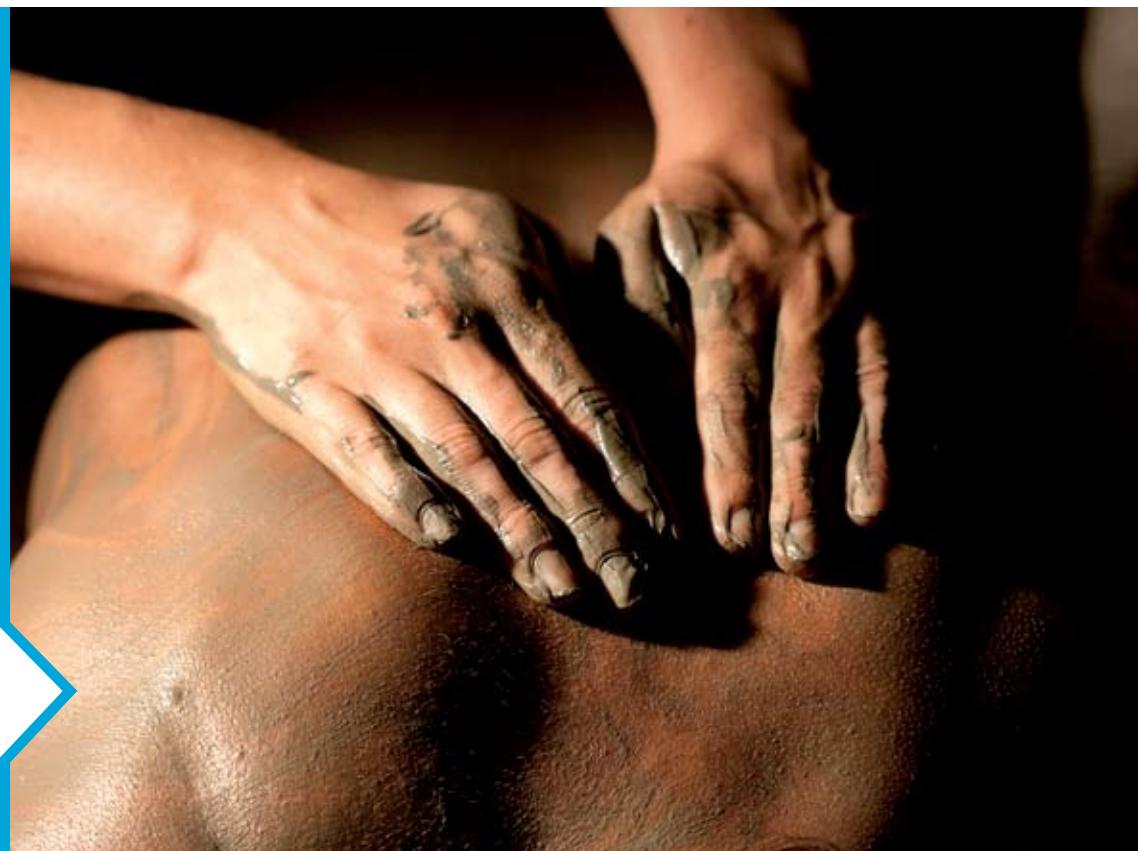
(Indonesia) is an example of both the 2013 “Earthing” and “Ancient/Authentic” trends. Visitors to the spa experience the ancient energies of Langkawi’s UNESCO Geopark and bespoke natural treatments, inspired by the properties of nourishment, water, light and air. Langkawi’s Geopark is 550 million years old, the oldest land in Malaysia. The spa honors the healing stillness and indigenous benefits of a protected natural environment.





Located in a former nunnery, the **NUN ASSISI RELAIS & SPA MUSEUM: ASSISI** (Italy) offers a Roman bath circuit dug deep within a former first-century Roman amphitheater. The spa also includes a hammam and an ancient cistern.

A guest enjoys an "Ancient Massage" at the Nun Spa Museum.





and personalized yoga and mediation classes.) It also runs an academy that trains practitioners.

And in general, we'll see more spas incorporating Ayurvedic elements/treatments, which can be valuable even if they're not full-blown medical programs. A couple examples: the brand-new Gstaad Alpina Hotel and Spa (Switzerland) with its Ayurveda room, and the Thann Sanctuary Spa at the Castle Hotel & Spa (New York, opening 2013) showcasing Ayurvedic massages.

OTHER ACCENTS ON THE ANCIENT

Ayurveda is but one "ancient" that will experience a strong revival. Look for more authentic Roman and Turkish baths, Russian banyas, Traditional Chinese Medicine (TCM) and Nordic offerings...and some novel healing traditions sure to be new to us all, in spaces with unique, "ancient-hip" designs, or built on ancient spa sites or within reclaimed historic buildings. The trend towards adaptive reuse with new spa properties (i.e., more popping up in historic buildings), is not only generally cost-effective and more environmentally sound, it resonates with a spa-going demographic that embraces cultural, experiential travel and hyper-local experiences.

The new Aire Ancient Baths (Manhattan) epitomizes "the new Roman" with its ancient design cues like candlelit interiors dominated by Romanesque columns and an authentic tepidarium through frigidarium circuit. (Aire also runs three Arabic baths in Spain, with Aire de Almeria built on the site of a 15th-century Arabic souk.) At the sleek, new Spa Museum, Nun Assisi Relais (Italy) a Roman bath circuit is dug deep within a former first-century Roman amphitheater.

More traditional Russian banyas (with their invigorating, birch-twig-thwacking venik experiences) are opening, like Bear and Birch (New Jersey) or the new Archimedes Banya (San Francisco), which is essentially a "multicultural" East/West bathing mecca.

The hammam trend SpaFinder Wellness identified a couple years back is exploding. Roughly one in three of the top, new global spas gracing *Condé Nast Traveler's* "2012 Spa Hot List" showcase a serious hammam, from Caudalie Vinotherapy Spa at L'and Vineyards Resort (Portugal) to ESPA at the Resorts World Sentosa in Singapore (the country's first). Another bright new Turkish bath star: the massive Talise Ottoman Spa (UAE), with design dripping "Ottoman Empire at its height." As well, Moroccan traditions are not being forgotten. Just one example: London's suave, new Spa at Dolphin Square specializing in authentic Moroccan hammam and rhassoul rituals.

More authentic TCM at spas is happening, at properties like Mandarin Oriental's Hainan and Sanya (China) resorts (with their onsite TCM doctors), or at LeFay Resort & Spa (Italy). And Scandinavian approaches are getting some new ancient-based rethinks, like the new Liv Nordic brand with its wellness experiences expressly based on "Nordic culture."

More ancient healing systems from every corner of the globe will increasingly get explored. For instance, Brazil's exclusive, new Botanique Hotel & Spa, the first "100 percent Brazilian spa," is centered on Afro-Brazilian and Native Indian healing rituals. At the So Spa at Sofitel's Old Cataract Hotel (Egypt), Nubian massages are the star, while at the Kerry Hotel Spa (Shanghai), massages based on the ancient Chinese martial art, wudung wushu, take the spotlight.

Ancient and historically authentic...it's the new spa-modern.

¹ PWC data, 2012



6

COLOR SELF-EXPRESSION

Beauty has taken a bold, theatrical turn of late, with the old “Barbie-doll prettiness”—a “healthy glow,” natural highlights, a dab of lip gloss and a French manicure—under radical revision. In 2013 the envelope-pushing trend will only intensify. And from hair to nails, this beauty “self-expression” wave will get most intensely played out around COLOR.

Yes, dramatic color has been surging, but despite predictions that it will surely wane, it looks to be an irrepressible, endlessly self-reinventing force. So, look for even more color washings of hair and face (in in-your-face shades)—more body art hitting bodies of every gender and age (even performed at new “tattoo spas”)—and technicolor nail designs as painstakingly rendered as the Sistine Chapel’s ceiling. Subtler aspects: a powerful rise in skin brightening and lightening products and treatments.

◀ Fueled by easily “applicable” (and affordable) hair and makeup lines and a celebrity-driven culture, color self-expression is growing at a frantic pace. This envelope-pushing trend will only intensify as cosmetics and hair color, in once unimaginable hues, are made available.

FUELING THE TREND

- Color is easily “applicable,” and given the ongoing tough economy, a whole lot of self-transformation can get painted on for relatively few bucks.
- With a brutally competitive, global celebrity culture (out-Gaga-ing each other), new color-fashion headlines spawn daily. If all this playfulness in color speaks to the age-old, boredom-fighting desire for the new, that desire is now being whetted at a frantic pace.
- Beauty trends are increasingly emerging from the street and young generations (as well as globally via social media/blogs) vs. runways or glossy magazines.
- The trend illustrates what seems to be a new cultural comfort with pure artifice: using all the tools and technology available to become any person (with any color skin or hair) you want...even if it's not a real “person,” but, say, *Hunger Games'* all-pink-violet Effie Trinket.

The trend pushes mere makeup or manicures to the status of self-as-art, where hair, face, body and nails are easels for creation. The last line of Stephen Sondheim's "Sunday in the Park with George," "A blank page...so many possibilities," neatly encapsulates it. And spa/beauty businesses and brands are expanding their own possibilities: If they have typically led with the "natural," more now have their ear to the street, and are embracing these diverse, lucrative color art services.

THE HAIR RAINBOW

Hair once meant blonde, red or brown, but the recent color shake-ups will keep ramping up. Ombré, or "recession hair," moving from dark roots to light ends, has been around, but is constantly evolving to include gradations to blue, pink, purple, you name it; while dip-dyed ends and clip-in extensions in rainbow and pastel shades are also big. And it's not just for the young: 79-year-old American comedienne, Joan Rivers, for one, recently rocked pink highlights.

Expect every permutation to get flipped on its head (and then again): Like reverse ombré, with wild root color gradating to natural ends. Expect more hot products like hair chalking, which comes in every shade and allows for instant, temporary color transformations. And look for even more extreme colors and products from trendsetting companies like MANIC PANIC™ (New York)—and for far more spa-salons like Hush Hair and Beauty (U.K.)—to serve up this new "hair painting" next year, in colors/techniques once unthinkable.

THE FACE FRONT

On the cosmetics side, expect far deeper, more radical pigment, showing up in unexpected places: whether jewel-tone, neon or peacock-hued eyelashes; blue, purple, red and emerald (Pantone's 2013 "Color of the Year") eye shadow/liner; or intense pink and orange lips. Makeup based on the vibrant colors of India is rising: Chanel and Clarins recently launched Indian-inspired lines, the latter releasing its own "kajal," a heavily pigmented, creamy eyeliner that Indian women have worn for centuries. And if brands like Illamasqua and MAC have been long-famed for their edgy pigment-play, now spa brands like Mineralogie or La Bella Donna (more known for natural neutrals) are incorporating more out-there color.

BODY & FACE ART

Body art has become a mainstream beauty market, and tattoos are essentially a rite of passage for young urbanites. (Consider: Roughly one in three Americans aged 18-25 have tattoos, and roughly one in three people overall in the U.K. do as well, including 67-year-old actress, Helen Mirren.) Once carried

out in sketchy backroom "parlors," we'll now see more combo haute spa/body art studios, and more spas with body art on the menu. One example of the new "tattoo spas": Friday Jones at Senses NY Salon & Spa (Manhattan), run by a "couture" tattoo artist with a heavy celeb clientele. On offer: A massage before your inking, painlessness guaranteed by vicodin and anesthesia (they have partnered with a doctor) and new designs like subtle, white tattoos. Temporary and henna tattoos will keep raging, especially with teens, at more spas like Grand Wailea and Aulani Resort (Hawaii, U.S.).

Body art is also innovating beyond big-commitment tattoos. For instance, there is the new "face lace" pioneered by U.K. makeup artist, Phyllis Cohen: applique-stickers creating a delicate tattoo effect. Christian Dior recently released 24-carat temporary gold tattoos simulating jewelry, while Violent Lips/Eyes has rolled out lip and eye transfers in glitter, animal, floral and fishnet patterns.

SKIN TONE CONTROL

Taking control of your skin tone is a major (if much subtler) global trend. For one, concerns about skin-cancer-causing tanning mean more people will opt for the pale look, or choosing spray tanning over tanning salons. For instance, in the U.S., tanning salons have recently clocked negative growth, whereas spray tanning is one of the ten fastest-growing industries.¹ And many more countries are regulating—or like Brazil, banning—tanning beds.

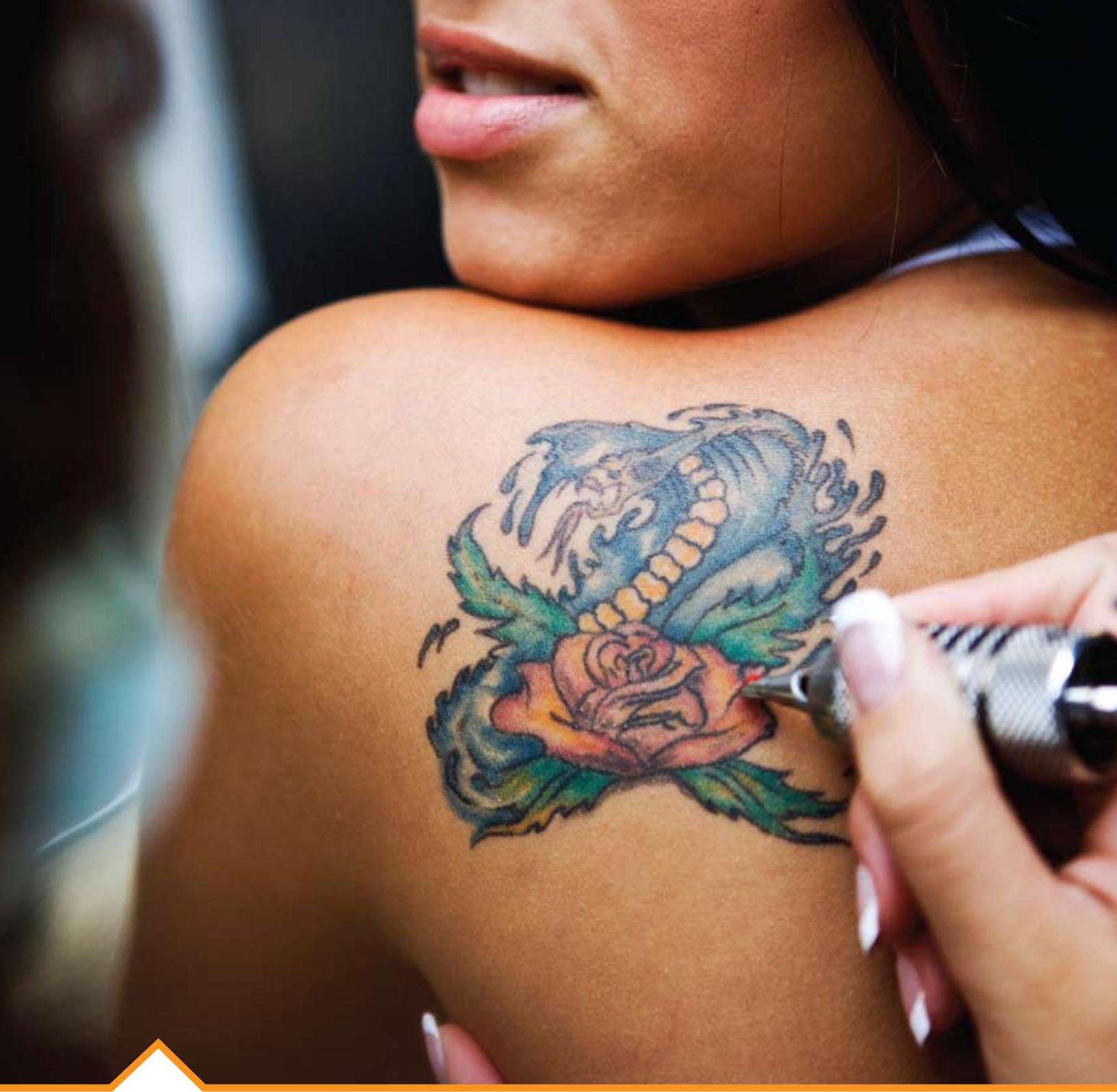
Products/treatments that "brighten" skin, and attack sun damage and dark spots, are a massive skincare trend for people of many colors. This in part reflects the realities of an aging global population: A recent survey of Baby Boomer women (over 45) found that two of their biggest beauty concerns are age spots and uneven skin tone.² One spa example: ESPA's signature Skin Brightener Facial at global spas from The Malvern Spa (U.K.) to the Peninsula Tokyo. More spa brands like AMOREPACIFIC, Eminence, Kahina, Kirsten Florian and Repêchage now have products to attack hyperpigmentation, while Korres, SK-II and Clarins are all embracing brightening.

Across Asia, where fair skin is the beauty ideal, the skin lightening market is a staggering US\$13 billion.³ (Lightening products represent 70 percent of the total Chinese skincare market.) While the internalized belief that lighter skin is superior to darker is NOT what one means by "color self-expression," it's certainly a choice being made by billions. A positive development: Far more beauty brands (from Benefit to YSL) are developing so many more, and better, skin and makeup products for the full spectrum of the world's actual



Photo by MANIC PANIC www.manicpanic.com

In 1977 **MANIC PANIC™** founders and sisters Tish and Snooky, singers with the original Blondie lineup, opened the first punk-style boutique store in New York City's East Village. Popular with alternative musicians, fashion icons and hipsters for over 30 years, MANIC PANIC is riding a new wave of mainstream popularity with its matching cosmetics, nail polish and semi-permanent, vegan formula hair colors like VOODOO BLUE™, shown in this photo.



Approximately one in three Americans aged 18-25 have tattoos, and roughly one in three people overall in the U.K. do as well. But body art is moving out of the sketchy "parlor," and we will now see more combo haute spa/body art studios, and more spas with body art on the menu. If you're ready for a tattoo, look for a massage before your inking and new subtle, white designs. Temporary and henna tattoos are also on the rise with new offerings from name-brands like Christine Dior's 24-carat temporary gold tattoos.



The popularity of nail art shows no sign of stopping as celebrity nail artists create freehand mini-paintings on each digit, and new inventions like mood-changing polishes are on the rise. First Lady Michelle Obama even flashed blue nails during the 2012 U.S. presidential campaign. **HEARTS NEW YORK SALON & YUKIE BEAUTY SALON** in New York City offer clients designs by NailGrafx™ that use high-resolution technology to apply photographs and art to nails.

skin tones. And with people of color prone to greater hyperpigmentation, brands like Dr. Nick Lowe and Darphin are launching products that fade pigment-producing melanin. This welcome trend will only surge as the global population becomes less “white.” And the language will continue to move to “brightening” and “fading” and away from the racially freighted “whitening.”

ART GALLERY OF NAILS

Nail art, unbelievably, is only ascending. We've seen endlessly rococo looks these last couple years, and new inventions like magnetic, rubber and even mood-changing polishes are appearing. Look for: Less bling-for-the-sake-of-bling and more subtle, clever and truly high-art effects. Nuanced textures/designs are everywhere, whether basket weave, 3D, velvet-like or hologram. Nail artists are now rendering amazing, freehand mini-paintings on each digit. That most staid of looks, the French manicure, is even being remade in reverse ombré mode: with light tips fading into darker/vibrant color. And the old corner “nail salon” is being reimagined in incredibly trendy, serious-art ways. Take the new Fingerbang,

a pop-up “nail bar and beauty boutique” which stages “nail art events” in art galleries across Berlin. They don't just work with “traditional urban nail artists” but also “illustrators and designers.”

Nails now make headlines, whether athletes sporting elaborate patriotic designs at the recent London Olympics or Michelle Obama flashing blue nails during the recent U.S. presidential campaign. There is actually an agency (Nailing Hollywood Management, Inc.) that represents the “industry's most prominent, celebrity nail experts.” The global nail blogosphere is raging: With sites like the U.S.' Miss Ladyfinder, the U.K.'s WAH Nails or The Illustrated Nail, and Australia's Copy That, Copy Cat, one-upping each other daily with mind-blowing, micro-artistry creations... and they have big followings. As well, fashion designers now have celeb nail artists (like NYC's Fleury Rose or London's Sophy Robson or Andrea Fulerton) design awe-inspiring “looks” to match the clothes.

¹ IBISWorld research, 2012

² Digital Health survey, 2102

³ Cited Asian Scientist magazine, 2012



7

INCLUDEIVE WELLNESS (RETHINKING “DISABILITY”)

Over the last decade many new demographics have been warmly welcomed by spas: Baby Boomers, men, teens, little kids, the GLBT community—even babies. But while spas’ original DNA is healing, with the exception of Europe, there has been precious little programming for (and communicating to) the growing ranks of people with disabilities—whether the one billion-plus individuals worldwide who are formally “disabled,”¹ or the many millions more who either are temporarily so, or experiencing the challenges that come with aging.

Change is coming (and it must). Given forces like a massively graying global population and a focus-shift at spas from exclusive pampering to delivering true, inclusive wellness, more spas (and fitness centers) will now get their own “disability act” together. In the future bodies that are welcomed at spas will align better with bodies found in the real world. More spas will modify facilities and equipment to accommodate people with physical limitations and other special needs, and more will help people heal and keep their bodies functional by offering pain-relieving, mobility-enhancing therapies and “functional fitness” programs to help real bodies cope with real-life activities.

◀ BONNIE ST. JOHN,
Rhodes scholar, TV personality and author, is the first African-American person with a disability to win an Olympic medal in ski-racing. She reminds us that “we are all aging into disabilities.” A spa-lover herself, she is helping to spread the message: “Disability is a part of life. Don’t make it sad or depressing.”

FUELING THE TREND

- People living with disabilities are the world’s largest minority, representing one out of every 10 people worldwide (or 650 million people).²
- The world is in the throes of an unprecedented, irreversible demographic transformation that will lead to older populations everywhere. The percentage of people over 60 is forecast to double between 2007 and 2050 (reaching two billion), while in most countries the number of people over 80 will quadruple.³ And developing nations are now aging fastest: By 2050 more than 40 percent of the Chinese and Brazilian populations will be over 60.⁴
- It’s great news that since 1970 men and women worldwide have gained over a decade of life expectancy, but as the important, new *Global Burden of Disease Study* details, it means people are spending far more years living with disability. The study reveals that for people who live to age 50, they spend only seven months of each added year in a healthy condition. People



SPA OF THE ROCKIES AT GLENWOOD HOT SPRINGS

(Colorado, U.S.) offers comprehensive access for clients in wheelchairs or with mobility issues, including this roll-in shower, accessible rooms and hydraulic lifts for the hot springs pool that can be user-operated. The spa also gives special discounts to military personnel with disabilities.

are (and increasingly will be), the report argues, challenged with living a much longer time with musculoskeletal pain, immobility, vision and hearing loss, mental disorders and substance abuse.

- Social consciousness is rising, born of people with disabilities lobbying for more rights and better laws guaranteeing access to services worldwide—and inspiring, high-profile events like the 2012 London Paralympics, boldly redefining who a person with a disability is, and what they can do.
- The medical evidence on how diverse spa approaches can help with many disabilities just keeps mounting, from a regular massage's positive impact on chronic pain; to improving strength in arthritis sufferers; to aquatic therapies' benefits for children with autism.

WIDER PARADIGM SHIFT IN THINKING ABOUT DISABILITY

Cultural attitudes towards, and the laws that protect, people with disabilities vary widely worldwide. But language/"labels" and policies are undergoing a positive, global revision. European nations, where people with disabilities are encouraged to take spa health vacations often paid for by national health insurance, have long been the enlightened leaders, with strong anti-discrimination and right of access laws. Attitudes are shifting in places like China: 30 years ago people with disabilities were often called "can fei" or "the handicapped and useless," but

that has thankfully been replaced with "can ji ren," or "people with disabilities."

In many more nations new legislation is mandating change, often reflecting the guidelines (on healthcare, right of access, housing and employment) put forth in the influential UN Convention on the "Rights of Persons with Disabilities" from 2006. For instance, new U.S. laws mandate that all swimming pools/areas (public, or at hotels, fitness clubs, spa resorts, etc.) be made fully accessible to people with disabilities—either by sloped entry or lift—by 2012.

The language is getting more flexible and inclusive: redefining disability as a state, rather than an "identity." For instance, the Americans with Disabilities Act (ADA) does not distinguish between type, severity or duration of the disability. Its definition: "A physical or mental impairment that substantially limits one or more of the major life activities of an individual."

"Disabled" is no longer a term/concept exclusively applied to people using wheelchairs or with vision or hearing impairments. It now spans cognitive, as well as physical conditions, which can be essentially "invisible," like arthritis or diabetes. And obesity is now the leading cause of disability worldwide.⁵

The fact: Nearly every one of us will have a disability at some point in our lives—whether from a lifelong condition, temporarily from a sports injury, a pregnancy, while recovering from treatments/surgery, or as we age. The Council on Disability Awareness reports that a typical, healthy, non-

smoking, not-overweight 35-year-old has a roughly one-in-four chance of being disabled for three months or longer during his or her working career, with a 38 percent chance his or her disability will last five years-plus.

RETOOLING SPAS FOR THE WORLD'S ACTUAL BODIES

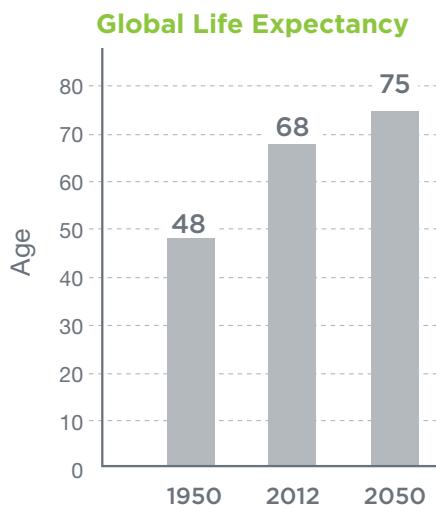
As the world's "body" will increasingly be one living with disabilities, spas, of course, have a major opportunity to deliver more restoration, recuperation, pain-alleviation, mobility enhancement, nutritional counseling/weight loss programs—and some simple touch and stress-relief to those who need it most. As a project leader⁶ on the *Global Burden of Disease Study* put it, "Progress in reducing disability just hasn't kept pace with progress in reducing mortality." The spa intersections are clear: For instance, lower back pain is responsible for 11 percent of all global disability.⁷

So, if too many online message boards have lit up with heartbreaking accounts of an individual with disabilities

reporting he or she felt uncomfortable or not properly accommodated at a spa, now more (smart) spas will warmly welcome—and deliver wellness to—people of all abilities and age levels. More will rethink facilities, equipment, programming and staffing to meet an increasingly mainstream, not niche, population. You might say that if European countries have been out in front (where spas' identity has always been health and wellness), there will be more "Europeanization" of industry attitudes and approaches globally.

Progress is underway: In a recent SpaFinder Wellness survey of global spas⁸, 80 percent reported they had an accessible entrance; 50 percent said they had at least some special equipment/interior facility design; and 43 percent reported they had a therapist(s) with special training for the needs of people with disabilities. (A much smaller eight percent reported they conduct any communications/marketing outreach for this population, but given that disabilities span spa specialties like chronic pain and weight problems, this should change.)

With life expectancy surging and the oldest "Baby Boomers" entering their late 60s, a massive wave of people with functional limitations, from arthritis, knee/hip replacements and all kinds of bodily aches and pains, is cresting. Therefore, greater emphasis will be placed on pain relief and less on pampering. And more spas will partner with physical therapists and orthopedic, chiropractic and sports medicine specialists.



Source: World Economic Forum report, 2012





Photo by Rob Sade/Thermae Bath Spa

A guest at **THERMAE BATH SPA** (Bath, U.K.), relaxes with the spa's signature treatment, watsu massage, where bodies are stretched and strengthened in warm water. Watsu is considered to be effective for people with mobility issues, including multiple sclerosis. Bath's naturally warm, mineral-rich waters were used by Celts and Romans over 2,000 years ago.

BETTER ACCESS/EQUIPMENT

More spas will provide comprehensive access for clients using wheelchairs or with serious mobility issues, including:

- Extra-wide doorways and hallways
- Hydraulic treatment beds and chairs that can be lowered and raised
- Elevators between floors, ramps instead of steps, and handrails
- Roll-in showers, saunas and shower chairs
- And, for “stay” spas, more mechanized/hydraulic pool and whirlpool lifts, or sloping ramps into pools, that enable people to easily get in and out of the healing waters

A few examples of forward-thinking spas incorporating these adaptive “disability-friendly” features: Disney’s Grand Californian Hotel & Spa, Chateau, Mont Tremblant (Quebec), Thermae Bath Spa (U.K.), Spa Eastman (Montreal) and global Ritz-Carlton and Fairmont properties. Spa of the Rockies at Glenwood Hot Springs (Colorado, U.S.) integrates all of the above and has added thoughtful amenities/programs like hydraulic lifts for hot springs pools that can be user-operated, so guests don’t need to ask for assistance—and specials discount days for (the many) military personnel with disabilities.

More fitness centers, like the new brand, Pure Club Med Gym (Paris-based), will be designed for inclusivity—ensuring that people who use wheelchairs or have mobility issues have complete access to all workout equipment, showers and saunas.

And because so much really hinges on trained staff with a welcoming, ready-to-assist attitude, more spas like Rancho La Puerta (Mexico) will specially coordinate visits/treatments and assign dedicated people for those who need extra help with their stay/visit.

There will be new industry services and platforms. Example: the new “Spas for All” and “Recovery Retreats” from Spabreaks.com (U.K.). “Spas for All,” launched after the 2012 London Paralympics, helps people with diverse disabilities locate the right spas and offers a “Carer Goes Free” program where helpers come free of charge. “Recovery Retreats” help people connect with spas that welcome and offer programming for those recovering from cancer.

OUR “AGING INTO DISABILITY” WORLD

As Bonnie St. John, the first African-American person with a disability to win an Olympic medal in ski-racing (and a Rhodes scholar, TV personality and author), put it so well:

"We are ALL aging into disabilities." A spa-lover herself, she is helping to spread the message and wants people to know, "When I go to a spa, sometimes I work with staff to rethink a standard procedure or treatment. Train staff not to be afraid of offending me, to ask lots of questions and to laugh with me. Be open. Disability is a big part of my life. Don't make it sad or depressing."

With life expectancy surging, a massive wave of people with functional limitations from arthritis, knee/hip replacements, cancer, tendinitis and all kinds of tears, fractures and bodily aches and pains, is cresting. Doctors call this ailment constellation "Boomeritis," referring to the generation born between 1946-64, that same high-spending group that fueled the spa industry explosion, and whose oldest members are now entering their later 60s.

Spas already have the bodywork menus to help heal an aching generation, but more emphasis will be placed on tangible pain relief, rather than pampering. And more spas will partner with (or bring on board) physical therapists and orthopedic, chiropractic and sports medicine specialists.

There's a reason some of the busiest spas today have hot springs and thermal baths at their center, and pain-relieving spa bathing will continue to boom, whether at newcomers like Aire Ancient Baths (Manhattan), established players like Blue Lagoon (Reykjavik), Tabacón Grand Spa & Thermal Resort (Costa Rica) or Canada's Scandinave and Le Nordic thermal bath spas—or at locations like the always packed, affordable Korean spas blooming in cities like L.A. and New York.

A few examples of spas attacking the aging opportunity: Willow Stream spas at global Fairmont Hotels & Resorts' (16 locations from Canada to China) signature Stay Active Rx program, with therapies targeted at joint inflammation, aches and pains and mobility. Thermae Bath Spa's (Bath, U.K.) many offerings, like watsu massage (shiatsu in thermal waters), where bodies are stretched and strengthened in warm water—great for people with mobility problems, spinal injuries or multiple sclerosis. The "B. Wellbeing & Spa" at Grand Resort Bad Ragaz (Switzerland) helps both young and old recover, with its rheumatology, orthopedics and rehab menu and team of doctors and physical therapists that soccer and Olympic teams turn to. And U.S. day spa brand Massage Envy (800-plus locations) now features a pain-relieving (using Biofreeze) and flexibility-enhancing "Geriatric Massage." Massage Envy also partners with the Arthritis Foundation and "Healing Hands for Arthritis" in-clinic national events.

FUNCTIONAL FITNESS

We'll see more of the buzzing trend of functional fitness training and more coaching for people with disabilities at spas and gyms.

Unlike conventional gym workouts aimed at building isolated muscles, functional training trains the whole body, in three-dimensional movement, incorporating timing and coordination to improve the balance, force and endurance needed to perform real world, daily activities. (For example: The old bicep curl does not prepare people for catching a railing as they slip down a flight of stairs.)

Functional training uses the same techniques that pro athletes and dancers employ. For instance, plyometrics involves short bursts of power and quick direction changes. Gyrotonics® (created by a professional ballet dancer) incorporates principles from dance, yoga, tai chi, gymnastics and swimming, and involves spiral movements of the spine, arms and legs (often using the resistance of a machine) to build strength, coordination and a range of fluid motions. Other methods that speak to functional fitness: tai chi and chi gong, TRX suspension training, P90X and kettlebell workouts. All are designed to build a stronger body that can cope in a real world—more of these methods will pop up in spas from California (at places like the California Health & Longevity Institute) to China (at locations like the new Iso Fit in Beijing).

For years, perhaps the most ubiquitous spa-marketing image has been that perfect, generic, 20-something woman with hot rocks placed down her straight back. Understandably, spa, like every industry, does aspirational marketing and wants to broadcast what it does to specifically produce optimal health and youthfulness.

But given the fact that billions are aging into disability, and the more focused industry mission of delivering wellness to everyone, more spas will broaden their offerings, messages and mindset to welcome more of the world's real bodies.

One hardly expects every spa to make this a programming focus, but one does expect every spa to be welcoming and accessible. And those that better serve the bodies that exist in the real world stand to profit.

¹ WHO data, 2012

² United Nations data, 2012

³ United Nations data, 2012

⁴ World Economic Forum data, 2012

⁵ Global Burden of Disease Study, 2012

⁶ Joshua A. Salomon, Harvard School of Public Health

⁷ Global Burden of Disease Study, 2012

Crunch Pole Dance Fitness
Insanity™ SurfSet Classic™ Hot Figure 4
Charles Atlas® ViPR™ The Lotte Bork Method® Joseph Pilates
Jazzercise® Piloxing® HIIT

Zumba® Madonna's Hard Candy™
New York City Ballet Yoganates Kathy Smith

Cindy Crawford Jane Fonda **TRX Abs of Steel**
Trojan Fitness Yoga Tuneup®

Billy Blank's Taebo® **Barry's Boot Camp**

Cross Fit Prevention Magazine Byran Kest's Power Yoga
LaBlast

The Skinny Jeans Workout™
Stand Up Paddling Bikram Yoga Brooke Burke
Beach Body Kendra

Cardio Kickboxing Fly Yoga Gary May's 3D Core Training
Power Yoga Daily Burn Mayo Clinic

Yoga Booty Ballet Richard Simmons
Jackie Warner

Trudy Styler **YogaZone P90X™**
Carmen Electra Jack LaLanne
Leslie Sansone Walk at Home Gyrotronics®

The Biggest Loser® Hardcore Fitness
Bob Harper: Yoga for The Warrior Kim Kardashian Yoga Journal

Dancing With The Stars Pound Rockit Workout
Metcon 3 Lindsay Ellingson's Bodyweight Workout

Bollywood Dance Workout

SoulCycle® Power Fit Exhale® Physique 57
BroadwayDance Center

Jillian Michaels **Brooklyn Bridge Boot Camp**
PureYoga The Caveman Workout Denise Austin
The Bar Method

Body Revolution™ Flywheel™

8

LABEL-CONSCIOUS FITNESS

“Name-brand” fitness has been around for decades, but fitness programs, often branded by celebrities and fitness gurus, have exploded (and receded) as media-driven tastes and fashion changed over the years. But today being fit is the new luxury, and the manic mechanisms of chasing the new, the “in”, and what the insider elite is doing, have infused the fitness world with a distinct “haute couture” vibe, with new methods and classes spawning like fashion brands—in every imaginable style.

And it’s not just the residents of cities like New York, London and LA that are embracing this “label-conscious” fitness culture. Thanks to seemingly never-ending media coverage of celebrities, top-ranked TV shows and films celebrating the lean and fit—and 24/7 Internet access virtually everywhere—people worldwide are acquiring a thirst for the latest regime that will help them achieve a fit (and beautiful) body.

While some fitness labels may be just a fad, label-conscious fitness is a serious trend that’s not going anywhere. Brands will remain a permanent feature of the fitness world future as hundreds (and hundreds) of trademarked and registered programs/classes create a sea of ™ and ® symbols. This label-ization and brand naming is proliferating across every major fitness category, and even proponents of a sensible “back to basics”/no “fad” approach don’t hesitate to use a label to describe their programs (think functional fitness and core training).

Label-conscious fitness is a serious trend that’s here to stay, as brand naming continues to proliferate across every major fitness category. Even proponents of a sensible “back-to-basics”/no-“fad” approach don’t hesitate to use a label to describe their programs (think functional fitness and core training).

FUELING THE TREND

- Global entertainment and media revenues were projected to reach US\$2.2 trillion by 2012.¹ Celebrities from Bollywood to Hollywood often have higher name recognition than the heads of many countries, and global pop culture’s influence just keeps exploding. And many stars have discovered that branded fitness programs are a lucrative way to increase their multi-million dollar incomes—and remind fans just how gorgeous they really are.
- According to International Obesity Taskforce (IOTF) research, obesity is a global epidemic: worldwide, roughly one billion adults are overweight and an additional 475 million are obese. In the European Union approximately 60 percent of adults are overweight. The result

of this epidemic is that there is a growing (and growing) population looking for the latest ways to shape up and lose weight.

- In 2012 the World Health Organization reported that within the next five years, for the first time, the number of adults aged 65-plus will outnumber children under five. (By 2050, senior adults will outnumber children under age 14.) An aging population has a greater need for specialized fitness programs and personalized instruction, and more time to pursue their fitness regimes.
- The sheer size/growth of the world's population, estimated at seven billion in 2011,² is fueling the rapidly growing fitness market. Health club memberships passed the 120 million mark for the first time recently: there are now 128 million card-carriers, more than doubling from 50 million in 1999. And that's just health clubs. Much more fitness is taking place at independent studios and spas. In a crowded, competitive space, and a mature market, even more innovative approaches will spawn.
- Because we have become such an intensely "wired" world (an estimated 75 percent of the world's population has a cell phone³), people crave human touch and connection like never before. Fitness and exercise were once typically solitary pursuits, but increasingly they are becoming an opportunity for social interaction. An array of group classes, from hard core cross fit/boot camps, to dance, to new breeds of spinning, is exploding.

PIONEERS AND THE NEW GENERATION

Arguably, Charles Atlas, who was born in Italy in 1892 and created the Charles Atlas™ "Dynamic Tension" exercise course in the 1920s, started the branded fitness craze when he launched one of the world's longest-running and most famous advertising campaigns. His print ads, which starred a "97-pound weakling" who takes the Atlas course and then conquers a bully who "kicked sand in his face," have been seen by hundreds of millions of people. The "Hey Skinny®" and "The insult that made a man out of Mac®" advertisements, have appeared for nearly a century in comic books and magazines, and Charles Atlas, Ltd. remains one of the oldest American companies in operation.

Well known "name brand" fitness pioneers also include German-born Joseph Pilates, who created the popular Pilates exercise system in the early 20th century. (Mr. Pilates never trademarked his method, fueling a wave of hybrid-Pilates models.) Lotte Berk was born in Germany (1913) where

she became a prominent ballet dancer. In the 1930s she immigrated to England, where she subsequently created the Lotte Berk® Method, a unique program combining strength training, dance and Hatha Yoga in a one-hour workout. San Francisco native Francois Henri "Jack" LaLanne was also ahead of his time (years before Richard Simmons and Jane Fonda) when he began promoting his own brand of fitness in the 1950s and built a fitness empire that he actively promoted until his death in 2011 at the age of 97.

Fast-forward to the late 1960s when Judi Sheppard Misset founded her wildly successful Jazercise dance program (In 2009/2010 Jazercise reported US\$96 million in revenue and operated classes in 32 countries.) Or to the early 1970s when Bikram Yoga founder, Bikram Choudry, began his still hot, branded yoga program and subsequently became known for driving his Rolls Royce around Beverly Hills. It was easy for budding fitness gurus and celebrities (and their agents) to do the math and recognize that branding a fitness program was something worth pursuing.

Since then the invention of new fitness models has boomed. We've seen the birth of TRX Suspension Training (invented by a former Navy Seal), Piloxing, CrossFit, SurfSet Fitness (on indoor "surfboard" platforms), Metcon3, The Skinny Jeans Workout™, LaBlast, Yoga Tuneup®, P90X™ and Insanity™, among hundreds, if not thousands, of others being marketed. And then there are the programs endorsed by celebrities, weight loss experts and personal trainers (Think Jillian Michaels, Victoria Secret Model Kindsay Ellingson, Kendra of Playboy fame and Carmen Electra.)

Yoga used to be simply yoga. Now people are devotees of niche breeds and brands: Power Yoga, Yoganates, Iyengar, Ashtanga, Bikram Vinyasa Yoga, Kripala, Anuara, Kundalini Sivananda and anti-gravity yoga—to name a few.

And Romanian-born Juliu Horvath, a professional ballet dancer who defected in the 1970s, may well be the heir apparent to Joseph Pilates, with his Gyrotonic Expansion System® and GYROKINESIS®, a fluid system of exercises and joint articulation. However, there is one major difference between Horvath and Pilates. You'll see a registered trademark symbol after all of Horvath's systems, protecting the popular brand.

It's all happening so fast that even Zumba feels aged at year 12. But of course it's not, with 14 million Zumba-ers in more than 150 countries doing the Latin-rhythm-based exercise craze weekly.

THE INSULT THAT MADE A MAN OUT OF "MAC"®

CHARLES ATLAS started the branded fitness craze when he launched one of the world's longest-running and most famous advertising campaigns. His print ads starring a "97-pound weakling" who takes the Atlas course and then conquers a bully who "kicked sand in his face," have appeared in comic books and magazines for nearly a century and have been seen by hundreds of millions of people. Charles Atlas, Ltd. remains one of the oldest U.S. companies in operation.

"The Insult That Made A Man Out Of Mac®" ad trademarked and provided by Charles Atlas, Ltd. 2013, www.charlesatlas.com.



TRX is the creator of Suspension Training® and Rip™ Training Equipment. Founder Randy Hetrick, a former Navy SEAL commando and student at Stanford's Graduate School of Business, built a highly successful brand that creates innovative products—and provides knowledge about how to use them. The company reported revenues of US\$32 million in 2012.



Founded by Madonna, in partnership with New Evolution Ventures in 2010, **HARD CANDY FITNESS**® is a global luxury fitness brand dedicated to providing a combination of entertainment and fitness that will help members feel strong and inspired.

SOULCYCLE® (New York and L.A.) combines inspirational coaching and music to deliver an intense full-body workout with a fun and energizing atmosphere. Fanatics can even wear apparel branded with SoulCycle's yellow wheel.



WHERE IT BEGAN, WHERE IT'S GOING

The concept of branded fitness began largely in the U.S. (and America still dominates the global fitness market), in part because it is more lucrative and easier to own trademarks in that country. But international stars are on the rise. For instance, Jung Da Yeon created her “momjang syndrome” in her native South Korea and has since expanded her fitness empire to Japan, where she markets DVD exercise videos, books and her own Nintendo Wii game. While inspiring women to transform themselves, she is also making made millions of dollars.

Let's face it, the treadmill and weights routine of yore can be exactly that: a dull routine. As Mintel research shows,⁴ 80 percent of Americans who have gym memberships don't use them. Access to so many new, innovative classes/approaches keeps people excited about fitness and a stream of new memberships flowing.

As the market became oversaturated with choice, fitness facilities and trainers use branding and celebrity faces to distinguish their products and serve as a shortcut to instant recognition in a market full of similar products and services. Aside from token physical education or health classes in school the average fitness consumer isn't educated to make informed choices. An endorsement can seem like a time saver—the logic being that if a famous person uses the method, it must be good.

That is why fashion, celebrity and fitness intersections will only grow. Not surprisingly, the ultimate international fashion-icon, Madonna, has opened a brand of gyms/spas, dubbed “Hard Candy Fitness®,” with locations in Mexico, Moscow, Sydney and Santiago—and with more to come. The chain offers a rich menu of group fitness, themed around Madonna's artistic career. There is also a selection of DVDs so clients can continue their workouts at home.

Exercise fanatics today can even wear apparel signaling how and where they like to work out, like crops and tops from SoulCycle (locations in New York and L.A.), branded with its yellow wheel.

As Anna Bjurstram, managing director of Swedish-based Raison d'être, sees it, “Looking at the global fitness landscape today, it is evident that there are many more fitness actors than ever before offering their services. The fitness options right now are endless.”

But, in what may be a counter-trend, Bjurstam notes that the big buzz is also around functional training, with larger areas in gyms devoted to this new form of lifestyle training, which uses TRX, balls, ropes, skip ropes, punch bags, kettle bells, boxes, balance plates and floor space to stretch and move.

SPAS & HOTELS GET IN ON THE BRANDING ACT

As noted in the “healthy hotels” trend, fitness centers at more hotel spas are getting vaster, more spectacular and loaded with as much branded fitness programming as any chic urban gym. And, as more day spas become hybrid spa/fitness centers, more branded fitness and an explosion of fitness methods, will move across the spa world.

A few examples: The new Arizona Biltmore's fitness menu serves up a dense menu of Power Fit, Cardio Kickboxing, Yoga Booty Ballet, Sculpt and Abs, HIIT, Hydro Fit, Kick, Punch & Crunch, along with golden oldies like Zumba and Pilates. The InterContinental (L.A.) reportedly holds a Zumba class on its helipad. Yoga Booty Ballet is offered at The Orlando Hotel (L.A.), Piloxing at the Tribeca Grand Hotel (New York) and branded spinning classes at W Union Square. There are numerous branded classes at the Biltmore (Coral Gables, FL) and the Trump International (Chicago, IL), while the Golden Door (Encinitas, CA) has brought in celebrity dancer, Karina Smirnoff (reigning champion of “Dancing with the Stars”) to teach her branded DanceFIT program.

But spas aren't just retailers of new branded fitness trends, they can also be creators. Just consider Exhale spas' original Core Fusion classes and the many new iterations that have bloomed: Core Fusion Boot Camp, Core Fusion Cardio, Core Fusion Sport, Core Fusion Yoga, etc. etc.

THE FUTURE

A celebrity-crazed and media-obsessed global population, a growing worldwide obesity problem, a fast-aging world—and the promise of financial profit—have come together to create fertile ground for the branded fitness boom. Spas, hotels, gyms, trainers, celebrities, would-be celebrities, athletes and dancers have all jumped on this branding bandwagon that shows no sign of stopping. The trend promises to become even bigger as the international market expands and global players enter the scene.

In the future, don't be surprised to see a major grocery store, drugstore chain or an airline launch a branded fitness program...or maybe even you?

¹ Price WaterhouseCooper's “Global Entertainment and Media Outlook: 2008-2012

² Population Reference Bureau, 2012

³ The World Bank, “Information and Communications for Development 2012: Maximizing Mobile”

⁴ Mintel, “Exercise Trends” report, 2012



9

MEN: FROM BARBERS TO “BROTOX”

When SpaFinder Wellness first identified the upsurge in men hitting spas (Trend Reports 2001, 2005) the focus was on new “macho” spas, where post-golf rubdowns and old-fashioned shaves took place in clubby, brandy-sniffing-and-sports-watching environments...aggressively assuaging all fears that “what was going on” had anything to do with feminized beauty. If the spa-man headlines for the last decade have been all about rugged relaxation and rejuvenation, you might say that the big story now is Restylane and Juvederm.

Just a couple years ago the term “metrosexual” (referring to a niche group of men hyper-meticulous about appearance) caused knowing laughter, but now the term just feels silly and obsolete. Men globally are spending SERIOUS money on their looks (from head to toe) and the male grooming, skincare and cosmetic procedures markets are exploding. And far more spas are building out comprehensive, for-men “beauty” menus: whether skincare, mani-pedi, waxing and threading services, or more intense work like BOTOX®, fillers and surgeries. And yes, many of these “man-ity” services are still getting played out in spa/med-spa environments with that reassuringly masculine, “guy’s guy” vibe and language.

FUELING THE TREND

◀ A man enjoys a spa pedicure, which is increasingly becoming a routine part of male grooming. Twenty-five percent of men ages 18-34 have had their nails done in the U.S. alone.

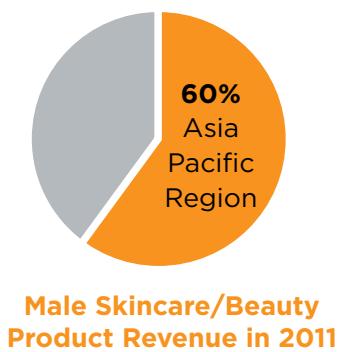
- With the recent recession and ongoing global unemployment crisis, workplace competition is brutal, and men are spending on self-presentation to stay in the game.
- Baby Boomers (aged 48-66), both women and men, are the first “refuse-to-age” generation—and they have massive spending power.
- Younger male generations are dramatically more comfortable with the concept of male “beauty” and embrace new, higher standards. Consider these U.S. stats: 25 percent of men aged 18-34 have had their nails done, while 20 percent have had a facial (on par with the 22 percent of women in that age group¹). As these next-gen consumers move into their peak spending years, male spa/beauty services will only grow.
- “Celebrity” standards of good looks and youthfulness are becoming de rigueur for all (not just for women), and celebrity culture is becoming as saturated in China as it is in Chicago.

It's not just more culturally acceptable for men to spend on looking good, it's becoming perceived as a necessity. The only thing eyebrow-raising about it is the trend's sheer power. And if one might imagine this trend would be most powerful in the U.S. (where Hollywood holds court), the data from Asian, South American and European markets tells a different, eye-opening story.

GROOMING BOOMING

Drugstore shaving cream and aftershave were once the only products found in the most manly-man's grooming arsenal, but now male skincare is the fastest-growing sector in the beauty industry worldwide. Experiencing double-digit growth every year in the last five, it's expected to keep surging through 2016.² All the components from women's skincare lines are getting rolled out in a whole new "shelf" of man-focused products: anti-aging and anti-acne creams, concealers, moisturizers, powders, you name it. Exclusive-to-men lines like The Art of Shaving, Menaji or Jack Black keep proliferating, as do high-end, spa product lines like Organic Male OM4 or the Nickel Spa for Men brand's own line.

Men's skincare/beauty products are growing fast in the United States: sales have spiked 18 percent since 2006, and are expected to grow another 23 percent by 2015.³



But look at Asia, South America and Europe. Last year nearly 60 percent of total male skincare/beauty product revenues came from the Asia-Pacific region—with a relatively small army of 19 million Korean men comprising an astounding 21 percent of global sales!⁴ In India the men's grooming market is clocking 30-40 percent growth annually.⁵ In China the share men command of total beauty services is approaching parity with women at 38 percent.⁶

In France, Germany, Italy, Spain and the U.K. men's skincare sales skyrocketed 45 percent from 2005-2010.⁷ But it is Latin America that is expected to lead all this future global growth,

with Brazil alone expected to represent a third of the total men's grooming market by 2016.⁸

This male grooming obsession is, of course, profitably spilling into spas, salons and all the new, "olde-tyme, barber-beauty" shops. And men are getting far more than facials, they're ordering up more mani-pedis, hair color, threading, eyebrow shaping, eyelash tinting, spray tanning...basically, if it's on the menu, it's being devoured.

Even territory once heavily reserved for women, like bikini waxing, is now being invaded by males, and it's spawning services (and language) like the "boy-zilian." For instance, Bliss Spas (20+ locations from Barcelona to Hong Kong) introduced a male waxing menu in 2011, and reports that bookings have since doubled (with Brazilians being its most frequently booked service). The marketing copy around the brand's "He-Wax" services illustrates the new comfort and candor, explaining how "taking it down to the bare manimum" can deliver "the fabled 'optical Inch' and 'wax-imize' a man's confidence." And spas report that men like to hit unisex, multi-service spas (like a Bliss), or a "gentleman" spa known for shaves (rather than a waxing-only destination), to keep it on the down-low.

So, many more spas worldwide will now offer more robust, for-men beauty services. Examples include the Gentleman's Tonic brand (London, Hong Kong) whose menu spans everything from eyebrow shaping to waxing and Hommage Barber Rooms, which has 11 properties from Bermuda to Macau—and more coming. Hommage is the first luxury barber shop brand-concept where facials, mani-pedis, massages and more are delivered in a private gentlemen's club-like environment located in 5-star hotels. Or consider the incredible lineup of manicure-to—"manscaping," lips-to-lashes services at Canada's Bodé Medi-Wellness spas, with its playfully named treatments like "The Tune-Up," "Liquid Plumber" (facial), "The Hand Shake" (manicure) or "The Sock Destroyer" (pedicure).

And Tom Wilscam, CEO of Hommage, notes, "Hair color, threading, facials, manicures, pedicures, injectables...they're all becoming much more popular. But with men everything has to be results-driven. It can't fall within the categories of the frivolous or indulgent; it has to be grooming and treatments as a subset of taking care of oneself, and doing what you need to do to remain competitive in the work world."



Baby Boomers (ages 48-66) are the first “refuse to age” generation—and they have massive spending power.



Men are also frequenting spas that provide services to women. Male clients at **YELOSPA** (Manhattan) have increased from 21 percent to 32 percent over the last four years. The company is opening a YeloSpa in São Paulo, where men have enjoyed mani/pedis and facials for years. In fact, Brazil is expected to represent one-third of the total men's grooming market by 2016.

A man enjoys a facial at **NICKEL**, a men-only spa with locations in London, Paris, San Francisco and New York that was created in 2001. Many “man-ity” services are presented in an environment with a masculine vibe.



Spa owners report that BOTOX® and fillers are popular with men, but they have different needs than women when it comes to enhancement. Most prefer subtle, gradual and not too “plastic” results.

"BROTOX," FILLERS, NIPS, TUCKS

Dramatically more men—from Beverly Hills to Berlin to Beijing—are having more serious work done at med-spas and plastic surgery offices as injectables, laser treatments and new surgery technologies make for little downtime and telltale scars. While the top male cosmetic procedures vary globally, growth across numerous global regions is similarly jaw dropping.

A few market spotlights:

- In the U.S. men now represent roughly one in 10 cosmetic procedure patients. The top less-invasive procedures: BOTOX®, laser hair removal and microdermabrasion. The top more -invasive: Rhinoplasty, eyelid surgery and liposuction. The number of American men getting BOTOX® has surged 258 percent in the last decade.⁹
- In Germany, the number of men opting for cosmetic surgery has more than doubled in the last five years, making one in every five current patients male. Top procedures: eye-lifts, nose-jobs and tattoo removal.¹⁰
- Almost half (47 percent) of all people having cosmetic surgery in the United Arab Emirates are men, with body contouring/liposuction and face/neck lifts most popular.¹¹
- Diverse Asian nations are experiencing serious growth, particularly (for both men and women) the procedure involving clipping the skin around the corners of the eyes to make them appear more round. While the gender breakdown for China apparently doesn't exist, it has become the third largest cosmetic surgery market (behind the U.S. and Brazil). Operations are doubling every year,¹² fueled by the growing celebrity/media culture, and the obsession with getting that star or starlet's looks.
- Korea is undergoing a plastic surgery craze, and men are right in the thick of it—leading to more men-only clinics and more existing clinics launching dedicated centers for men. For instance, men can get a little "Gangnam Style" on at Man + Nature, a four-story, males-only plastic surgery center in the toasty Gangnam region of Seoul, crowded with other high-end plastic surgery centers, spas and salons.

Men, many med-spas report, have different needs than women when it comes to all this enhancement, particularly in the West. They demand subtle, gradual and not too "plastic" results. You know, smooth out some lines, but keep me ruggedly handsome...if I'm 60, make me look permanently 45, but not a farfetched 25. Hence, a recent article in *The Hollywood Reporter*¹³ noted that man-stars now admit that "BOTOX® is now no more unusual than toothpaste" in Tinseltown, and that

there are a lot of "liquid face lifts" (fillers) going on, to avoid the obvious "before" and "after" epiphanies and photos.

Nicolas Ronco (owner of Manhattan's pioneering "napping spa" brand, Yelo, and manager of Nickel Spas for Men in Paris, London, NYC and San Francisco) reports that "BOTOX® and fillers are just killing it with men...and while I don't see male BOTOX® parties taking off, they're quite comfortable talking about it today." And Ronco argues that the bottom line for beauty trends of any type now is: "Women initiate the trend, gay men quickly follow suit...and it then takes roughly two to five years for straight men to adopt it."

So, if men seek to keep people guessing—did he, or didn't he?—the data speaks loud and clear: He probably did. And because the privacy, supportive atmosphere and multidimensional wellness/beauty identity of spas/med-spas makes them extremely appealing (whether for facials or face-lifts), it's a major industry opportunity. Men will continue to be the fastest-growing beauty services and med-spa market of the future...that is, until they catch up.

¹ Mintel research, 2012

² Euromonitor International data, 2012

³ Mintel research, 2012

⁴ Euromonitor data, 2012

⁵ PWC data, 2012

⁶ Cited in *The China Times*, 2012

⁷ Mintel research, 2011

⁸ Euromonitor data, 2012

⁹ American Society of Plastic Surgeons data, 2012

¹⁰ German Association for Aesthetic Surgery (GÄCD) data, 2012

¹¹ Emirates Medical Association data, 2012

¹² International Society for Aesthetic Plastic Surgery, 2012

¹³ "The Secret World of Male Face-Lifts," 11/2012



WHERE THE JOBS ARE

The world has a nasty jobs problem: an unemployment backlog of 210 million people worldwide and 30 million jobs lost since the recent recession.¹ Economists argue that 400 million new jobs will need to be created over the next decade² to avoid this crisis from worsening. The cry for “jobs, jobs, jobs” dominates political discussions, as it did, for example, in the recent U.S. presidential election. But while “high-tech” is the much-discussed job-creation savior, there is too little recognition of the opportunities within the growing, talent-needy, “high-touch” spa and wellness industries.

In fact, with the US\$2 trillion-plus wellness market continuing to explode, it’s led to a different kind of job crisis for industries like spa, fitness, Pilates and yoga: The demand for talented spa directors, managers, therapists and aestheticians—and diverse wellness professionals and practitioners—will simply outpace supply in 2013 and beyond. And, as a result, businesses and governments will get organized and ramp up initiatives (whether training programs or better compensation) to attract, and create, the talent they desperately need.

FUELING THE TREND

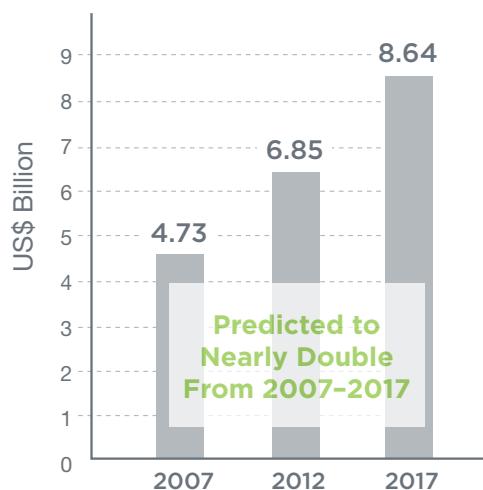
There is a global jobs crisis, but in the spa/fitness industry demand for talented professionals is outpacing the supply. A study conducted by SRI International (SRI) for the Global Spa & Wellness Summit found that 95 percent of the executives surveyed had challenges finding qualified candidates.

- The spa industry has experienced powerful growth over the last 15 years, even clocking gains over the brutal recession, as other industries have suffered. Consider: worldwide spa industry revenues grew 20 percent from 2007 to 2012 (reaching US\$73 billion), while spa locations jumped 22 percent (to hit 87,000+).³ In numerous emerging markets, including many across Asia, spa revenues are growing at 20 percent annually. To put this in context, there are now more than four times as many spas globally as Starbucks.⁴
- The global economy will continue to shift from manufacturing jobs to services- and knowledge-based industries.
- The massive global wellness market (spanning spa, alternative medicine, nutrition/weight loss, fitness/mind-body, corporate wellness and medical and wellness tourism) will continue to boom as more people, businesses, governments, healthcare organizations, insurance companies, etc. recognize that the world can no longer afford the old, reactive, “wait-until-they’re-sick” healthcare approach, and need more proactive, preventative solutions.

The screenshot shows the homepage of spa opportunities, a website for the spa industry. It features a navigation bar with links for Home, NEWS, TRADING, MAGAZINE, BLOG, SPA-411.NET, REPORT NEWS, REVIEWS, SUBSCRIBE, and CONTACT US. There are also social media icons for Facebook, Twitter, LinkedIn, and YouTube. A search bar at the top right allows users to search for other leisure industry publications. The main content area displays a list of 'latest spa jobs' with various titles and details. On the left sidebar, there's a 'Jobs Search' section with filters for 'world region' and 'salary', and a 'Find Jobs' button. Below that is a 'diarydates' section listing events like '20-21 Jan 2013 Serious Business Roosevelt Hotel New Orleans, United States' and '24-26 Jan 2013 UK Pool and Spa Expo NEC, Birmingham, United Kingdom'. At the bottom left is a 'spa-kit suppliers news' section with a small image of a spa product.

Spa Opportunities, which publishes spa news and jobs in association with *Spa Business Magazine*, is a respected source for industry employment opportunities. In developing nations, the spa/wellness employee crunch is even more intense, fueled both domestically (by increased spending power) and internationally (by inbound tourism growth).

Yoga and Pilates Named One of Top Ten Fastest-Growing U.S. Industries Growth/Forecasted Growth



Source: IBISWorld Data

- Tourism now employs one out of 12 people in both advanced and emerging nations.⁵ And as many more countries increase investments to grow their wellness tourism, this travel niche will continue to receive more visibility and financial support, and drive more spa/wellness jobs, at every level.

The research—and reports from industry leaders—concur that “wellness” jobs recovered more quickly from the recession and are now growing faster than the vast majority of employment sectors.

EXAMPLES OF THE SPA/WELLNESS JOB SURGE

- Global health club memberships more than doubled from 1999 to 2010, from 50 million to 128 million. According to IHRSA’s most recent report, Europe and the Americas both experienced double-digit membership growth for the last year analyzed (2010).⁶
- As global waistlines continue to expand, so does the fitness job sector. For instance, in the U.S., fitness-training jobs are expected to grow by 29 percent from 2008-2018, much faster than the average job category.⁷
- In developing nations (BRIC, across Asia, etc.), the spa/wellness employee crunch is even more intense, fueled both domestically (by increased spending power) and internationally (by inbound tourism growth). For example, if wellness services in India currently employ about one million people, three million skilled workers will be needed by 2015.⁸ Tripling in three short years!
- Specialty fitness, like yoga and Pilates, is penetrating every global market. Consider the U.S.: 20.4 million Americans now practice yoga (up roughly 30 percent from 2008).⁹ And yoga and Pilates were recently named one of the top ten fastest-growing U.S. industries overall, with revenues forecast to roughly double (from US\$4.7 billion to US\$8.64 billion) from 2007-2017.¹⁰
- While forecasts for global spa employee job growth don’t exist, experts like Anna Bjurstram, Managing Director of Raison d’Etre (which owns and manages many major hotel spas worldwide and recently launched a spa management training program because of the challenge of finding qualified personnel), estimates that the need for qualified spa therapists will grow by 15 percent—and the demand for trained spa managers by 20 percent—each year.
- Consider the impact a single spa enterprise can have on an economy. Massage Envy (the largest U.S. day spa chain,



The glaring disconnect between the demand for spa management personnel and trained applicants is described by SRI as a “wake-up call for the industry.”

with roughly 800 locations) currently employs 21,000 spa therapists (massage/skincare), 800 spa managers and another 10,000 in support staff. They created 1,700 new massage therapist positions in 2012 alone. A little context: General Motors, heavily lauded as the “job savior” in the recent U.S. presidential campaign, has created only 4,500 U.S. jobs since the company’s government “bailout” in 2009—or about 1,500 (on average) a year.¹¹

NEW RESEARCH ON THE SPA-TALENT GAP

In 2012, the first extensive study of the global spa industry’s hiring challenges was released. SRI International’s “Spa Management Workforce & Education: Addressing Market Gaps”¹² examines the state, and root causes, of the current spa-talent gap, while pinpointing 20 industry recommendations that would go a long way in boosting the ranks of qualified spa management professionals worldwide.

A few eye-opening SRI findings:

- There are 130,000 to 180,000 spa managers/directors working today, but only 4,000 students currently enrolled in a spa management education/degree program.
- 95 percent of industry executives reported challenges in finding spa management job candidates with the right qualifications and experience.
- The spa management education landscape is fragmented and underdeveloped: There are only 64 spa management-related degree programs available in universities, colleges,

and schools worldwide, and only 41 providers of spa management continuing education.

- Only four percent of current spa managers/directors hold a formal spa management degree.

This glaring disconnect between current (and looming future) demand for spa management positions and qualified applicants is, of course, fantastic news for those who get the right training under their belt. But, as SRI’s Senior Economist, Katherine Johnson, also noted, “It’s a wake-up call to an industry... where the highest personal service, professional standards and people are its greatest assets.”

INDUSTRY WILL ATTACK THE GAP

So, look for spa businesses, educational institutions and governments to get more aggressive about initiatives that can create the right “spa people”: from more training aimed at the beginning or middle of careers, to companies offering more internships and sponsoring scholarships, to spa therapy schools adding more management/business coursework to their curricula.

We’ll see more...

- Face-to-face and online spa management programs emerge, like the University of California, Irvine or the University of Derby, Buxton (U.K.).
- Partnerships between spa businesses and educational institutions, like the European ILIS (Innovations and Learning in Spa Management) project, where universities in

Students attend a massage class at **CHIVA-SOM INTERNATIONAL ACADEMY** (Bangkok, Thailand). The academy, a department of Chiva-Som International Resorts, Ltd., offers a training program focused on spa, holistic and aesthetic treatments.



Students learn skin analysis techniques at the **ANANDA SPA INSTITUTE** (Hyderabad, India). The institute was established by IHHR Hospitality Pvt. Ltd. to provide staff well-trained in international body treatments, Ayurveda and yoga. This program is one of just 64 spa degree programs available in universities, colleges and schools worldwide.

Finland, the U.K., Austria, Poland and Spain have created intensive virtual training modules to train spa managers.

- Hospitality/spa brands launch their own formal training programs to certify spa managers, like Banyan Tree, Hyatt, Hilton and ESPA.
- More spa consultancies (like Swedish-based Raison d'Etre) develop their own spa management programs, to better serve clients.
- More governments like India, Malaysia, Morocco or Nicaragua (with an eye to growing wellness tourism) put more financial muscle behind spa/wellness recruitment and training programs.

A SPA CAREER

Since there is an increasing demand for good people in the industry, it's a great time to consider a career as a spa manager or a therapist. Both are now firmly considered a "profession," and training, compensation and advancement opportunities are on the rise.

A great spa manager/director must have both a head and a heart for spa, and typically wears many hats. The job requires numerous "hard" skills like business management, finance, IT, marketing and PR know-how, and "soft" skills like strong communication and people aptitude.

While spa managers typically need both formal training and on-the-job experience, the career path can take many routes. A four-year hospitality degree with spa management training or a focused two-year spa management program are ideal, but aren't required. For instance, 40 percent of current spa managers/directors previously held a spa therapist position.¹³ Even a receptionist job can prove a good way in, since those who are dedicated, learn fast and take advantage of the right training (particularly in business management) can experience very quick promotion. And this is not just a woman's profession: One in five spa managers/directors today are male,¹⁴ and that percentage will only increase.

Great spa therapists are people deeply interested in people and healing, and the career has many rewards. (*US News & World Report* recently named massage therapy one of the "best jobs of 2012.") Professional therapists can work in many settings, including spas, medical offices, health clubs, sports medicine centers, cruise ships, or even opt for a private practice. And, as noted, the job can be a natural launch pad to a management position.

Training requirements vary greatly worldwide, and, of course, by the employing business. In France, three years of study

are required for a license; in Germany only a person who has completed 3,200 hours of training can use the professional title of "Masseur und Medizinischer Bademeister" (Medical Masseur and Spa Therapist); in the U.S. educational programs vary by state and last six to 12 months; while in countries like China most massage (except some TCM-related) is totally unregulated.

Compensation also varies globally, but the average compensation is strong: 44 percent earn between US\$40,000-\$80,000 annually, and 25 percent report they make over US\$80,000 a year.¹⁵ And even in countries with traditionally very low salaries, like Thailand and Indonesia, earnings are growing significantly, while industry standards and certification requirements are simultaneously getting firmed up.

Spa industry jobs also deliver some glam-factor. Since demand is global, and some companies hire people within their network, there's an opportunity to work all over the world (and often in beautiful resort settings).

As Liz Terry, editorial director of leading industry magazine *Spa Business*, notes, "The spa workforce is increasingly mobile and global, with senior spa personnel relocating numerous times over their careers. And as the industry becomes more diverse, it's absorbing people from industries such as health and medicine, fitness, beauty, physiotherapy, hospitality and tourism."

Spa and wellness: A powerful job-creating force. Look for more job-hungry people and governments to digest that in 2013 and beyond. And look for significantly more action on the education front, to ensure more people have the right skills for all of these jobs.

¹ IMF data

² International Labour Office data, 2012

³ SRI International data, 2012

⁴ As of 11/2012 there were 20,366 Starbucks worldwide (Starbucks corporate data).

⁵ World Tourism Organization data, 2012

⁶ 2011 IHRSA Global Report: The State of the Health Club Industry

⁷ U.S. Bureau of Labor Statistics data, 2012

⁸ FICCI and PWC data, 2012

⁹ "Yoga in America" study, Yoga Journal, 2012

¹⁰ IBISWorld data, 2012

¹¹ GM North America's annual report, 2012

¹² Underwritten by the Global Spa & Wellness Summit

¹³ SRI International data, 2012

¹⁴ SRI International data, 2012

¹⁵ SRI International data, 2012

Hot & Getting Hotter! BUZZ WORDS

HOT	→	GETTING HOTTER!
Happiness		Mindfulness
High-Tech Jobs		High-Touch Jobs
Nature Sounds		Nature
Natural Beauty		Bold Beauty
Party Penthouse		Healthy Hotel
Ayurveda		Authentic Ayurveda
BOTOX®		Brotox
Diet Detox		Digital Detox
Strength Training		Functional Fitness
Stilettos		Bare Feet
Skinny Martini		Skinny Jean Workout
Aromatherapy Oil		Argan Oil
Cholesterol		Telomeres
Personal Wellness		Corporate Wellness
Fasting		Juicing
Currency		Wellness Currency
Casual Friday		Massage Friday
Slow Food		Wild Food
Tattoo Parlors		Tattoo Spas
Exclusive Pampering		Inclusive Wellness
Anti-Aging		Aging Well
Bling Nails		Nail Art
Medical Tourism		Wellness Tourism
Aspirational		Inspirational
Experience		Defining Moment



To learn more, or to speak to
SpaFinder® Wellness President Susie Ellis,
Contact: Beth McGroarty
Research Director & Editor
SpaFinder Wellness 2013 Trend Report
(213) 300-0107 or beth@rbicom.com

SpaFinder Wellness, Inc.
257 Park Avenue South, 10th Floor
New York, NY 10010

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