



SPA 2020

A Special Report from The Hotel Yearbook for Spa and Hospitality Professionals Worldwide

Susie Ellis visualizes how today's trends might shape the spa business a decade from now

Andrew Gibson on the evolving nexus of hotels and spas

Alison Howland predicts the needs and expectations of four generations of spa consumer in the year 2020

Ingo Schweder on the Asianization of spas

Ralph Newman on challenges in the US market

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Lisa's wonderful world

How could spa develop between now and 2020? What trends are at play, and how could they influence the shape of the business a decade from now? We asked SUSIE ELLIS, President of SPAFINDER in New York and the founder of the Global Spa & Wellness Summit, to gaze into the future and describe the scenarios she sees. Her ideas make for some fascinating food for thought.

LET ME BEGIN WITH A SCENARIO, CIRCA 2020...

Lisa, aged 36, has been working 12-plus hour days for months – trapped in a terrible cycle of bad food, bad sleep, little exercise and incredible stress. For a while now, all the cloud-based apps and biofeedback measurement tools that monitor (and automatically aggregate) her entire health behavior and history (from her sleep patterns to calories consumed and burned to her stress/cortisol levels and blood pressure) have been beeping red alerts to her that change is needed *now*. (The periodic telomere testing that's done through her company's employee wellness program agrees with the shrill beeps: All this unhealthy behavior has led to a marked shortening of the caps of Lisa's chromosomes [her telomeres], a red alert into changes happening at the cellular level that could lead to serious chronic diseases.)

She and her boss know she's in dire need of a healthy recharge, especially with a huge project looming that she's currently unfit to pull off. While they can only spare her for four days, she's accrued enough "currency" in her company's incentives program (for meeting business and health goals) that part of her mini vacation will be covered – if she chooses a destination with the environment and programs in place so that she actually leaves healthier, less stressed and mentally and physically back on track, and does not opt for some debauched, unhealthy "booze cruise," leaving her sicker when she checks out than when she checked in.

Lisa – like everybody her age – immediately turns to her various go-to, social media-powered, travel and spa locator and recommendation apps. (Does she even know how to hold a magazine?!) After an intense research session, watching rich property/spa videos, reading up on diverse programs and heeding her network's recommendations, she picks a nearby destination abundant with customizable wellness, health and spa programming. It didn't hurt that during her research the hotel pinged her a 20% discount on its four-day "de-stress, back-on-track" package – just what she was looking for.

During her online booking, Lisa identifies her exact goals and desires for the stay: her ideal daily calorie count, the fitness classes and spa treatments she wants (she opts for a little Botox – why not return looking great?) and the ratio of social and alone time she seeks. The hotel zaps back a flexible, but full and integrated itinerary/price, which looks equal parts happy *and* healthy, and Lisa books everything all at once. Her personal health, wellness and beauty history-cloud is, of course, instantly transmitted to the relevant property touch points and practitioners, and it will know her physical and mental health realities, and things like her allergies, yoga experience level, preferred massage types and even her hair color formula before she even strolls in.

When she does walk in, Lisa is instantly struck by the unforbidding, marble-free, nature-within-and-out, serene and social atmosphere. She is personally greeted at the door (through smartphone tracking), and her bags and that stressful smartphone are immediately whisked away (she opted for an unplugged retreat), as she accepts the offer for a welcome hot pool circuit, followed by a foot massage in a private tent overlooking the lake. And over the next four days she's immersed in the *wellness everywhere* approach of the hotel. Her sleep-focused and temptation-fighting room features an incredible bed, total blackout with no technology lights showing, healthy snacks and many touches like yoga mats and meditation class channels. The three square meals she eats are delicious but hit her calorie goals. She joins social experiences like group hikes, bike rides to a nearby museum, harvesting/cooking classes and the fun and evening wine-tastings (just two glasses, and there is no bar) when she wants to, and cocoons herself in the many peaceful, private enclaves when she doesn't.

She's alerted (by the bracelet she wears) to the yoga, Pilates and meditation classes on her chosen itinerary – and although there *are* formal spa and fitness spaces at the hotel, classes and treatments are interwoven across the property, and often outside, deep in nature. Her sessions with a fitness/nutrition

Lisa's wonderful world *cont.*

coach get her engaged in a cool online game, competing against other guests to meet certain diet and fitness challenges over the next three months. And if Lisa scores high, her next visit is free. In a session with a positive psychology specialist, she shares her work stresses and fears and learns techniques to stay happy, calm and focused. In a special stress-reduction/mindfulness workshop devoted to creating peak brain performance, an innovative solution for that looming big project suddenly strikes her.

During her stay at the hotel she notices a section of rooms that seem to be reserved for guests who have additional medical needs, even surgical ones. The area is more staffed and secluded and reminds her that in a recent meditation class she met a woman who was working on her mindfulness practice in anticipation of a cosmetic procedure she would be undergoing in a few days.

When Lisa leaves four days later, she is rested, energized, happy and has met people she bonded with (including a nice couple whose child was in the wellness day camp program the property provided). All her new tools and commitments to stay on track in body and mind will be facilitated by the ongoing

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online coaching connections with her fitness/diet specialist and psychologist that are set up. She will be kept “close” to the property and supported when she hits home and tracked when

she gets off track. And then *hotel wellness everywhere* will offer her a targeted, super-meaningful discount/incentive to return.

WHAT ARE THE TRENDS THAT COULD MAKE LISA'S WORLD A REALITY?

Lisa's hotel spa journey in the year 2020 is, of course, meant to help you imagine some (but certainly not all) of the key developments we feel will increasingly define the spa – and hotel spa – experience in the next decade.

Now let us try to highlight, more methodically, some of those key trends that are interwoven in her story – and to identify five top spa trends that we feel will gain greater traction by 2020.

1. SPA AND WELLNESS... WITH A HOTEL

The “wellness everywhere” hotel concept is heating up. Consider examples like Westin (with its branded “Heavenly” beds and spas, SuperFoodsRX menus, in-room workout equipment and jogging concierges), or IHG's upcoming EVEN brand (with touches like coat racks that morph into pull-up bars and wellness experts in the gym). But by 2020, the global stress, chronic disease, obesity and time-off-deprivation epidemic will be more intense, and the very concepts of what a “vacation” and a “hotel” are will be transformed: less riotous excess in stately palaces, and more desperately needed experiences focused on de-stressing and true rejuvenation. So, if the “spa” and the “gym” have been cloistered as “amenities” confined to the fourth floor, these walls will conceptually (and literally) get broken down; treatments, classes and new breeds of wellness will percolate across the property, and there will be a sharper focus on the metaphysical power of nature, whether massages under the stars, or guests tending and eating from the on-site gardens.

In addition, the idea of medical tourism will become ubiquitous because of the aging population in many parts of the world, coupled with skyrocketing health care costs. As people travel

Lisa's wonderful world *cont.*

to other countries for medical treatments and procedures, many hotels will set aside rooms for guests with extra needs – with amenities ranging from medical nursing staff to doctor consultations to accommodations for those with disabilities due to age or limitations.

If this “spa and wellness... with a hotel” concept inches close to the programming and spirit of a destination spa, these future healthy hotels will be more approachable – closer to people (not on private lagoons reached by seaplane); more affordable with a less forbidding vibe; and packing a lot of health into shorter stays. And with employer healthcare costs exploding, more businesses will demand (and underwrite) healthier business travel. More hotel spas will square their offerings with “the science of willpower,” removing temptations like endless happy hours and pyramids of brownies in the lobby. But these new mainstream-appealing wellness hotels will not be about austerity and pain – they will interweave fitness, spa, healthy food and innovative wellness activities in a fun, restorative, “happy” package.

And with this healthy hotel wave, destination spas may become more specialized around unique philosophies and goals.

2. LONG-TERM CLIENT CONNECTIONS – TECHNOLOGY, GADGETS & GAMING

At the 2012 Global Spa & Wellness Summit, renowned innovation expert John Kao argued: “Spas must move from the ‘event-driven’ model and create much more *sustainable* connections and experiences.” And by 2020 they *will*, and these more powerful, longer-term spa-client connections will be enabled by a host of new technologies, including online wellness gaming and coaching and an explosion of health gadgets 2.0 (like advanced biometric monitoring devices and mobile tracking apps).

Given the global “diabesity” pandemic, traditional health education is clearly failing, but medical studies show that

coaching is the superior model to galvanize long-term behavioral change. Right now, local coaching networks and industry standards are just being forged, but by 2020, it is expected that every type of spa could enlist coaches, the new critical (and profitable) link between the on-site experience and guests’ ongoing wellness success. New coaching models and price-points will emerge, from group coaching to specialized mindfulness sessions. Current technologies like video, apps, Skype, email and social media (and other platforms we have yet to imagine) will power these long-term connections.

Expect more spas of every stripe, particularly hotel spas, to embrace gaming platforms, both online and on site. Online gaming, with its core elements of rules, levels of achievement, challenges/goals, rewards/badges and a peer/social feedback system, is perhaps the most hyper-engaging way to get people to adhere to changes, whether it is fitness, diet, stress reduction or even beauty challenges. “Gadgets” that make monitoring bio-information and connecting the results online will be truly advanced. Every vital sign, every calorie eaten or burned, every step taken, can get uploaded and shared, so the games spas will offer will get very precise and real.

Today, spas and hotels need to better embrace the avalanche of cheap and easy customer communications technologies available, whether incentivizing people to “check-in” at places like Facebook or foursquare, creating YouTube videos of facilities and treatments, or ensuring easy online booking. But to reach “Lisa” in the year 2020, where video, apps, social media and games have equaled “life” (and websites or print may no longer be used), spas will ratchet up entirely new ways of reaching and dialoguing with customers. Look for online booking to get far more granular, far beyond room or treatment booking to whole itinerary/experience booking.

And the spa-medical technology connection will take off. More (profitable) medical spa procedures will be delivered at hotel spas (through local doctor relations) because it is a very appealing consumer model. Watch for medical-spa connections like spas



as “Telomere Health Centers.” Telomeres are the caps of our chromosomes, and studies reveal that their length is a predictor of diseases like cancer and heart disease. Because exactly what spas provide – stress reduction, healthy diets, exercise and mindfulness practices – can improve telomere health, spas could be perceived as delivering crucial life-saving therapies. And more spas will offer telomere testing (which is launching this year).

3. MORE MENTAL WELLNESS AND MINDFULNESS

Today spas have a major, but mostly unleveraged, opportunity in mental wellness and “mind-focused” programming. Consider: In places like the U.S., 50 % of the population suffers from stress, and one in eight suffers from depression – and the stress/depression wave will only rise circa 2020. Within the next decade, spas, which have been all about body health, will turn to the mind. More spas will partner with diverse types of therapists (like cognitive psychologists and experts in behavioral change), and more spas will create platforms where mental health support and a supportive dialogue about feelings can happen. Brands like Westin are already using positive psychology practices throughout their spas/hotels (from gratitude journals to inspiring messages throughout the property).

In addition, as the medical evidence about the positive impact that mindfulness practices and meditation have on a host of physical and mental conditions keeps mounting (including its ability to strengthen the “willpower” muscle), far more spas will launch such programming. If “massage” has been the “m” word of spas’ past, “mindfulness” is the “m” word of the future.

Today, despite (or perhaps because of) our “wired” world, people are suffering from loneliness at unprecedented rates. And isolation, a disease proven to lead to serious health problems, will only surge by 2020. So, more spas will seize the opportunity – as trusted places of “touch” – to finally address this problem creatively, and become places of true social interaction and community. In line with this concept is the notion that companies – extremely motivated to keep employees healthy, as the high cost of health care eats up profits – will encourage their staff to select the latest incarnation of spa hotel, whether for business or vacation travel.

Jeremy McCarthy, director of Global Spa Operations and Development at Starwood, recently (and perceptively) noted that while much of the industry discussion has been about how spas deliver “healthcare” like hospitals, or “fitness” like gyms,

Lisa's wonderful world *cont.*

we are the *only* industry uniquely focused on delivering pleasure and making people *feel good*. So, while the spa-medicine, spa-fitness, spa-everything intersections will grow, spas will increasingly re-embrace that which is totally, irreducibly, ineluctably “spa” – *the delivery of happiness*. “Happiness” is no longer some vague, intangible concept; it’s a hot scientific field: Studies show happy people reduce their risk of premature death by up to 35%, earn more, and so on. The quest for happiness and mindfulness – and the value of a lived life, true wellbeing (both physical and mental) and pleasure – will matter much more, and spas (not hospitals) will deliver it.

Some spa-mind connections will get very innovative. The latest from brain science suggests that spas could be re-perceived as places where creativity best gets accomplished, given that stress is the number-one threat to the brain’s “innovative thinking” center. Integrated stress-reduction and mindfulness approaches

can actually “re-wire” clients’ brains to create peak performance-thinking conditions – which makes it probable that corporations will prefer (or insist) that their employees stay at a spa hotel that proactively works on helping them stay creative. So, imagine, by 2020, spas could be transformed into creativity/thinking “labs,” rather than places where we escape from “thought.”

4. MEANINGFUL WELLNESS PROGRAMS FOR TOTS TO TEENS

Spas have already become a family affair, but within the next decade the paradigm shift from children’s spa activities focused on pampering and parties to meaningful wellness programs will be well underway.

The acceleration of this trend, identified by SpaFinder as one of its major predictions for 2012, was also evident at the 2012 Global Spa & Wellness Summit, where medical experts



Lisa's wonderful world *cont.*

challenged attendees to create children's programs focused on developing lifelong wellness habits. (According to data presented at the Summit, global childhood obesity is epidemic, with 155 million overweight and 45 million obese children worldwide.)

And first prize, along with a standing ovation, in the Summit's annual "Spa of the Future" Student Challenge Competition went to the University of Denver's Defiant! spa concept that rejected the typical "pampering-patronizing-pink-and-sparkling" manicures found in teen spas in favor of programs that address the emotional, physical and social needs of teens.

The rapidly growing demand on the part of travelers to be able to take teens and tots along for the spa ride – as well as parents' growing concern about childhood obesity and wellness – will help spur the concept of family spa-ing into a more mainstream one, and more spas and hotels will offer creative wellness programs for the entire family.

Also, look for hotels to reevaluate age restrictions in fitness/spa areas, offering what could be called "all-day wellness babysitting" – something many properties think parents will be overjoyed about. In fact, by 2020, sports and adventure programs like those found at Schloss Elmau Luxury Spa & Cultural Hideaway in Germany (think "family spa," "nature spa" and all-day "kids' club") will be the norm, not the exception.

5. TAPPING INTO WATER'S BENEFITS

Spa and water have been ubiquitous since the Roman Empire, but by the late 1960s, thanks to an abundant water supply and indoor plumbing, "taking the waters" in the industrialized world often meant a nightly bath and at-home Jacuzzis.

However, thinking that the unlimited use of water by an exploding global population (projected to be nine billion by 2050) could continue indefinitely is rapidly proving to be a falsehood. Many climate experts are predicting that by the

year 2020 there will be a global water crisis. As healthy water becomes scarcer and more prized, spa will return to its roots as a center for healing and social water experiences and dramatically influence how hotels and resorts allocate water.

Already we are seeing hotels building rooms with low-flow showers but without bathtubs. As well, some that have bathtubs are taking away the stopper to discourage the use of a huge amount of water for just one person.

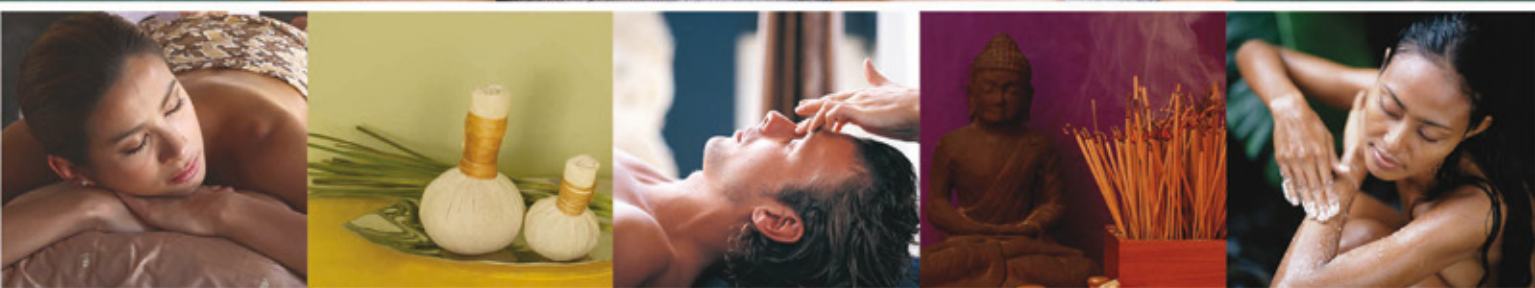
How will this new water awareness play out? Fast forward to 2020. The healing benefits of water and the body's desire to soak tired feet and limbs in warm or hot mineral springs are enthusiastically sought, and available, at the hotel's spa. Like in Roman times, the spa (an acronym for *sanitas per aquam*, which means "health through water") is the favored meeting place in hotels (and in communities). Imported water in plastic bottles is no longer served; rather, water is bottled at the source – the hotel. Weary travelers still seek a soak in warm water, and many people (especially the elderly) like exercising in pools. Entire families enjoy water circuits and waterfall plunges. Plus, the latest technology continually cleans the water (without chlorine), recycles it and infuses it with energy and minerals that offer life-enhancing benefits.

And with stress at an unimaginable level in 2020, the quick stress-reducing benefits of water therapy (as well as mindfulness, exercise and massage) will likely become a natural part of every hotel guest's experience. Look for the spa's "capture rate" to near the 100% mark.

Spa experiences will now be balanced with the industry's global initiative to put emphasis on the health of water. For a hotel not to be part of the solution will be unfathomable.

THE BOTTOM LINE FOR SPA 2020?

Expect the conversation to change: Instead of hotels having a spa, there will be talk about *spas* that have a hotel. ●



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