Representatives from more than 45 nations gathered at the 8th annual Global Spa & Wellness Summit (GSWS) in Marrakech, Morocco, in September this year, shining a spotlight on the future of the $3.4trn (£2.11trn) wellness industry. The agenda tackled topics including: architecture and design’s influence on experience and sustainability; the seismic generational and gender shift; the impact of technology on human interaction and Africa’s role in wellness.

“This year’s GSWS agenda included futurists, marketing gurus and, of course, spa and wellness experts,” said Susie Ellis, chairman and CEO of the GSWS. “The journey we took together into our future was full of game-changers, and we’ve identified 10 major shifts that will impact how we will approach wellness in the future.”

* All figures are based on SRI Research and part of the 2014 Global Spa & Wellness Economy Research Report.

1. Architecture and design reboot
For decades, the spa industry has relied on Asian influences to guide not only spa menus but also the look and feel of its facilities. Dutch architecture maverick Bjarke Ingels told delegates: “You not only have the ability, you have the responsibility to change the spaces we live in.” His envelope-pushing designs promise to inspire a complete re-think into how to approach spa architecture and, importantly, create sustainable designs that increase, rather than decrease enjoyment. Ingels’ design for a waste-incinerator-cum-ski-slope, currently under construction in Copenhagen, Denmark, is a case in point.

2. The future is young and female
Spa and wellness marketers need to cast a wider net by focusing more on millennials – those born between 1980 and 2000 – rather than the ageing, time-rich baby boomers who have been the focus to date. A massive demographic shift from male to female is also occurring. Due in part to living longer, and increasing wealth and education (70% of students in universities today are women), women’s influence will grow rapidly.

“The population of women in cities is massively on the rise and wealth is being transferred from men to women,” said Kjell Nordström, the Swedish economist and co-author of Funky Business.

3. Keep it real
The demand for authenticity, the seeking of local, indigenous experiences in spa and wellness treatments, is increasing, driven by mass urbanisation and the rise of millennials.

“Increasingly, it’s not the destination that matters, it’s the experience,” said Peter Greenberg, CBS News travel editor. “Generic luxury no longer satisfies most of us. There is a growing desire to find the heartbeat of a place and culture and then share it with the rest of the world on social networks.”

4. Revival of hot springs
In Europe and Japan, thermal/mineral bathing has an ancient pedigree. Today ‘taking the waters’ is experiencing an incredible upturn, with nearly 27,000 facilities across 103 nations creating an industry worth $50bn. The industry is intensely concentrated: 10 countries account for 85% of revenues. Japan and China alone comprise a staggering 51% of the market: in Japan, there are thousands of onsen (hot springs); and there is massive, ongoing investment in resorts in China. The largest project of its kind is the Chinese Mission Hills Haikou spa, covering 40sq km and attracting 3,500 visitors a day. The property also boasts the world’s largest spa, 168 natural mineral pools; 90 treatment rooms and 10 golf courses, hosting amongst others Omega Mission Hills World Cup, the so-called ‘Olympics of golf’.

5. Urbanisation not suburbanisation
The future will move away from suburbanisation and towards urbanisation. According to Terry Stevens, managing director of international tourism consultancy Stevens & Associates, 80% of the world’s population will live in urban settings by 2030. Economist Kjell Nordström told delegates that the perception of the world as 200 countries will quickly shift to one of 600 cities. Inhabitants will crave nature and simplicity but also extreme fitness, beauty and wellness.

6. Wellness tourism generates the big numbers
Less than a year ago, the GSWS and long-term research partner SRI International launched the concept of wellness tourism to the world. Today, governments and companies are embracing this key market segment. As a result, it now has an estimated value of $494bn and growth of 12.5% year-on-year.

Top zen: Spas of the future
Hildegard Dorn-Petersen FCSI looks at how the growth of the spa and wellness sector will influence the hospitality industry and modern living.

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HUNTER:

1. Authentic African renaissance
   Indigenous and authentic experiences will lead many travelers to Africa, a continent that will be at the heart of this wellness tourism growth. But Magatte Wade, a Senegalese entrepreneur, named one of the 20 Youngest Power Women in Africa by Forbes and awarded the first-ever Leading Woman in Wellness award at this year’s Summit, had some words of warning for the industry.

   “Don’t bring your Swedish massages to Africa and ask us to ignore the healing traditions we’ve had for thousands of years. Africa has its own health, beauty and healing arts that must be respected,” she said.

2. Technology on fast-forward
   According to Paul Price, chief executive of retail and marketing consultancy Creative Realities, keynote speaker and expert, technology will not only remain at the forefront of our world but it will embed itself even deeper, altering the way we do everything – from how we shop to how companies market to us.

   Price told delegates: “Don’t be seduced by bright and shiny objects and don’t let the technology drive your decisions. Instead, consider moving your tech department into your marketing department so the IT team is driven by the marketers, not the other way around.”

3. The loneliness epidemic
   “We used to die of old age, soon we’ll be dying of loneliness,” said economist Kjell Nordström. Urbanisation, technology and demographic shifts have driven an overarching sense of “aloneness” that spa and wellness centres will help abate. Thirty years from now, 60% of households will be single. As an industry, spas can combat this trend, delivering connectedness in a world that has created a dependence on screens for company, he said.

4. Wellness communities are back
   Before the economic downturn there was a lot of talk of ‘spa real estate’ but many of these projects crashed along with the economy. Now whole communities – and even whole cities – are designed and branded with wellness at their core. Research released at the 2014 Summit showed that this market is now valued at $100bn.

   “Mixed use properties and the combination of hotels and residences have emerged as a potentially viable financial model in this sector, though one that still requires careful planning and understanding of its nuances.”

5. The intelligence
   Global spa industry
   Now valued at $94bn
   - Spa facilities $74bn (78.6%)
   - Spa investment capital $19bn (20.2%)
   - Spa education $800m (0.9%)
   - Spa media/education/events $200m (0.2%)
   - Spa consulting $100m (0.1%)

   Growth of spa industry:
   + 58% from 2007-2013

   Regional growth 2007-2013
   - Europe: $29.8bn (+62%)
   - Asia-Pacific: $18.8bn (+65%)
   - North America: $18.3bn (+35%)
   - Latin America/Caribbean: $4.7bn (+86%)
   - Middle East/North Africa: $1.7bn (+134%)
   - Sub-Saharan Africa: $800m (+186%)

   Wellness tourism: Expanded to $494bn in revenues
   + 12.5% from last year

   Wellness-focused trips from 524m (2012) to 586.5m (2013)

   America leads in wellness tourism expenditure by global region
   - America $178.1bn
   - Europe $156.3bn
   - Asia $125.9bn
   - Middle East $13.3bn
   - North America $84.1bn
   - Latin America/Caribbean $7.3bn

   Wellness tourism: Changed to $44bn in revenues
   + 12.5% from last year

   Growing nearly 50% faster than global tourism overall

   Wellness-focused trips from 524m (2012) to 586.5m (2013)

   Future opportunities for FCSI members
   “As foodservice consultants, we need to free ourselves from stereotypical thinking, planning just kitchens, back of the house or bars. We do not have to reinvent the wheel, but can rely on an international network of colleagues, with whom we can exchange information, knowledge and experience to realize future projects all around the globe.”}

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