

2015

Spafinder
Wellness365®

12TH ANNUAL
TRENDS REPORT

Top 10 Global Spa & Wellness Trends Forecast

2015 TRENDS REPORT

Top 10 Global Spa and Wellness Trends Forecast

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Our goal when researching and writing our annual Top 10 Global Spa & Wellness Trends Forecast is to provide the insight and information companies in the wellness industry will need to make sound decisions in the year ahead—and help businesses, consumers and the media understand how economic, cultural and social shifts will impact not only our industry, but also people’s lives.

In the sea of trend lists appearing each new year, we think our unique forecast stands out, taking an intense, research-driven view of what’s trending across the global wellness landscape from spa experiences to fitness, beauty, travel, nutrition and even workplace wellness. And unlike a standard slideshow, our 70-plus page report dives deep into the why, how and where each trend is developing.

Each year themes emerge, and this year, we discovered that in a world overwhelmed by technology, there is a search for simplicity; as well, a harkening back to lost, healthier ways of living. Read on to discover the boost in meditative “Forest Bathing” experiences and more retreats where trees and silence take luxury “Beyond the Stars.” New master-planned “Wellness Communities & Cities” offer “front porch” values like growing one’s food and knowing your neighbors. And in trends like “My Fitness. My Tribe. My Life,” we see how social fitness will continue to transform the very ways people live, socialize, dress and travel by answering basic human needs for true community in an age of loneliness.

In the global quest for the authentic and indigenous, the trends take an unexpected turn, with wellness traditions from Islamic worlds ascending, and food and beauty ingredients from regions like the Middle East and Africa set to grab headlines. And one trend would be unthinkable just years ago: the wave of medical/recreational marijuana legalization across the U.S. (and soon in Uruguay and likely other global regions) means cannabis is getting a “wellness makeover,” with new spa, beauty, travel and yoga connections.

We sincerely hope you enjoy our 2015 report and like us, find new reasons to be excited about this amazing industry within which we are all grateful to work. Here’s to the year ahead!

Happy Trending,
The Spafinder Wellness 365 Team

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The 2015 Spa & Wellness Trends Forecast is developed by a team of research analysts, editors and industry experts, and is based on ongoing surveys of the 20,000-plus spa, wellness and beauty providers in the Spafinder Wellness 365 Network, thousands of travel agents and hundreds of thousands of consumers—as well as interviews with industry leaders and extensive analysis of current market research.

Please give credit to this report when quoting or referring to one of the trends.

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1

Forest Bathing

MINDFULNESS MEETS NATURE

"It is not so much for its beauty that the forest makes a claim upon men's hearts, as for that subtle something, that quality of the air, that emanation from the old trees, that so wonderfully changes and renews a weary spirit."

- **ROBERT LOUIS STEVENSON,**
Forest Notes, 1905



Forest Bathing

Mindfulness Meets Nature



Blackberry Farm

THE TREND HIGHLIGHTS

- Governments and parks developing forest therapy centers/trails – more associations forming to promote “forest medicine”
- Forest bathing getting refined into “forest therapy” – from certification of specialists to licensing of doctors in “Forest Medicine”
- More doctors prescribing time in forests/nature
- More forest bathing programming at more high-profile wellness/spa retreats worldwide
- More extreme in-nature spas/retreats – from wilderness-wellness resorts with chic “nature pod” designs to more naturalist-guided wilderness excursions

BACKGROUND

The term “forest bathing” has nothing to do with water, and is more than just a poetic way of describing a “walk in the woods,” something humans have, of course, been doing for five million years (if never less so than today). The Japanese government coined the term in 1982, a translation of “shinrin-yoku,” which literally means “taking in the forest atmosphere.”

This Japanese concept revolves around a deceptively simple practice: quietly walking and exploring, with a mind deliberately intent on – and all senses keenly open to – every sound, scent, color and “feel” of the forest, in all its buzzing bio-diversity. With forest bathing (and the increasingly expert-led “forest therapy,” or shinrin-ryoho), mindfulness meets nature, and the goal is to “bathe” every physical cell and your entire psyche in the forest’s essence. No power hiking needed here; you just wander slowly, breathe deeply and mindfully, and stop and experience whatever catches your soul – whether drinking in the fragrance

FUELING THE TREND

Evidence Blazing Trail

You could argue that, among wellness approaches, there has perhaps been no greater disconnect between the positive medical research and how much time-in-nature has actually been “prescribed.” A study from the Universities of Kansas and Utah (U.S.) found that three days of wilderness hiking improved scores on creativity tests by 50 percent. Meanwhile, a large recent study from the University of Michigan and Edge Hill University (U.K.) found that nature walks significantly combat stress and depression.

Urbanization

It’s no surprise that densely urban places like Japan and Korea were first to rush to forest bathing, but as the world undergoes the most intense urbanization in history, we’re all in a sense “turning Japanese.” Fifty-four percent of us now live in urban areas, and that number will rise to 66 percent by 2050.³ In 1990 there were only 10 mega-cities (10 million+ people); now there are 28, and by 2030 there will be 41. City living puts nature and simplicity at a higher premium, which is why so many more Chinese people are taking “Blue Sky Holidays,” to escape the mega-city pollution and get into nature.

Disappearing Forests Make Experience Precious

Forests now cover 31 percent of the planet’s land area, and while over half of the Earth’s forests have been destroyed in the last 10,000 years, the majority fell in the last 50.⁴ A University of Maryland (U.S.) and Google Earth⁵ collaboration reveals that roughly 50,000 square miles of forest are erased every year – the equivalent of 36 football fields a minute.

of that little wildflower, or really feeling the texture of that birch bark.

Poetic? Pleasurable? Yes. But it’s the science behind the practice that’s now taking forest bathing global, as a growing mountain of evidence indicates there’s strong medicine for human bodies and brains that a forest uniquely dispenses.

Forest therapy studies have been led by Japan, whose government funded \$4 million in research from 2004-2013. Today, the research database PubMed returns 100+ studies on the health impact of forest bathing, including studies indicating that it significantly lowers blood pressure (-1.4 percent), heart rate (-5.8 percent), cortisol levels (-12.4 percent) and sympathetic nerve activity (-7 percent) compared with city walks, while also alleviating stress and depression.¹ The most provocative of these studies conclude that exposure to phytoncides, the airborne, aromatic chemicals/oils emitted by many trees, have a long-lasting impact on people’s immune system markers, boosting natural killer (NK) cells and anti-cancer proteins by 40 percent.

It’s research like this that has made forest bathing a pillar of preventative medicine in Japan, and increasingly common in places like Korea (where it’s called “salim yok”), Taiwan and Finland. It may be hard to grasp what a serious, widespread practice this is in Japan, where a quarter of the population partakes in forest bathing and millions visit the 55+ official Forest Therapy Trails annually, prompting a plan to designate an additional 50 such sites within 10 years. Visitors to Japanese Forest Therapy Trails report that they’re asked to have their blood pressure and other biometrics taken pre- and post-“bathing,” in the quest for ever-more data.

Major media worldwide² have been ramping up coverage of the fascinating medical evidence. And in an era of unprecedented urbanization and digitization (with the average person now “bathing” his face seven hours a day in the glow of a screen), we humans are in the throes of a forest-deprivation crisis. The convergence of these two trends – growing awareness of the medical benefits of time spend in forests, and alienation from this essential, yet increasingly exotic, human experience – will drive demand for forest bathing experiences in the year (and years) ahead.

A woman “forest bathes” on one of the many trails in **Finland’s Saarijärvi Region**. Nearly three-quarters of Finland is covered with forest and the country has been a leader in promoting the benefits of spending time alone in nature.



ASPECTS OF THE TREND

More Governments Supporting & Forests and Associations Promoting

Japan took the lead with the launch of its Association of Therapeutic Effects of Forests in 2004, but today more and more nations are stepping up development and promotion. A government-supported taskforce on forests and human health launched in Finland in 2007. Things went global when the International Society of Nature and Forest Medicine (INFOM) debuted in 2011 and went on to establish a North American chapter established in 2013. Korea is investing \$140 million in a new National Forest Therapy Center,⁶ slated to open soon. And more government bodies and wildlife organizations are now yoking their forest offerings to the practice of, and science behind, forest bathing, whether it’s the New York State Department of Environmental Conservation or the Canadian Wildlife Federation.

Specialists & Designed Trails

Increasingly, forest bathing is evolving into professionalized “forest therapy,” involving certified specialists and specially designed trails. In Japan, forest therapy “bases” are selected by researchers, with forest therapy led by licensed professionals. A “Health from the Forest” project (through a partnership with the Finnish Forest Research Institute) has created special “engagement-based” trails in Finland, France, Luxembourg and Sweden. In the U.S., the Association of Nature and Forest Therapy Guides & Programs

provides training and certification around the country, and they even offer Forest Therapy Wellness Retreats that combine a spa or hot springs resort stay. What was once a “walk in the woods” will continue to become more evidence-based and expert-led.

Doctors Prescribing Nature

An insightful *Slate* article explores how more doctors are now prescribing time in parks/forests, just as they did in the 19th century when unwell people were packed off to health resorts in the woodsy Swiss Alps or Adirondacks, before the rise of the pharmaceutical era. The U.S. pioneer in the “prescribing nature” movement is Dr. Robert Zarr, whose Park RX program, started in 2013 by multiple government agencies, has written hundreds of prescriptions for young people with conditions like asthma and obesity to get out and move in nature. Park RX is just one of a growing number of global “nature prescription” initiatives. New Zealand’s “Green Prescriptions,” used by over 80 percent of the nation’s general practitioners, involves writing a nature prescription (“GRx”) and then supporting patients with follow-up phone calls and/or meetings. In Wales, a Forestry Commission program, Actif Woods, has doctors prescribing woodland walks to combat conditions like heart problems and depression. And in an interesting global development, INFOM approved certifying “Physicians in Forest Medicine” in 2014.

In Japan, forest bathing is becoming a staple of mainstream medicine. Companies are starting to

include forest therapy in healthcare benefits. Forest therapy bases link to both hospitals and hot springs/ medical spa establishments, with many offering free wellness check-ups right in the forest. And last year saw the launch of a “Walking Forest Therapy Roads® with a Doctor” program, giving people an opportunity to see how even one dose of forest therapy impacts their stress levels and NK cells.

Forest Therapy Products

In a related trend, forest essential oils with phytoncides will make their way into more spa experiences and products. Spas in Korean cities like Metro Spa Cabin (Seoul) and Spa Land (Busan) simulate forest bathing with saunas infused with negative oxygen ions and phytoncides. And we’ll see more technology aimed at bringing the forest indoors, such as the “phytoncide generating system” developed by Korea’s BlueN to infuse office spaces, hospitals, homes, hotels, etc.

Wellness Retreats Adding Forest Bathing Programs

There are too many hot springs hotels and spas that integrate “forest bathing” across Japan, Korea, Taiwan, China and countries in woodsy Northern Europe to name. Now forest bathing programs are not only moving West, they’re appearing on menus at several high-profile destinations, with properties putting their own innovative spins on the concept.

EXAMPLES

- Blackberry Farm, a 30-year-old resort gem in Tennessee’s Smoky Mountains (U.S.), just opened Wellhouse, a comprehensive spa/wellness center, with a specific focus on Japanese forest bathing. Its new “Deep Healing Woods” activities (from in-forest yoga and meditation to endurance hikes) all end at an platform deep in the woods, and the spa uses a rich harvest of forest-found, seasonal flowers and herbs, etc.
- Award-winning Woodloch Lodge in Pennsylvania’s Pocono Mountains (U.S.) has added a Forest Bathing program, with walks led by a master herbalist



Blackberry Farm, in Tennessee’s Smoky Mountains (U.S.), offers “Deep Healing Woods” activities including in-forest yoga and meditation based on Japanese forest bathing programs.

teaching guests the shinrin-roku way: mindful contemplation, deep-breathing and foraging for edible plants/remedies.

- Stowe Mountain Lodge, a ski-and-wellness landmark in Vermont (U.S.), has added a “Wei to Wellness” package, starring a “Mindful Snowshoe Tour” based on Japanese forest-bathing principles.
- In forest-dense Canada, the luxury wilderness resort Trout Point Lodge in Nova Scotia has made forest bathing a centerpiece.
- In the U.K., Lake District country house/spa resort Armathwaite Hall has begun a “Forest Bathing Spa Package” led by their yoga master.
- In Italy, Miramonte Boutique Hotel (Meran, South Tyrol) combines spa with “forest therapy.”
- Austria’s Hotel Forsthofgut’s waldSPA (forest spa) (Leogang, the Alps) lays claim to being the first “wellness center forest” in Europe, with guided forest bathing and barefoot forest walking paths.
- In 2016 look for the high-eco-design Chedi Tomakomai (a GMH property), set in lush forest on the Japanese island of Hokkaido, to make guided forest therapy and hot springs the focus of its wellness center – another sign that “forest bathing” is moving into serious luxe resorts.



Kakslautten Arctic Resort

Finland's **Kakslautten Arctic Resort**, with its glass igloos complete with saunas, is set in the wilderness of Lapland. Forest-covered Finland is tapping into the rising demand for natural quiet with a tourism campaign centered around the tagline "Silence Please."

Deeper-in-Nature Wellness Retreats

The "Earthing" trend from the Spafinder Wellness 2013 Trend Report focused on the innovative approaches spas and wellness retreats were taking to immerse guests in nature. Just two short years later, it would take a thick book to chronicle all the creative ways properties, treatments and fitness activities are delving deeper into nature. As part of this ongoing trend, people are becoming hungrier for intimate, quirky eco-wellness-wilderness lodges rather than the "inward-turned" and amenity-driven spa resorts of yore. The new luxury: using a suspension bridge to reach your rustic jungle tree house, where the electricity may flicker but you have 24/7 eye contact with exotic wildlife species – an experience found at Peru's spa-nature resort Inkaterra Reserva Amazonica.

We'll Continue to See

- More **jaw-dropping tree house, igloo, and other ingenious "nature-pod" rooms and spas** seamlessly, sustainably set in forests and jungles. Examples include Finland's Kakslautten Arctic Resort, with its glass igloos complete with saunas; Whitepod Eco-Luxury Hotel in the Swiss Alps, where geodesic dome-rooms blend into the snow but you can order "in-pod" massages; and Treehotel (Harads, Sweden), which is all about "the significance of trees for human beings." Highlights include architecturally-stunning tree-rooms perched in the Lapland forest and guides who will take you to a safe place deep in the forest, set up a fire, cover you in reindeer skins, and let you experience the beauty and silence alone (although you can always call if you can't stand the solitude.).
- The tree house concept is beyond "ascendant," whether at Costa Rica's Nayara Springs Resort, where spa treatments are taken on lanais dangling out in the rainforest; the U.K.'s venerable Chewton Glen, where "treetox" retreats take place in their new luxe tree houses; or at Sugar Beach in San Lucia, where every spa treatment room is a tree house hidden in the jungle, and a maze of outdoor walkways emanates from the property tree house cluster.
- There are nearly as many **wildlife guides at spa/wellness properties** as there are in national parks. Whether at Costa Rica's Finca Rosa Blanca Inn, with its on-site naturalist leading guests through the rainforest; or at Puerto Rico's St. Regis Bahia Resort, with its bird-watching tours in the Caribbean's only "gold" certified Audubon Sanctuary.
- **That natural "silence" is platinum.** Back in 2010 Spafinder named "Stillness" a top trend, and given the steady dialing up of media, technology and work "noise," properties that deliver silence have never been more golden. But people want to hear a pinecone drop (not just a lowly manmade "pin"), and they "digitally detox" more successfully when there's a busy slate of out-in-nature experiences to fill the void. Forest-covered Finland is tapping into the rising demand for natural quiet with a tourism campaign centered around the tagline "Silence Please." Their strategy: "In the future, people will be prepared to pay for the experience of silence." Actually, that future has already arrived. It's hard to imagine an extraordinary new property like Fogo Island Inn, set on a remote island off the coast of Newfoundland, Canada, appearing a decade ago,

when the sun-surf-sand vacation model reigned supreme. Fogo Island Inn's marketing materials promote silence, "finding yourself at the four corners of the world," and "miles and miles of blissful nothingness."

- **More urban-accessible forest retreats**

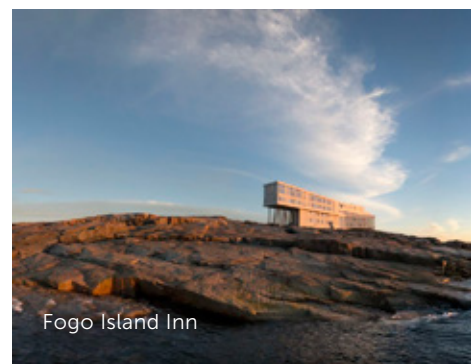
Because stressed-out city-dwellers need forest healing most. A wonderful example: the UK's Center Parcs, a collection of five, very popular "forest villages" offering packed menus of water, fitness and spa activities spread out across 400 woodland acres. (Their latest property, Woburn Forest, is just an hour from London.)

Don Camilleri, director of Hospitality and Leisure Concepts and former development director of Center Parcs UK, noted, "Center Parcs resorts' forest settings create a unique feeling of wellbeing."

We don't necessarily use the term 'forest bathing' yet, but it's a great way to describe the experience guests can enjoy being together and getting closer to nature, while taking a short break from everyday life. At any one time, over 15,000 people are soaking up the forest at one of the five Center Parcs villages in the UK. And our Aqua Sana spas have also been designed to really immerse guests in 'forest wellness.'" Center Parcs villages certainly hit diverse forest-immersion notes: the spa pools are surrounded by forest, there's a menu of guided forest walks, and working with Austria's Schletterer Consult they've created innovative Thermal Suites that infuse oxygen and forest-extracted essential oils, salts and minerals into the air so people can "forest bathe" even when it rains.



Treehotel



Fogo Island Inn

Fogo Island Inn, set on a remote island off the coast of Newfoundland, Canada, invites guests to enjoy "miles and miles of blissful nothingness."

Treehotel (Harads, Sweden) is dedicated to "the significance of trees for human beings." Guests enjoy tree-rooms perched in the Lapland forest, and guides escort them to a safe place deep in the forest where they are covered in reindeer skins and can experience the beauty and silence alone.



Left: **Treehotel**
(Harads, Sweden)

Below: The Forest Bathing program at the award-winning **Woodloch Lodge** in Pennsylvania's Pocono Mountains (U.S.) features walks led by a master herbalist who teaches guests shinrin-yoku techniques.

THE FUTURE

Forest bathing – it may be a poetic concept, but there's powerful evidence that it's also medicine for our bodies and mind, offering stress-reducing, immune-boosting benefits that you simply can't get anywhere else. It's a uniquely accessible (download one of the many forest finder apps) and *perfect* practice for our stress-crushed lives, with shinrin-yoku giving people a framework for experiencing the forest in a new way: with intent, mindfully, meditatively, with every sense open.

Nature prescriber, Dr. Zarr, has stated⁷ that the effects of nature are still "not on enough people's radar," even though "we've touched on something exciting." Our prediction is that will change, and change will take many forms. That includes the advent of "forest schools"⁸ – where today's over-scheduled, screen-addicted young children are moved entirely into nature as their classroom – first established in Swiss Waldkindergartens, and now catching on in places like the U.S., U.K. and Canada.

In short, forest therapy will be supported by more governments, promoted and developed in more forests, and incorporated into more wellness/spa retreats. Meanwhile, mounting medical evidence regarding forests' and green spaces' impact on human health will continue to lead to innovations in architecture, urban planning, and workplace, hospital, school and home design. And while more people travel to forests in search of health and rejuvenation, experts will find creative ways to bring more green corridors to where more and more of us live: the city.



Woodloch Lodge

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- 1 Research undertaken on 600+ subjects by leading forest medicine scholars, Juyoung Lee and Yoshifumi Miyazaki of Chiba University, and Qing Li from Nippon Medical School, Japan.
 - 2 BBC, "Green Spaces Can Save NHS Billions", 2013. *The New York Times*, "The Claim: Exposure to Plants and Parks Can Boost Immunity," 2010.
 - 3 United Nations, World Urbanization Prospects, 2014.
 - 4 Worldwildlife.org, 2014.
 - 5 Results of global forest tracking from 2000-2012, published in *Science*, 2013.
 - 6 *Outside* magazine, "Take Two Hours of Pine Forest and Call Me in the Morning," November 2012.
 - 7 *Slate*, "RX: 50 mg. Nature," July 2014.
 - 8 NPR Radio, KQED, "Forest Kindergartens Push Back Against Academic Focus for Young Kids," November 2014.

2

Cannabis: New Spa & Wellness Connections

...FAR MORE THAN "HOT, STONED MASSAGE"

"Make the most you can of the Indian Hemp seed..."

- **GEORGE WASHINGTON,**
First President/Founding Father,
of the United States, 1794



Cannabis: New Spa & Wellness Connections

...Far More Than “Hot, Stoned Massage”



Dixie Elixirs

THE TREND HIGHLIGHTS

- Cannabis businesses adopting the language of wellness, and look and services of spas
- Cannabis dispensaries and clubs adding free massage, yoga, meditation, acupuncture, etc.
- Traditional medical spas prescribing medical cannabis
- Cannabis “wellness tourism” packages with spas as centerpiece
- Non-high-inducing cannabis topicals: from pain-relieving lotions to beauty products
- Cannabis-branded day spas – and more spas generally using cannabis products
- More “yoganja” classes
- Cannabis as super-food: hempseed and hemp milk as new “it” products

NOTE: We’re *reporting* on (not advocating for or against) the legalization of cannabis. We are forecasting that when legal markets for use open up, new intersections with spa/wellness will be created. Marijuana use is still illegal in most nations, and this trend covers only those countries/regions where legal change has happened, or is underway.

BACKGROUND

Unless you’ve been really, um...spaced out, you’ve heard about the wave of legalization for medical and recreational marijuana use in the U.S. – or in a country like Uruguay (the first nation to legalize possession, coming in 2015). You’ve also seen the buzz of media on how ramped-up legalization has spawned an explosive (what they dub) “cannabusiness” market, led by sophisticated “ganja-preneurs” who are re-inventing who consumes marijuana and the many ways it can be used – essentially taking it from dorm room to boardroom, from dime-bag to Hermes bag, and from counter-culture to over-the-counter, with sleek dispensaries that are channeling Apple stores. After decades of prohibition, marijuana is suddenly undergoing a makeover: more people worldwide view it as socially acceptable and medically important, and whole new markets and products are busily being invented. Once-lowly “weed” has become a real industry, growing like weeds.



Harborside Health Center

Harborside Health Center (Oakland & San Jose, California) is one example of North American cannabis dispensaries and European cannabis clubs adopting the look and menus of spas.

FUELING THE TREND

Medical Evidence

Because cannabis has been long criminalized (legally equated with substances like heroin), both medical studies and pharmaceuticals have been held back. Over 100 trials on medical cannabis exist (the vast majority positive), with the strongest evidence of benefit for nausea, wasting in AIDS and cancer, epileptic seizures, multiple sclerosis, glaucoma and chronic pain. On the recreational side (for stress-reduction, help sleeping, etc.) the issue is cannabis compared to what. Alcohol accounts for more health damage, deaths and violence than all illicit drugs combined, and people are far more likely to become dependent on alcohol than cannabis.³ And, according to a 2013 UCLA meta-review,⁴ even regular pot smokers have no greater risk of cancer.

Decriminalization Wave

The U.S. (obviously) has no lock on cannabis use: between 125-227 million people globally use it, with Africa, Oceania, Europe and North America having highest usage rates⁵. The cannabis legality map is a complex patchwork of “green” (indicating those dozen nations where personal and/or medical consumption is either legal or decriminalized, like Canada, Norway, Peru, Portugal, Spain, Switzerland, etc.), even more “gray” (nations where it’s technically illegal but tolerated, like across most of Latin America and Europe) and “black” (firmly criminalized, like China).

But blanket prohibition is on the decline. In 23 U.S. states medical marijuana is now legal, and Oregon, Alaska and Washington D.C. just joined Colorado and Washington in legalizing recreational usage –

unthinkable five years ago. In 2016 many more states (like California, recreational) are expected to put it on the ballot. And NBC News recently stated that national U.S. legalization of marijuana is attaining “an aura of inevitability.” Globally, everyone will be watching trailblazer Uruguay in 2015, the first nation to legalize possession for citizens. Every week, you read about different national legislatures debating more legalization – from Austria, to Australia, to Colombia, to Jamaica (where activist associations list “wellness, travel and spas” as some key markets ripe with opportunity). And even nations that mete out harsh punishments for possession are investing in the market. In fact, more than half the medical/wellness cannabis patents filed with the World Intellectual Property Office have come from Chinese companies⁶.

Stress Salvation Seeking

Humans are crushed by unprecedented stress, and the desire to “re-set” our toxically overloaded minds is fueling a rise in interest for both meditation and marijuana. Many purists would reject the latter, but many mere, mortal humans prefer a little cannabis to the happy hour, Xanax or Ambien hangovers. Almost every “stay” spa serves wine, and wine and beer are of course slathered over people in treatments. So, if many wellness businesses will “say no” to a THC cannabis connection (even though it’s natural, herbal “medicine”), others will ponder what that would look like with open minds.

Marijuana Remade

A key aspect of this transformation is in language, with “cannabis” now replacing “marijuana” as the more scientific, less historically-fraught term, as there are thousands of uses (from textiles to food) for this super-plant that has been used by humans for medicinal purposes for 8,000+ years, with the modern prohibition representing the historical anomaly. There are 66 unique chemical “cannabinoids” locked within the plant (many with therapeutic uses), even if the world tends to narrowly associate it with just one, Cannabis Sativa with THC, the only component that actually produces a “high.” In now-legal medical/recreational markets, the way that psychoactive THC is getting delivered is being radically innovated: less healthy “pot smoking” is being replaced with odorless new vaporizer pens (“vape” was Oxford Dictionaries’ 2014 “word of the year”) and with haute cuisine edibles that could grace a *Bon Appetit* cover. And non-THC cannabinoids are seeing new applications for problems like pain, anxiety, epilepsy, MS and other neurological disorders, and are the key ingredient in more and more topical lotions and beauty products.

Going High End

The global media delights in recounting the ways that cannabis is getting a classy re-branding in new commercial markets like the U.S. You read about advertising agencies (see: Cannabrand) specializing in bringing “elite cannabis brands” to professional, well-heeled consumers. You read about luxury cannabis tours in new recreational markets like Colorado and Washington state that pair tastings with “cannabis sommeliers” with gourmet cooking classes, and a lot of spa-ing. You read about new media dedicated to reviewing cannabis like fine wine: for example, the website Leafly, with its 70,000+ strain and dispensary reviews (covering the U.S., Canada and Spain); or *The Denver Post*, the first mainstream newspaper to hire dedicated pot reviewers. You read about companies like Dixie Elixirs¹ (which, produces slickly branded edible products that would not look out of place on the shelves of Whole Foods”) duking it out with Bob Marley’s estate’s new brand, Marley Natural, to become the global “Starbucks” of cannabis. You



Dixie Elixirs

Dixie Elixirs™, THC-infused cannabis handcrafted sodas, come in a variety of flavors and are available in 5mg, 40mg and 75mg cans.

read about new U.S. reality TV shows (“Pot Barons of Colorado” or “The Marijuana Show,” a kind of “Weed Shark Tank,” where entrepreneurs pitch cannabis business ideas), or about the new Chilean channel, Cultiva TV, educating on marijuana’s benefits to win national legalization. In Europe, you read about “cannabis social clubs” blossoming in countries like Spain (700+ clubs), London (75) and France (400), where marijuana sales are technically illegal but personal possession is not generally prosecuted. In the global financial press, the tone is appropriately serious given the major capital investments happening in a market suddenly estimated to be worth \$50 billion in the U.S. and \$200 billion worldwide.²



In late 2015, members of Bob Marley's family are launching **Marley Natural**, which is dedicated to cultivating and crafting marijuana-hemp-infused products with "respect for nature, responsibility and compassion."

Forecasting, Not Pronouncing

While the cannabis industry is working overtime to place all consumption in the "wellness column," the opening up of commercial markets of the high-inducing variety certainly brings new problems. Experts point out that psychoactive cannabis can be habit-forming and impact memory and other cognitive skills. They worry that a looming "Big Marijuana" will lower prices and market intensely, luring in new users (including teenagers). Proponents of open markets argue that global prohibition has failed spectacularly, creating a violent black market that puts billions in criminal hands, preventing useful medical research, and depriving people of the right to pursue a stress-reducing pleasure that is far less dangerous to their health than culturally-celebrated alcohol. They further argue that only commercial markets can ensure product quality and safety.

Given cannabis' many uses and potential misuses (depending on who's using it, how often, and why) there's no way to "slot" cannabis cleanly in either the wellness or not-wellness column. It's more complex, and the massive literature on that consideration can't be summarized here. We're reporting on (not pronouncing on the rightness of) the global needle tipping towards decriminalization, and forecasting that the opening up of new markets will naturally create new intersections with spa/wellness.

THE CANNABIS-WELLNESS TREND

For all the ink spilt on the cannabis "lifestyle" makeover, there has only been piecemeal coverage of the ways that cannabis is becoming integrated with spa, yoga and beauty and wellness products. When you imagine "marijuana and spa," things like "hot stoned massage," followed by an "exfoliating Doritos scrub" rush to mind (talk of marijuana seems to spawn nervous jokes). But while new models are making the former possible, the fact is that the cannabis and spa/wellness connection is taking diverse, more serious forms.

Am I High, or Is This a Spa?

It's striking how intensely cannabis businesses yoke themselves to the familiar language of "health and wellness." Scanning thousands of dispensaries, you're hit with names like "Mindful" (a Colorado dispensary network), "Wellness Caregivers" (Los Angeles) and "Pure Wellness" (Ohio). Mission statements typically align with Harborside Health Center's (Oakland & San Jose, California): a "dedication to changing the perception of cannabis to one of wellness and healing." And if one rising cannabis store design trend is "Apple Store," the more prominent look is "spa": warm, aspirational, wellness-clinical, with smartly dressed women "budtenders." Many dispensaries, like Capital City Care (Wash. DC), report that their look has been very consciously designed to be "cross between a spa and doctor's office."

Dispensaries & Clubs Add Massage, Yoga, Fitness

A trend to watch is more North American dispensaries and European cannabis clubs adding free massages, yoga/Pilates/meditation classes, alternative medicine specialists – and even (cannabis) juice bars – to morph into a new kind of "Bliss Spa." At Canna Clinic Medicinal Society there are free cannabis oil massages, while Sea to Sky Alternative Healing Clinic (both Vancouver, Canada) has an in-house naturopath and "medicinal" smoothie bar. At Sparc (San Francisco) you'll find free acupuncture, meditation, acupressure, Ayurveda and live jazz. More European cannabis clubs, like Barcelona's AIRAM and LA MARIA, offer members massage, medical consultations and yoga



If one rising cannabis retail design trend is “Apple Store,” the more prominent look is “spa”: warm, aspirational and wellness. At **Sparc** (San Francisco) you’ll find free acupuncture, meditation, acupressure, Ayurveda and live jazz.

and Pilates classes. Consider Harborside Health Center’s wellness menu: their 100,000 customers (!) have access to free qi gong, tai chi, yoga, reiki, meditation and TCM, along with chiropractors, naturopaths, hypnotherapists and western herbalists. Are these “spas”? If not, are they competitors to spas (with an advantage of being cost-free)? Adopting the look and menus of spa/boutique fitness is one smart move, reassuring patrons that these are places of safety, community and healing.

Med Spas Prescribe

Another trend is traditional medical spas having clinic doctors recommend or prescribe for medical marijuana – like Restorations Wellness Center & Spa (Denver) and MD Medical Spa & Wellness Center (Boston and Cape Cod, Massachusetts) – after which topical cannabis products can be used in spa services.

Cannabis + Spa Tourism

For 40 years Amsterdam, with its hundreds of “coffee shops,” has been Cannabis Tourism Central (although it’s technically not even legal there, just tolerated). And the Internet lights up with global guides on the best worldwide destinations to “smoke weed,” like Morocco’s Rif Mountains or Spain’s burgeoning cannabis clubs (technically for resident “members” but in reality giving Amsterdam a run for the cannabis tourism crown).

But with marijuana legal in four naturally beautiful U.S. states – Colorado and Washington (2012), Oregon and Alaska (2014), and Washington, D.C.

poised to legalize, the recreational usage, a new model was born: fully legal cannabis tourism open to “medical tourists” (without access at home) as well as those seeking what is for them a special kind of experiential “wellness trip.” If you think it’s all buses filled with frat boys, think again: very high-end tours are emerging, creating luxe experiences on the “wine country” model. For instance, Colorado tour operator SPIRO offers a “Rest and Relaxation” package with luxury transport to Denver, 4-star hotel stays, trips to farms, cooking classes, art museum outings, and massages (with THC-infused oils) at fine day spas. Or consider So Mile High’s \$38,000/couple Colorado tour, with private jet, the option of Ritz-Carlton accommodations, very fine dining, and a whole day at Antoine Du Chez, one of Denver’s toniest spas.

There are new guides identifying the growing number of hotels that allow guests to partake in rooms/ dedicated spaces, and an attractive property like Adagio Bed & Breakfast recently re-branded itself as “Bud and Breakfast.” What’s the impact of recreational legalization on tourism numbers? It hasn’t yet been formally quantified in those U.S. states, but it seems significant, if hardly a case of people jumping on red-eyes for “Reefer Madness.” Colorado had a record tourism year in 2013, and a 2014 study found that out-of-state visitors account for 44 percent of marijuana sales in larger cities and up to 90 percent in mountain resorts. Interestingly, Colorado tourism officials report that most cannabis tourism is of the “secondary” variety: not the main purpose of the trip, but something people choose to experience while there⁷. But with more U.S. states poised to legalize, the *London Guardian* recently pronounced, “It must only

be a matter of time before you can book a marijuana tour of the entire U.S. – yoga and chocolate brownies included.”

Denver-based travelTHC, a website that connects tourists to private, “marijuana-friendly” vacation rentals in Colorado, will officially launch in January 2015. The company helps visitors to Colorado take advantage of the state’s new marijuana legislation, which makes the purchase of marijuana legal but prohibits smoking of cannabis in public places. (Most hotels also do not allow smoking of any kind, which leaves tourists who would like to smoke in a quandary.)

TravelTHC co-founder Jordan Conner, says the company plans to expand its short-term rental offerings as marijuana is legalized in other states and countries. “Our goal is to be the online destination for people who would like to smoke cannabis safely and legally in the comfort of a private home.”

Above: Adagio Bed & Breakfast, located in a Victorian home minutes from downtown Denver and the convention center, re-branded itself as **Bud & Breakfast** at the Adagio. It was the first cannabis-friendly lodge in the state.

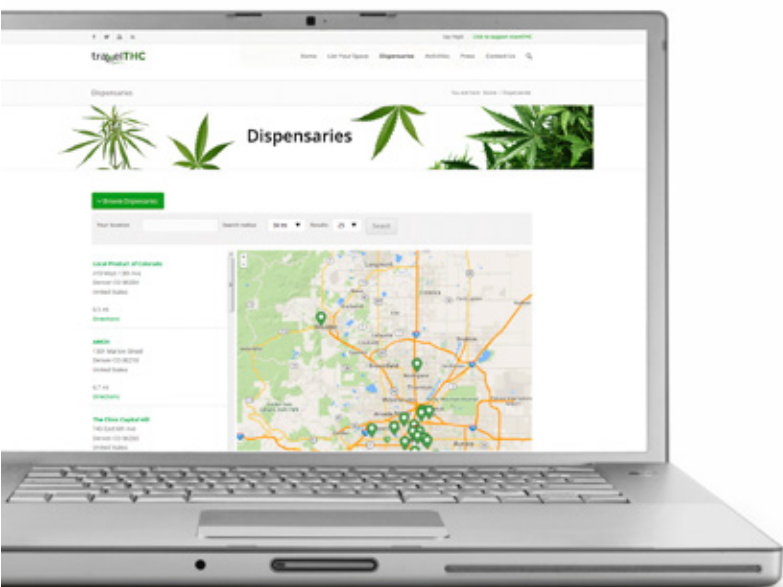
Below: A map at **travelTHC**, the new website that connects tourists to private, “marijuana-friendly” vacation rentals in Colorado, conveniently shows where marijuana can be purchased.



Profusion of Topical Products

As applications for the many non-high-inducing cannabinoids get developed, a wave of cannabidiol (CBD-infused) lotions, massage oils, salves, salts, soaps, and beauty/skincare products are appearing. While there’s the double bind that not much research has been done (because topical CBD/low-THC products are, oddly still classified as illegal beyond the medical dispensary), there are indications that these new topicals have pain-reducing and anti-inflammatory benefits. And because they’re packed with essential fatty acids and anti-oxidants they’re a hot new super-oil for dry skin, acne, eczema and psoriasis.

There are two “hemp” topical classifications: lotions and potions that use hemp seed oil and are available to all, like hemp skincare pioneer Body Shop products, or newer players like Hempz or Cannabis Beauty Defined. CBD-infused products, with their small amount of THC, are only available where medical marijuana is legally dispensed or in new recreational markets. A few major players: Apothecanna (founded by a product designer for natural companies like Aveda), with it’s pain relieving, calming, and stimulating body cream line; or Mary Jane’s Medicinals, with its oils, lotions, soaps and bath balls; or Doc Green’s healing creams. These companies’ sites are full of glowing reviews on these products’ power as pain relievers and skin beautifiers, and it seems only logical that looser regulations for topical products must be on the horizon.





Primal Wellness

The Cannabis Spa

We've examined the spa-cannabis connection in tourism, and in dispensaries that have added massage and wellness services, but the biggest "cannabis connection" for regular spas is using the new, won't-get-you-stoned topicals in bodywork and facials. It's still complex, because clients either need to bring in their own legally purchased products, or spas in legal markets need to partner with companies like Apothecanna to deliver new cannabis treatments. For instance, LoDo Massage and Yoga (Denver) says they've tripled their business since they launched the pain-relieving "Mile High Massage" with Apothecanna's lotions. Cannabis spa treatments are also happening in Europe: German spa guide Wellness Heaven recently tested diverse treatments like the Cannabis Sativa oil massage at Therme Laa Hotel & Spa in Austria. There's a reason that companies like HempMeds (which sells \$1 million in CBD-infused products a month) has sponsored the International Spa Association (ISPA) convention: these companies see spas as a key, future market.

Above: **Primal Wellness** (Denver) opened "the world's first cannabis day spa," where the focus is cannabis bodywork and facials. And one of the first contestants on "The Marijuana Show" presented a "Green Spa" concept, a cannabis-focused property with massage, hot tubs and private camping – geared to Asian tourists.

New models are coming. Primal Wellness (Denver) just opened "the world's first cannabis day spa," where the whole focus is cannabis bodywork and facials. And it's telling that one of the first contestant-entrepreneurs on "The Marijuana Show" presented a "Green Spa" concept, a cannabis-focused property with massage, hot tubs and private camping – geared to Asian tourists.

Below: **Dixie Elixirs** produces branded topical products that would not look out of place on the shelves of Whole Foods.



Dixie Elixirs



Ganja Yoga

Anyone that's taken yoga classes may have thought at some point, are some of these people stoned? But whatever has been unofficially going on (counterculture '60s celebs like the Beatles and Allen Ginsberg publicized their yoga + cannabis experiments), it's now coming out into the open. More instructors are accepting of the pairing, and more branded classes are appearing, dubbed "enhanced yoga," "420 Remedy Yoga," or "Ganja Yoga." Proponents will cite that ancient Indian Vedic texts mention that cannabis enhances yoga, quieting the outside world.

Examples of trending cannabis yoga classes: pioneer, Dee Dussault, runs Ganja Yoga classes in San Francisco, where students can "enhance" during class if they bring their medical card, and where 15 minutes are spent imbibing, followed by 90 minutes of relaxing hatha practice. At Atwater Yoga (Los Angeles) there are regular "420 Remedy" classes, and you can partake in ganga yoga at the House of Yoga (Toronto). European Cannabis clubs, like Cannabis Club London, are offering the combo, and Cannabrand rolled out a Vape and Vinyasa class in Colorado. It's beyond yoga: the new 420 Fight Club held in NYC's Washington Square Park combines martial arts training with consuming. Purists argue that true yogis should keep a clean mind, while proponents will counter that cannabis helps people focus on their breath and meditation. It's for people to decide, but they will certainly have more places to experiment in legal/tolerant markets.

Dee Dussault, runs **Ganja Yoga** classes in San Francisco, where students can "enhance" during class if they bring their medical card.

Cannabis Edibles: Am I Stoned, or Is This a Trendy Food Shop?

A mind-blowing cannabis edibles market is taking off, and the haute cuisine delicacies are as much the star as the "high" cooked within – a built-in solution for the "munchies." The Sterling Rice Group named edible marijuana products one of the top ten 2015 food trends, with THC-infused cannabis getting rolled into every imaginable trendy food/beverage, as newly legal markets meet the Foodie Revolution. The Colorado Chamber of Commerce claims that edibles make up 45 percent of the legal cannabis market, and the lowly home-baked pot brownie is getting replaced by Parisian macaroons, ice cream and cold-brewed coffee. Colorado's Sweet Grass Kitchen churned out mini pumpkin pies and spice teas for Thanksgiving; Dixie Brands wants to create a marijuana soda revolution (served up in suave brushed-aluminum bottles); and Denver's Love's Oven is concocting croissants, maple bacon bars and olive oil, with the *LA Times* reporting the owner wants to become the "Escoffier of marijuana" (referencing the famed French chef).



Jane West, Edible Events Co.



Previous page and Left: **Edible Events** produces private events and fund-raisers showcasing "Colorado's culinary, cannabis and art scene."

A Superfood

We've had a parade of "it" seeds (flax, chia, etc.) and "it" milks (almond, kefir, etc.), but hempseed and hemp milk are the new buzzed-about superfoods, with very public fans like Dr. Oz (hemp milk is his favorite alt-milk) and Dr. Andrew Weil arguing that they're some of the most uniquely nutritious foods on earth. Both the seed and the sweet, nutty milk are a complete protein, packed with all ten essential amino acids, fiber, Vitamin E, iron, magnesium and zinc, with no known allergens. People are tossing seeds in salads, blending hemp powder in smoothies, even juicing hemp now. And there are more hemp milk brands, from Living Harvest to Hemp Bliss, on the shelves.

THE FUTURE

Perceptions of cannabis – applications for the "whole-plant" and a global wave towards more medical and recreational legalization – are just at a tipping-point. Legalization creates boom markets overnight, and in the U.S. a "wild west" of start-ups (like the Internet's early days) is rushing to create new business models, including tourism, therapeutic products, foods – and, yes, new spa, yoga and wellness "connections." The world will closely watch the North American and Uruguayan experiments in

2015 – what works, what doesn't. But this is not just a "2015" trend, it's one with a long, gradual future. If more U.S. states legalize use as expected, will the government legalize at the federal level? And when viable national and international markets become a reality, will big Pharma and mega-corporations step in and take over? According to recent articles in *Scientific American*⁸ (and *Newsweek*⁹) there's new research/interest in how psychoactives like cannabis, and more intense psychedelics like "magic mushrooms," peyote and LSD, "could revolutionize healthcare."

For now, wellness "purists" (whether businesses or consumers) will likely embrace the new therapeutic topicals and hemp as superfood, while they shy away from the psychoactive, "rest and relaxation" uses of cannabis in a spa, yoga or travel setting. Others will welcome all of these developments. Cultures of purity and open-mindedness will sharpen, and for the latter, there will be more new intersections between cannabis – and spa, wellness and yoga – in more places, in years to come.

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- 1 *Time* magazine, "Bob Marley Marijuana is Coming," November 18, 2014.
 - 2 MSNBC, "Estimate for marijuana and related products, both legal and illegal, from private equity firm, Privateer Holdings," November 2014.
 - 3 National Academy of Sciences data: 15 percent of those who experiment with alcohol become dependent – for cannabis the estimate is 9 percent.
 - 4 *International Journal of Cancer*, "Cannabis smoking and lung cancer risk: Pooled analysis in the International Lung Cancer Consortium," 15 February, 2015.
 - 5 United Nations Office on Drugs & Crime data, 2014.
 - 6 *The Independent* (UK), "As Cannabis Is Widely Legalized, China Cashes in on Unprecedented Boom," January 2014.
 - 7 NBC News, "We're Not Amsterdam," April 2014.
 - 8 *Scientific American*, "How Psychedelic Medicine Could Change American Medicine," August 28, 2014.
 - 9 *Newsweek*, "Ecstasy and Medicine in Your Medicine Cabinet," October 4, 2014.

3

Wellness Traditions from the Islamic World

BEYOND HAMMAMS AND ARGAN OIL

"Absence of understanding does not mean
absence of existence"

- **AVICENNA,**
Persian philosopher and "Father of
Modern Medicine" (980-1037 AD)



Wellness Traditions from the Islamic World

Beyond Hammams and Argan Oil



Desert Island

THE TREND HIGHLIGHTS

- More Middle Eastern, African and Malaysian medicinal plants, spices, ancient grains and fruits becoming the buzzed-about “superfoods” – with ingredients like freekeh, fenugreek, teff, turmeric and harissa already topping multiple global 2015 food trends forecasts
- Ingredients used for both food/medicine AND beauty trend globally: from camel’s milk to blackseed oil to baobab fruit and oil to frankincense
- A global interest in spa treatments beyond the hammam: from rasul/mud experiences to sand bathing – and even new sand-immersive massage tables that bring Arabic “sand bathing” to any spa
- More Middle Eastern/African spas moving beyond “Asian” menus, to go deeper into indigenous ingredients, medicines, treatments and design

BACKGROUND

There is no more powerful consumer trend across the developed world than the hunger for all things authentic and indigenous, impacting what we now most want to eat (the latest global “superfoods” and ancient grains), to where we most want to travel (suddenly a far wider, exotic map). It’s why the spa/wellness scene is increasingly a global village, with approaches like Indian Ayurveda and yoga and Traditional Chinese Medicine now embraced worldwide.

Given this massive authentic-experiential trend, it’s puzzling that the world has been unable to “see” just how much the wellness traditions of the wide Islamic world offer—with 1,000+ years of sophisticated, nature-based traditional medical systems and countless beauty solutions and body treatments. And this is a vast “wellness” map that stretches from Middle Eastern countries like Saudi Arabia and the UAE to North African nations like Morocco and Egypt to Sub-Saharan countries like Nigeria and Sudan to Central Asian states like Turkey or Kazakhstan and Southeast Asian nations like Indonesia and Malaysia.

And the “Islamic world” is wider and more complex than many think. Sixty-two percent of the Muslim population resides in Asia, 20 percent in the Middle East/North Africa and 15 percent in Sub-Saharan Africa, but significant populations stretch from Surinam in South America to Western China. There are 65 countries/states with a majority or significant Muslim population, from secular republics like Indonesia to democracies like Malaysia. And wellness traditions (like all cultural traditions) thrive beyond national borders: More than one-fifth of the world’s Muslim population lives in countries where Islam is not the majority religion. India has the third-largest population worldwide, China has more Muslims than Syria, while Russia is home to more than Jordan and Libya combined.¹ But what people perceive, and ultimately understand

and experience, is of course, conditioned by the media: For instance, we’re bombarded by news of Middle East violence, and the image stream from Africa often revolves around disease. The upshot of this perhaps understandable, but unfortunate, media myopia? Most people don’t associate Africa and the Middle East with wellness, even though advanced food-as-medicine, and anti-aging and healing systems, have been refined across these regions for over a millennium.

Many people are only familiar with a handful of traditions...a few Middle Eastern super-spices...that Moroccan argan oil in their hair...a Turkish hammam. But we predict that more of the world will experience nutritional, preventative health, beauty and “spa” traditions central to Islamic worlds in 2015 and beyond – even though they might not even know it.

Paradigm Generated by Prof. Gerry Bodeker

This trend’s title and conceptual framework comes from Professor Gerry Bodeker’s (Chair, Global Initiative For Traditional Systems of Health, and Dept. of Primary Health Care Sciences, Oxford University) recent, pioneering research² into the vast array of traditional wellness practices in 20+ countries across Southeast Asia, the GCC nations and North Africa, and parts of Sub-Saharan Africa and Eastern Europe. This recently completed project, privately commissioned by the non-profit Qatar Foundation,³ involved a team of nine researchers and resulted in a 300-page privately published report documenting what had not been documented before: the diverse traditions of healthy living across Islamic worlds.

While it’s impossible to summarize Prof. Bodeker’s analysis here, which draws on extensive work with the World Health Organization and others on global trends in traditional and complementary medicine, his research concludes that that there are a deep, unifying (if informal) assumptions that underpin wellness traditions across Islamic societies.

1) Arabic medicine is a sophisticated, 1,000+ old written tradition that has had wide impact on Islamic cultures. The Persian philosopher Avicenna’s (980-1037 AD) central work, “The Canon of Medicine,” has been called the single most influential text in the history of medicine. And while summarizing Avicenna’s 14-volume medical encyclopedia is also impossible here, his still-relevant thinking on personalized healing through diet, medicinal

plants, exercise, sleep, hydration and body manipulation – and his humoral system focused on how hot/cold, wet/dry continuums and imbalances play a role in health and aging – has had a profound influence on health practices across Islamic cultures. In fact, Avicenna’s ancient system is still practiced in parts of the Middle East and Asia today.

2) Islamic wellness traditions place the highest possible value on Nature and its beneficence, and have evolved a complex understanding of how the human body specifically responds to natural ingredients. (Reverence for nature is why many Islamic flags are green.)

3) These traditions are obviously differentiated by how they apply the above knowledge/principles to the local “nature” on tap: the specific climates, plants, herbs and minerals people have interacted with across key regions.

So, while no cultural traditions are fixed in time (over centuries there is much interplay, i.e., African tribal medicine mixing with Arabic medical knowledge, etc.) – the concept of “wellness traditions from the Islamic world” represents an important new lens to “see” and newly understand a rich knowledge base on wellbeing. And it’s meant to start a new conversation...

“The nutritional, healing and beauty traditions across Islamic cultures are the last, lost, great bodies of traditional health knowledge that must and will be discovered,” said Bodeker. “We’re just at the tip of the tip of the iceberg in uncovering the wealth of health resources that exist here.”

FUELING THE TREND

Hunger for the Authentic & Indigenous

As globalization and the march of corporate brands creates a generic world, a natural reaction has been a fascination with the real, the unique, the handcrafted, the culturally exotic – and for brands/experiences with an authentic “story.” This will drive an increasingly powerful interest in wellness traditions from every corner of the world – from Bahrain to Bolivia.

Explosive Wellness Tourism Growth in Middle East & Africa

The Middle East and Africa, and countries like Malaysia or the “Stans,” are clocking some of the fastest growing inbound tourism, and with visits come appreciation (and social media broadcasting) of the food, culture and local wellness experiences. Africa saw a 90 percent increase in tourism from 2012-2013,⁴ and inbound trips to the Middle East are forecast to grow at least 10 percent in both 2014 and 2015.⁵ On the wellness tourism front, there’s no faster growing markets than the Middle East/North Africa and Sub-Saharan Africa: the former saw 39 percent growth and the latter 57 percent, from 2012-2013, both growing more than twice as fast as the next biggest gainer, Asia-Pacific.⁶ In Central Asia “the Stans” (like Uzbekistan and Kazakhstan), usually forgotten by travelers, are suddenly making top 2015 travel lists.⁷ And even Malaysia, with two tragic travel years, grew arrivals 10 percent in 2014.

New Research, Republishing of Historic Texts

More academic research on traditional health practices from Islamic societies will keep appearing, not only a clear sign of ramped-up interest in the topic, but also an important channel for spreading the information. In 2013, *“Avicenna’s Medicine: A New Translation of the 11th-Century Canon with Practical Applications for Integrative Health Care”* was published, the first, modern, English translation of this 1,000 year old text, whose theories underpin many wellness practices across Islamic societies. Not only did the book have a highly credentialed



Four Seasons Safari Lodge Serengeti offers a Baobab ritual, using the fruit Africans have trusted for centuries as a cure-all.

editorial team of scientists,⁸ it translates Avicenna’s more medieval, mystical concepts into accessible integrative medicine applications. An abridged version of Prof. Bodeker’s book on “Wellness Traditions from the Islamic World” is on the drawing board for 2016. And the Avicenna Center for Arabic Medicine @ Georgetown University, conceived and led by Algerian researcher, Dr. Hakima Amri, is in the development stage – a striking affirmation of medical relevance from a respected Catholic/Jesuit university.

Chronic Disease Epidemic in Middle East/Africa

With development comes bad “Western” habits, and across all developing nations an alarming chronic disease wave is underway. In the Middle East/North Africa, for instance, diabetes has grown 87 percent, heart disease 44 percent, and high BMI by 138 percent, in the last 20 years.⁹ The Gulf Region has spiking diabetes rates, and cardiovascular diseases cause 45 percent of early deaths. Dubai even recently offered bars of gold for citizens that lost weight. More people in these regions, must, and ultimately will, rediscover their own diet and wellness traditions, which are more culturally appropriate for most than jogging or yoga. The resurgence of these indigenous wellness traditions will also be driven from “within.”

THE TREND

Superfoods from Middle East & Africa Surging

After winnowing down key examples of nutrition across Islamic cultures in Africa, the Middle East and Asia –where food and medicine are often interchangeable – we then watched the avalanche of global 2015 food trend forecasts roll in. We were amazed. Not only did multiple forecasts¹⁰ concur that Middle Eastern, North African and Malaysian ingredients were next year's headline news, but specific ancient grains, spices and fruits identified– from freekeh and fenugreek to teff and turmeric– were splashed across trend-spotters' lists.

We live in a "foodie" meets wellness-crazed world, but the food-as-medicine traditions from Africa, the Middle East and Malaysia have been under-explored, and the fact that they're trending is welcome news. And while forecasters necessarily present "hot" ingredients, from baobab fruit to camel's milk, in piecemeal fashion, one way to conceptualize what's unfolding is a heightened interest in healthy ingredients from across the wide Islamic worlds.

The following snapshot is also necessarily piecemeal, omitting dozens of foods, herbs and spices.

The New/Old Super Grains

Teff: In the quest for the "new quinoa," the ancient, gluten-free grain teff, long produced from Yemen to East Africa (and now only majorly grown in Ethiopia, where it provides 2/3rds of the nutritional diet), stars on numerous 2015 top food trend lists.¹¹ Leading all grains in calcium, and high in protein, iron, amino acids and fiber, teff is a tiny, sweet, nutty grain moving into sweet and savory dishes of all kinds – from cereals to salads.

Freekeh: This fantastically named, quinoa-contesting, Middle Eastern super-grain is made from green wheat, roasted to give it a smoky flavor, and is also featured on many food trends slideshows, with fans like Oprah and celeb chef, Jamie Oliver. Packed with protein and fiber, more trendy kitchens are using it as a rice or couscous substitute.



Fenugreek is used in Oman by women as a restorative after childbirth. Research indicates that it increases milk production and helps re-balance postpartum hormones.

Medicinal Plants & Spices

Turmeric: Ever since health experts revealed this spice rack staple to be a powerful anti-inflammatory and antioxidant, it's been a trending culinary ingredient globally. And it's still making its way onto 2015 trends lists ("bitter" flavors are hot). In Indonesia turmeric has been the cornerstone of the herbal medicine system known as Jamu for 4,000 years, taken daily by tens of millions for myriad health/beauty benefits. What few in the West know is just how big Jamu is becoming as a commercialized, packaged drink in SE Asia (a few products like Sajen Jamu have hit Whole Foods) – and this is a trend that should pick up globally. Spas are taking note of "turmeric power," for instance at the Four Seasons Toronto (as part of the brand's new energy-focused treatments) cold-pressed juices including turmeric are delivered to guest rooms daily.

Fenugreek: This ancient, rich in vitamins and minerals, sweet herb/spice/leaf is becoming a trending seasoning. Used in Oman by women as a restorative after childbirth, research indicates that it increases milk production and helps rebalance postpartum hormones.¹²

Other spices surging from the Middle East/North

Africa: Egyptian Dukkah, a blend of toasted nuts, seeds, coriander and cumin; Za-atar, a mix of sumac, thyme, sesame seeds, oregano and marjoram; and ras el hanout, or the 80-plus-ingredient "Moroccan spice," used traditionally to boost digestion and vitality.



Camel's Milk U.S. brands like **Desert Farms** are at Whole Foods

Fruits

Cran-cherry-like Goji berries have been celebrated as a superfood for years, with one of the highest antioxidant/anti-inflammatory powers of any fruit. Few people know their main source is Ningxia, an autonomous, Muslim region in NW China.

Sidra Fruit: And few people know about the deep nutrition of the Sidra tree, used as medicine in the Middle East since antiquity. Often consumed as dried fruit, it has 20 times the vitamin C as citrus, is mineral-packed (K, P, Mn, Ca, Na, Fe and Cu), and is used to boost the immune system and treat insomnia/anxiety.

Other Trending Foods: Further confirmation that Middle Eastern/North African ingredients are ascending worldwide...Baum & Whiteman's "Hottest Food & Beverage Trends for 2015" spotlights the rise of savory yogurts without the "candy-level calories" (Think beet and butternut squash, or topped with hummus, za'atar, cucumber or mint –the latter long standard in the Middle East.) Their report also notes that hummus is now out-trending salsa, and available in dozens of flavors at most supermarkets. And Datamonitor's 2015 forecast pegs North African harissa, a spread of hot chilis, roasted peppers, garlic, caraway, coriander and olive oil, as "the next sriracha" for the West.

Ingredients Used for Both Food AND Beauty

The following are ingredients traditionally used for both nutrition and beauty. And it's striking how few beauty products from the Middle East/Africa are on the world's radar. Yes, there's shea butter, and we've lived the Moroccan argan oil sensation (now we're even seeing brushes/styling irons from the brand Cricket infused with argan oil) – but there's so much more to explore.

Camel's Milk: The world has seen a parade of "it"/alt milks (soy, almond, coconut, etc.), but camel's milk is a new headline grabber. Camel milk and related products have been a Middle East staple: in Dubai there are brands like Camel-icious, and now U.S. brands like Desert Farms are at Whole Foods. The swirl of articles about new superfoods often over-hype their "mysterious powers," but coconut-ty camel milk does have unique qualities: lots of immune-boosting antibodies, and three times the Vitamin C, ten times the iron, more absorbable calcium, and less fat, than cow's milk – and great for those allergic to the latter. For now it's expensive, as camels produce one-sixth the milk of cows, but demand means production is stepping up globally (and in the U.S. camels are being raised on Amish-Mennonite farms). It's getting the trendy treatment: at Desert Islands Resort & Spa in Abu Dhabi, the centerpiece dessert is camel's milk crème brulee – in the UK, there are several camel milk

ice cream brands, with Simply Ice Cream planning to head to Harrod's soon – and at Al Nassma's Majlis Café at the Dubai Mall, camel lattes and camel-cinos are poured (one hump or two?).

And because it's antibody- and protein-rich, camel's milk is making its way into more skincare products: from Shea Terra's Moroccan and Lava Camel's Milk Masque, to the new U.S. camel's milk skincare line, Skinue, which is distributing to spas.

Black Seed Oil: Made from the seeds of the *nigella sativa* plant, it's referred to by the prophet Mohammed "as the cure for all except death." Super-high in antioxidants and essential fatty acids, it's traditionally been both eaten and used topically to beautify hair and skin. And interesting medical research lies behind it:¹³ studies indicate it's an immune stimulant and antihypertensive (with benefits for diabetes, asthma, arthritis, etc.) – and that its unique chemicals thymoquinone and dithymoquinone exhibit anti-cancer activity on numerous cancer types.

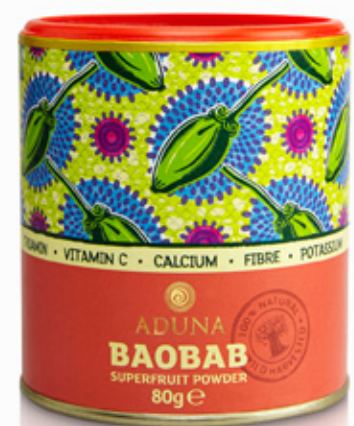
A star example of this super-oil's expression in a new beauty product: the Tiossan skincare line (the first luxury beauty brand from Senegal), created by entrepreneur Magatte Wade (and one of Forbes "20 Youngest Power Women of Africa," who based her black seed oil-centered formulations on the recipes from the village traditional healer her own grandmother nourished her skin with daily. Tiossan has launched successfully online and at Birchbox, and is now fast moving into U.S. Nordstrom department stores, with the brand to add subgels, so it can deliver blackseed oil health both within and without. Wade has many powerful visions for the Tiossan brand: for one, she's planning to build a model mini-village in Senegal where all production will take place, and where workers will live in a community with advanced schools and sustainable, indigenous Senegalese architecture.

Baobab Fruit & Oil: The Baobab tree, one of the weirdest-looking trees on Earth, bears fruit that trend-spotters like the Specialty Food Association say will explode on the scene in 2015. It grows in Africa and the Arabian Peninsula, and the mango-sized fruit

(which reportedly tastes like grapefruit/pear/vanilla) opens to a powdery, nutrient-packed center. Baobab earns the name "super-fruit": Africans have used it for centuries as a cure-all, and it has six times the Vitamin C of oranges, six times the potassium of bananas, twice the calcium of milk, exceptional fiber, and tons of B vitamins, iron, magnesium and anti-oxidants. The big industry is exporting dried baobab powder that can go into just about anything. Aduna, a business that advocates for small-scale baobab producers, and whose baobab powder is available at Holland & Barrett health stores, has launched a "Make Baobab Famous" campaign – and it's working. Both Waitrose and Marks & Spencer in the UK are launching baobab juices.

And because baobab's dense antioxidants, Vitamin C and polyphenols are skin wonders, it's moving into beauty products and spa treatments. London's sleek K West Hotel & Spa recently launched a "Baobab Feel Good" treatment using Germaine de Capuccini baobab-based scrubs and oils – all followed by a Baobab smoothie (a portion of sales go to the Aduna Foundation). At London's new super-social Aqua Bathhouse & Spa at the Mondrian, the resident pharmacognosist (a doctor specializing in medicinal herbs) matches baobab teas to treatments. The new Mbuyu Experience at Four Seasons Safari Lodge Serengeti is a full baobab ritual: you drink a baobab infusion, have a baobab oil massage, and leave with a baobab tasting sampler and recipe book. Just a couple of baobab-centric beauty lines: Allafia skin cream and Beauty Biologie hair products and body scrubs.

The Baobab super-fruit has six times the Vitamin C of oranges, six times the potassium of bananas and twice the calcium of milk.



Aduna Baobab



Frankincense, is an aromatic resin used in incense and perfumes, obtained from trees of the genus *Boswellia* in the family Burseraceae,

Frankincense: When many western people think “frankincense,” they think Christmas, but this resin from the *boswellia sacra* tree was used as ingestible/topical medicine on the Arabian Peninsula 3,000 years before those three Magi. Rich in anti-inflammatory boswellic acids and monoterpenes (great for aging skin) it’s headed into more skincare products, like Neal’s Yard’s central product, “Frankincense Intense,” (mixed with baobab, turmeric and argan oil). And frankincense is central to more aromatherapy lines, like the UK’s Aromatherapy Associates, so it’s wafting through many spas. Even the flavor is trending: cocktails with frankincense recently started pouring at the swanky Artesian Bar at London’s Langham Hotel.

Breaking the African Beauty Barrier: Although more than 25 percent of the planet’s botanical species originate in Africa, less than one percent ends up on beauty retailers’ shelves.¹⁴ But that’s thankfully poised to change with the appearance of more African-based beauty brands, like Tiossan or Healing Earth (which also incorporates indigenous African botanicals).

Magatte Wade of Tiossan notes, “A woman recently said to me, ‘It never occurred to me to equate Africa with beauty products or rituals’ – but people just don’t understand the sheer, incredible diversity and efficacy of beauty and body healing traditions across the dozens of African countries. Nor do they grasp how intensive the wellbeing concept can be for us:

western women focus everything on the face, but in Senegal we have a ‘whole body’ approach, where hours can be spent on healthy, self-care rituals. The world’s skin is at the most fundamental level the same: yes, we have dry, oily, young and aging skin worldwide, but it is universally the role of skin to take in nutrients and expel toxins. The world needs to open its mind to the power of African beauty solutions, and it will be great ingredients and brands that will ultimately break those global barriers.”

“Spa” Experiences

Any attempt to describe the many body treatments across Islamic cultures is impossible here. In Indonesia every region has unique forms of massage and oils – in Morocco massages are tailored for specific ailments. How little we know about post-childbirth ventral massage in Indonesia, involving special fabrics and turmeric, or traditional laurel leaf and grape seed massage in Uzbekistan to support men’s vitality or Sudanese scented smoke baths ritually performed by women.

A few of the treatments with global traction:

Hammamania Forever: The hammam experience (traditional to Eastern Europe, the Middle East and North Africa) may be the one Arabic spa tradition that the world knows. Spafinder Wellness named it a top trend back in 2010, but the number of new resorts featuring this deep-cleansing ritual of heat, scrubbing and soaping has only gained steam – with roughly a quarter of the top, new global spas featured in Condé Nast Traveler and Tatler these last couple of years launching with a hammam. They have gone from novelty to near ubiquity: the just-reopened Condado Vanderbilt Hotel features “Puerto Rico’s first hammam,” and when the Ritz-Carlton Langkawi (Malaysia) opens this year it will unveil a Turkish variety.

Rasul Rooms & Mud Rising: Some Moroccan hammam experiences involve application of local rasul mud and clay. But now we’re seeing more standalone, Arabic-inspired rasul mud-rooms appear. The experience: a shower, then a slathering of mineral-rich, exfoliating muds in different colors and textures (applied to different body parts based

on sensitivities), then an herbal steam and shower. Rasul experiences are popping up everywhere: from Ramside Hall Hotel (UK) coming this spring, or at the award-winning Salamander Resort & Spa in Virginia (U.S.) horse country. And at what must be Africa's coolest, most conservation-focused, culturally-immersive wilderness lodge, Segera Retreat (Kenya), the spa uses local soil and spice scrubs, traditional medicinal plants, and centerpiece experiences like a rock bath with camel's milk and a fabulous rasul steam tower. Traditional rasul treatments have certainly influenced another trend in hip Western spas: outdoor, public "mud bar" playpens or "lounges" (like at the Standard, Miami or the just-expanded Bacara Resort & Spa, Santa Barbara) - where the young and beautiful roll around wearing nothing but mud.

Sand Baths: "Psammotherapy" means the therapeutic application of sand, and the first written description of the benefits of a hot sand burial/bathing was recorded in Siwa in ancient Egypt. The ancient medical pantheon, Herodotus, Galen and Avicenna, all wrote about sand bathing's healing properties. Traditionally, holes were dug in the morning, and people were buried (head free) for 20-30 minutes during the hottest part of the day. Because sand has high heat capacity and low thermal conductivity it uniquely warms the body gradually and uniformly, to help with musculoskeletal and arthritic pain/inflammation. And it also results in a lot of instantly absorbed sweat (so no overheating, and temporary weight loss). If Eskimos have an elaborate vocabulary for snow, desert people have the same for sand, and throughout the Middle East/North Africa people for centuries have traveled to experience the most therapeutic sand (like to Aswan, where you can experience it now at the Pyramisa Isis Island Resort).

Sand bathing has experienced crazy global migrations. It's big in volcanic-sand-rich Japan (called suna-buro) at many onsens. It became a trend in places like Paris, Chicago and San Francisco around 1900. It was popular in Soviet Russia in regions like Crimea. Today sand bathing is happening everywhere from Madeira to Uzbekistan to Korea, and in spas in the Middle East, Europe and Asia. Forward-thinking Brenner's Park (Baden-Baden, Germany) has had



Sand bath at **Pyramisa Isis Island Resort**.

a hot sand therapy cabin for 20 years. And it's on the rise in places like Merzouga in Morocco, where local Berbers have a brisk trade burying tourists. Luxe versions can be found in spas like Qasr Al Sarab Desert Resort by Anantara in Abu Dhabi. And the Saudi government's massive tourism/entertainment city, Al Uqair, set to open in 2017, will feature an entire "arenotherapy" (sand bathing) center. In it's supreme, authentic simplicity, it seems that more beach/desert spas should and will follow suit.

Sand Massage Tables: New sand massage tables are bringing the deep, penetrating heat of Arabic sand baths to any spa. Pioneer Gharieni has rolled out their MLX Quartz sand table: spa-goers are immersed in a heated bed of warm sand and quartz, with technology that allows the shifting sand to gently massage from below while therapists massage above. These innovative sand tables are going into many top spas, from Spa Nalai at the buzzed-about, new Grand Hyatt in Manhattan (InStyle magazine just gave this "sandy" experience a warm thumbs up.), to the just-renovated Four Seasons Hotel Riyadh in Saudi Arabia. And Trautwein also just launched their Vulkanosand table, also channeling the sand baths of Egypt. Sammy Gharieni, Gharieni's founder and CEO, notes that, "Sand tables are so popular, that in 5-10 years they look to become standard at spas."



The “Gritty” Spa: So, while spas aren’t typically “gritty places,” top, trending treatments revolve around sand, mud, clay, and intense full-body scrubs (the “scrub” has established itself as the spa world’s “third treatment”) – and Arabic traditions are the big influence.

Spa Resorts Inching Towards the More Indigenously Authentic: There are no faster growing spa markets worldwide than Sub-Saharan Africa and the Middle East-North Africa (the former, admittedly, from a small base): Sub-Saharan Africa nearly quadrupled spa locations from 2007-2013 (to 1,544) – while the MENA region more than tripled them (to 3,889).¹⁵ Across MENA, Morocco, the UAE and Saudi Arabia are clocking the biggest market growth – with Morocco accounting for nearly half the spa locations in the region. If, in 2007, only 14 countries in Sub-Saharan Africa had spas, now 42 do, with Nigeria and Senegal big growth leaders. There spa is oft-paired with safari/adventure, and there are an estimated 9,000 safari lodges in Africa today, up from 400 in 1995.¹⁶

If these are the spa markets to watch, it’s striking how many spas across the Middle East/Africa revolve around non-indigenous Thai, Balinese, Ayurvedic or Western treatments/products. But change is underway: hundreds of spas are at least nodding towards local ingredients, brands and experiences.

The **Gharieni Spa Nalai Quartz Sand Bed** brings the penetrating heat of Arabic sand baths to any spa.

Local cultural/wellness immersion is happening at Six Senses Spa at Sharq Village (Doha, Qatar), gorgeously modeled after a traditional Qatari village, with a spa menu focused on Qatari ingredients/techniques. Or at the new, breathtaking Alila Jabal Akhdar resort (Jabal Al Akhdar, Oman), built by local masons from local stone, with the décor, art collection and library all-things-Omani, and a spa menu rich in local ingredients like frankincense and juniper. (Oman is the Middle East’s next wellness resort hotspot: Anantara has three more in development, Radisson Blu and Kempinski are coming, and W, Four Seasons, Fairmont and Aman have plans for this beautiful nation.)

Game-Changing Concept: A destination wellness resort planned for 2017 in Doha, Qatar represents a ground breaking concept: Zual Destination Spa would be the world’s first destination to immerse guests in the medical/wellbeing traditions from across the Islamic world (combined with modern healthy living practices). This 365-degree program based on traditional Islamic healing would go deep into the medicine, food and nutrition, beauty, massage, aroma, water, movement, purification, balance and



energy practices from across 20+ Islamic nations. And the project has strong partners and research behind it: led by the Qatar Foundation and their subsidiary Msheireb Properties (the sustainable developer currently transforming downtown Doha), and initially developed with GOCO Hospitality, a global wellness consulting and management leader, the founding concept was built on Prof. Bodeker and his Oxford University team's extensive research, with other research partners including Harvard and Stanford Universities. A landmark destination like this could define what could be done with these wellness traditions in a retreat setting, would likely further jumpstart the trend, while positioning Qatar as a pioneer in wellness.

Above: Guests at **Segera Retreat** in Kenya enjoy soil and spice scrubs, camel's milk baths and this traditional rasul (mud) steam tower.

THE FUTURE

Wellness practices of the wide Islamic world do represent one of the "last, lost, great bodies of traditional health knowledge," and we predict that slowly, but surely, they will be discovered by the world – and travelers will increasingly head to the Middle East, Africa, Central Asia and SE Asia, hungry for authentic everything.

And Ingo Schweder, founder and CEO of GOCO Hospitality, that has numerous local-treatment-and-ingredient-focused wellness projects under development from Bali and Costa Rica, to Istanbul and Dubai, explains why indigenous practices will ultimately be re-embraced "from within."

"In developing countries, from the Middle East to Africa, with newfound economic power comes an understandable, initial desire to break with the past and consume everything "western," from food, to clothes, to design – which is why there are so many spas in big, generic glass towers with menus of Thai and Swedish massage," said Schweder. "And with wellness traditions, it typically takes excitement from

the rest of the world (for instance, the Germans/Swiss made Ayurveda popular), before it starts getting re-developed back home. It's a boomerang effect, and it's why I believe that so many traditions from the Islamic world – whether their beautiful, brilliantly functional architecture (which ingeniously manages heat, air and water flow) - to their food-as-medicine philosophies – will ultimately be re-embraced back home."

This trend report could only offer an extremely limited sampler of some key foods and beauty ingredients (and new products incorporating them) - and body therapies - central to Islamic worlds. We didn't even explore fitness, and how little the world knows about approaches like Turkish Riyazat, which can be likened to yoga (a series of postures/movements) on horseback – or the Indonesian/Malaysian martial arts/movement tradition, Silat.

This is just the beginning of a conversation on a new, conceptual category of wellness. And if one turns off the TV and all its bad news, and "re-sees" these cultures through the lens of their indigenous wellness traditions – so much good news opens up.

The future? Experts on traditional health from these regions need to keep documenting their knowledge base on wellness and sharing it with the world. More scientific research needs to illuminate the human health impact of these indigenous ingredients and practices. There is just so much more to do – and explore.

- 1 Pew Research, "Mapping the Global Muslim Population," 2009
- 2 A snapshot of Bodeker's research on "Wellness Traditions of the Islamic World" was presented at the 2014 Global Spa & Wellness Summit. Without his insight this trend report would not be possible.
- 3 The Qatar Foundation is a non-profit organization dedicated to furthering the human, social and economic development of the nation.
- 4 CNN, "Stressed out? Find sanctuary in sub-Saharan Africa," 11/2013
- 5 WTM, "Global Trends Report," 2014
- 6 Global Wellness Institute, "Global Spa & Wellness Economy Barometer," 2014
- 7 *The Daily Beast*, 12/2014
- 8 Marc Micozzi, MD, former physician for the National Institutes of Health; professor, Georgetown University School of Medicine; and founding director of the Policy Institute for Integrative Medicine; Hakima Amri, PhD, professor of biochemistry and co-director CAM graduate program, Georgetown University; Mones Abu-Asab, Ph.D., senior scientist at the National Institutes of Health
- 9 World Bank and the Institute for Health Metrics and Evaluation (IHME), 2013
- 10 For instance, the Institute of Food Technologists' 2015 forecast named Middle Eastern/North African food/flavors one of their top 5 trends; the Daily Mail UK's, "Food Trends of 2015 Revealed" featured Malaysian street food/ingredients; and the Telegraph UK's "2015: Top Trends to Watch," spotlighted how "Persian food will go mainstream."
- 11 Just one example: Everyday Health, "Top 10 Healthy Food Trends for 2015," 12/2014
- 12 Sreeja et al. 2010, Westfall 2003, Bingel and Farnsworth 1991.
- 13 See Memorial Sloan Kettering Clinical summary at: <http://www.mskcc.org/cancer-care/herb/nigella-sativa>
- 14 Cited at Aduna website, 2014
- 15 Global Wellness Institute, "Global Spa & Wellness Economy Monitor," 2013
- 16 Former chairman of the African Tourism & Travel Assn., cited at CNN, "Stressed out? Find sanctuary in sub-Saharan Africa," 11/2014



4

Industrial Revolution: Blue Collar Wellness

"Feeling healthy and feeling good about yourself is not a luxury – it's an absolute necessity"

- **ELEANOR ROOSEVELT,**
First Lady of the United States



Industrial Revolution: Blue Collar Wellness



Pritikin Longevity Center & Spa

THE TREND HIGHLIGHTS

- Look for more research on the benefits of wellness and fitness modalities for blue-collar workers. There is a large body of research on alternative and wellness therapies but few studies are specifically conducted against a workforce category.
- More companies in industrial, transportation, service and manufacturing sectors will provide wellness activities. This will be a gradual increase.
- There will be more programs, often led by governments, to educate workers on the benefits of wellness modalities.
- Insurance companies and employers will offer more incentives for participation in healthy activities. And they will give employees more choice in fitness options.
- While not categorized as "blue collar," police officers and firemen are prime candidates for wellness programs and likely to be affected by the blue-collar wellness wave.

BACKGROUND

Conduct an online search for the words corporate, employee or workplace wellness, and you'll be rewarded with millions of results. Due to skyrocketing global health care costs, aging populations and record levels of preventable disease, programs promising cost-savings, less absenteeism and a more productive workforce are big business.

According to a survey conducted by the Kaiser Family Foundation and Health Research & Educational Trust,¹ 98 percent of large employers with 200+ workers and 73 percent of smaller firms offer at least one wellness program. Seventy four percent of employers offering health benefits have programs that include weight loss, gym membership discounts or on-site exercise facilities, biometric screening, smoking cessation, personal health coaching, classes in nutrition or healthy living, etc. And 36 percent of large firms offering both health benefits and a wellness program offer a financial incentive or reward to participate, such as premium contributions,

smaller deductibles, gift cards or cash. (Just 18 percent of smaller firms offer incentives.)

But despite these impressive numbers, most wellness programs focus on a few activities – measurement and screenings, and occasional lecture and gym discounts. And there is a significant disconnect between white collar employees, who often have more opportunity to take advantage of wellness offerings, and workers who do not– typically blue-collar workers around the world who engage in back-breaking work on assembly lines and in construction or transportation. The media pays a great deal of attention to trend-setting, high-profile companies like Microsoft, Apple and Google that offer employees a myriad of wellness offerings–think cafeterias stocked with organic food, salad bars with ingredients color-coded for nutritional value,² indoor climbing walls and mediation classes. But these companies are the exception. What about the seamstress in Bangladesh working 18-hour days? The express deliveryman in Toledo lifting countless packages in freezing weather? The baggage worker at Toronto Pearson International Airport loading, and then unloading, bag after bag after bag...

The lack of wellness offerings or subsidized health insurance for contract and part-time workers, who often have blue-collar jobs, increases the problem. It can be challenging to reach those who work outside of traditional office settings and requires creativity to successfully deliver programs to workers in manufacturing plants or warehouses, truck drivers, laborers, etc., Plus many people need guidance on health basics like staying hydrated, taking breaks from a fixed position or using the correct physical form when lifting heavy objects.

There are companies that demonstrate what is possible. Los Angeles-based American Apparel, North America's largest sewing facility, has received favorable attention for its commitment to a "sweatshop-free" worksite and sustainable and ethical manufacturing. The sometimes controversial manufacturing company, which was founded in 1989, provides all employees and their families with subsidized, affordable health care insurance, an onsite medical clinic, subsidized healthy food and fitness options and –to the delight of the press–



There is a disconnect between the innovative wellness programs offered to employees at trendsetting companies like **Microsoft** and those available to most blue-collar workers.

Previous page: **Pritikin Longevity Center & Spa's** corporate-wellness program includes executive physicals and consultations with board-certified physicians.

free therapeutic massage.³ Good PR? Yes, but these offerings illustrate the chasm between what a garment worker at American Apparel experiences compared to one in a developing country like Sri Lanka—or even at many factories in the U.S.

Fortunately, there are a growing number of companies that give blue-collar workers access to healthy activities. For example, Bama Cos. Inc., a producer of bakery products for the food service industry based in Tulsa, OK, offers a wellness program that includes three fitness centers and more than 40 fitness programs,⁴ and New York's Jet Blue Airlines makes a range of activities available to employees, such as smoking-cessation programs and completing an Ironman race.⁵

While today these examples of blue-collar wellness programs are the exception rather than the rule, in the coming years we predict that wellness programs in industrial and service settings will gradually become more commonplace, and more workers around the globe will be able to take advantage of wellness offerings that can ultimately save their employers money and help them live healthier lives.

Perhaps one day we will even see a construction crew taking a break to perform a few 'downward dogs'—now that would be a industrial wellness revolution.

FUELING THE TREND

A Global Obesity Epidemic

According to the World Health Organization (WHO) worldwide obesity, defined as people who have a BMI greater than or equal to 30, has nearly doubled since 1980, and in 2008 more than 1.4 billion adults, 20 and older, were overweight with a BMI greater or equal to 20 (meaning 35 percent of adults were overweight). Obesity and diabetes, which are largely preventable, are leading risks for global deaths. WHO also reports that 44 percent of the diabetes burden, 23 percent of the ischaemic heart disease and between seven and 41 percent of certain cancers are attributable to these conditions.⁶

Governments, business and insurance providers are paying attention to the human and financial consequences of these jaw-dropping statistics and adopting policies and programs that are designed to reduce health care costs, decrease absenteeism due to disease or illness and increase productivity. WHO also notes that making a healthier choice of foods and regular physical activity the easiest choice can prevent obesity and recommends "... sustained political commitment and the collaboration of many public and private stakeholders."

Rising Cost of Health Care

The world's aging population, which is expected to more than triple again over the next half-century is placing a huge burden on the health care system in many markets. The increase in chronic diseases – heart disease, stroke, cancer, chronic respiratory diseases, diabetes, and mental illness, among others, which represent 63 percent of all death, have a huge impact on health care costs.

Increasing Support from Governments

Countries like Canada, Germany and the UK have offered subsidized health care insurance programs for many years, and more countries are recognizing the need for government to level the health care playing field and provide more universal coverage options. Some recent legislation, like the U.S. Affordable Care

Act (ACH), also increases support for workplace wellness programs, such as those that reimburse for the cost of membership in a fitness center.⁷ Changes in the ACH increase the maximum permissible reward under a health-contingent wellness program from 20 percent to 30 percent of the cost of health coverage, and further increases the maximum reward to as much as 50 percent for programs designed to prevent or reduce tobacco use.

Labor Unions

Labor unions see wellness offerings as an opportunity for their membership. The AFL-CIO website notes that each person's health status and risk factors are unique, and "...identifying potential problems and charting a course to good health require adequate risk assessment and screening to make appropriate preventive treatments...possible."

Recognition of the Role of Stress and Importance of Mental Health

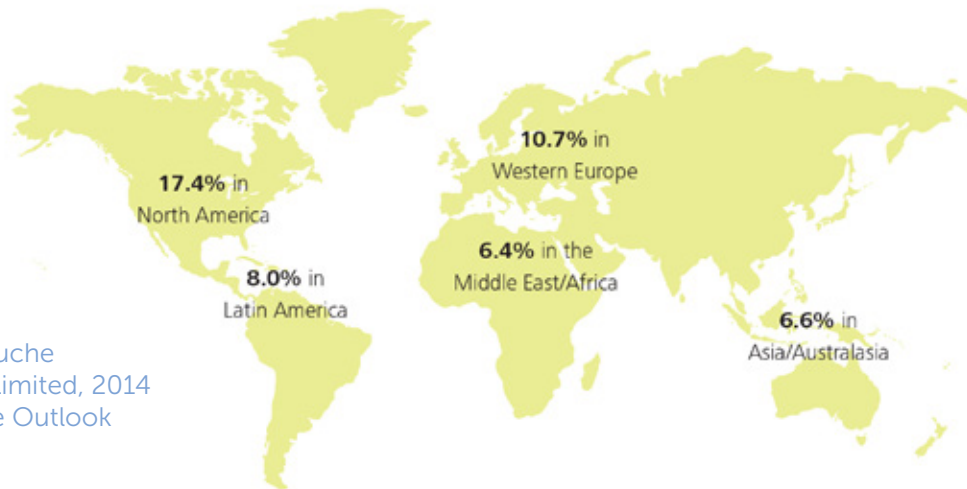
One of the largest and best studies tracked 70,000 people over a 10-year period and found that moderate stress increases the risk of death by 40 percent and highly symptomatic stress increased it by more than 90 percent. Health care administrators are adding stress management programs and meditation training to the wellness mix.⁸

New Generation of Millennials Expect Health Options

By some estimates, nearly 80 million Millennials (young adults born between the 1980s to early 2000s) make up today's global workforce. More than other generations in the workforce, this demographic is the most likely to want employers to play an active role in supporting their overall health and wellbeing.⁹

More than half (52 percent) of Millennials said "living or working in a healthy environment" is influential to their personal health, compared with 42 percent of respondents from Generation X and 35 percent of Baby Boomers.

GLOBAL HEALTH CARE SPENDING AS A PERCENTAGE OF GROSS DOMESTIC PRODUCT (10.5% AVERAGE)



Deloitte Touche
Tohmatsu Limited, 2014
Health Care Outlook

THE TREND

Experts like Brenda Sillas, senior consulting specialist, human capital practice, with the Willis Group, predict that there will be a worksite wellness boom in the next five years but she acknowledges there are special challenges in industrial settings. "Forward thinking companies like Google and Facebook were among the first to recognize the benefits of creating a wellness environment but most companies have been focused on health assessments, biometric screening and carrot-stick approaches to weight loss or smoking cessation. That is changing," said Sillas. "We are seeing a new understanding of the role wellness programs can play in maintaining a high-performing workforce—including those that employ workers in construction, manufacturing or transportation settings."

Sillas noted that wellness specialist is a growing job category, and many companies are recruiting full-time wellness coordinators, who develop and oversee wellness and life enrichment programs and guidelines for best wellness practices, along with other wellness-focused initiatives.

She also agreed that Millennials who are entering the workforce expect more health benefits and a wellness environment. "They value wellbeing and when they are making job decisions, they will look at the company's commitment to supporting a healthy workplace."

ASPECTS OF THE TREND

The Power of Research

Authoritative, scientific research can provide a strong argument for incorporating wellness programs in the workplace. WellnessEvidence.com, which was developed by the Global Wellness Institute, presents thousands of studies evaluating the benefits of approaches like exercise, stress management, acupuncture, meditation or yoga on pain and illness –making it easy to search the most relevant, authoritative sources of evidence-based medicine and providing corporate wellness professionals with the hard science and best practices for core wellness-related approaches and disciplines.

And there is ample research showing that more companies are adopting wellness programs, with positive results—research that provides examples of companies considering adding or expanding a wellness program. A 2013 employer survey¹⁰ found that the amount corporate employers planned to spend in per-employee wellness-based initiatives would grow to an average of \$521 per employee, double from 2009. The report defines wellness programs as, "...condition-management services (e.g., managing insulin treatments), lifestyle-management services (e.g., weight loss advice), health-risk management services (e.g., on-site flu shots), and environmental enhancements (e.g., bike racks, walking paths)."¹¹

A study of Xerox Corporation employees conducted by the University of Michigan found that those with high health risks tended to have the highest workers' compensation costs. And a National Council of Compensation Insurance (NCCI) project, "Indemnity Benefit Duration and Obesity," found that lost-time duration of obese claimants is a multiple of non-obese claimants. According to their findings obese claimants were twice as likely to file a claim and had an indemnity duration that averaged about 13 times higher.¹²

Perhaps most telling for this trend report are findings from a 2011 study of workers' health across occupation groups conducted by the research group Gallup and wellness company Healthways. The survey found that blue-collar workers had more health concerns than other groups, such as teachers or doctors: Notably, 37 percent of transportation workers and 30.7 percent of manufacturing and production employees were obese, and smoking was prevalent for over one-third of those working in mining and construction. The Gallup report also points out that medical costs in 2008 for obese individuals were \$1,429 per year higher than for those of normal weight, according to the CDC.^{13 14} Poor health outcomes are also well documented for smokers.

And a study by researchers at Harvard University found that workers in blue-collar jobs are 40 per cent more likely to suffer and die from a heart attack or stroke than others.¹⁵

First Movers Innovate and Inspire

As mentioned above, U.S. companies like American Apparel, JetBlue and Bama Company, Inc. have received favorable attention for their leadership in bringing worksite wellness programs to garment, transportation and food service workers. These are just three examples of the growing number of companies that are creating forward-thinking worksite wellness programs.

German auto manufacturer Volkswagen added an innovative fitness program for production workers in its plant in Chattanooga, TN. According to the *Associated Press*, fitness trainers lead new employees through two-hour daily workout sessions that are "...



At **Volkswagen** fitness trainers lead new employees through daily workouts to create "industrial athletes."

individually tailored to their future production jobs that include the paint shop, body shop and assembly... with a goal of (forging) an 'industrial athlete' who can lift, grip, bend and push without flagging.¹⁶

There isn't a weight threshold to keep a job but some workers report that they lost 30 pounds in three weeks of workouts.¹⁷

The Volkswagen program, which is designed to help employees prevent injury, is especially innovative, given that the U.S. Bureau of Labor Statistics reports that musculoskeletal disorders accounted for 33 percent of reported injury and illness compensation claims in 2013.¹⁸ Data from the California Workers' Compensation Institute (CWCI) shows that back injuries were also the highest injury in California between 2001 and 2011 making up 26.3 percent of workers' compensation payments, and that 44 percent of back-related claims resulted in lost work time. CWCI noted that workers in manufacturing, construction, agriculture and health care industries made the most claims.¹⁹

In 2014, Walmart, through the Walmart Foundation, put its toe in the global wellness water by announcing a joint project with BSR (Business for Social Responsibility) a global nonprofit organization that works with a network of member companies to build a just and sustainable world. The three-year Women in Factories China, will train more than 26,000 women factory workers in life, and leadership skills—including health and wellness. While each female employee will receive just 15 hours of training, the program is a step towards improving wellness for factory workers around the world. According to the BSI press release, the initiative is part of a worldwide Walmart program to

empower 60,000 women working in 150 factories in Bangladesh, China, El Salvador, Honduras, and India.

PPG Industries, the mega-manufacturer of paint, glass, coatings and specialty products, employs 42,000 workers worldwide at 150 locations. In 2010 the company launched a "Creating a Culture of Health Initiative," which focused on providing education and guidance on topics such as weight loss, exercise and relaxing to encourage healthy living and reduce costs and production losses due to health problems. In 2013 PPG decreased its illness and injury rates by 12 percent, exceeding the 2013 goal by seven percent, and had implemented the program at 75 percent of manufacturing sites. The company aims to have full implementation by 2020.²⁰

The Role of Spa & Wellness

Spas and health resorts are known for wellness, and an increasing number market services as "executive or corporate wellness programs," often including pre- and post-health screening, education and training plus follow up to help participants stay on track.

Florida-based Pritikin Longevity Center & Spa's renowned corporate-wellness programs are custom-designed, ranging from three days to two weeks and include executive physicals and consultations with board-certified physicians; workshops on nutrition, stress management, and heart health; fitness training

Rancho La Puerta in Baja, California has a well-deserved reputation for its corporate wellness program.

and healthy, high-energy meals and snacks. One success story: 21 pilots who were sent to Pritikin because they were grounded for heart disease, diabetes, or hypertension. Three months later, 18 were flying again.

Sparkling Hill (British Columbia) offers innovative corporate wellness programs, with special functional fitness options like a Healthy Backs Workshops. Its Clinic at KurSpa provides a comprehensive integrative medicine program, including Naturopathic services and treatments.

Award-winning Hilton Head Health's (South Carolina) LIVE Well, a week-long individualized healthy living program, and LOSE Well, a four-week intensive weight loss program, is also popular with corporations looking to jump start the health of executives and select employees. Both aim to equip participants with the knowledge and tools, along with the support and practice, to make sustainable lifestyle changes.

In fact, nearly every well-known destination spa—Rancho La Puerta, Baja, California, Gwinganna Health Retreat, Australia, Canyon Ranch, Cal-A-Vie Health Spa and Golden Door in the U.S., SHA Wellness Clinic, Spain, and Chiva-Som Health Retreat, Thailand, offer some type of executive wellness program—but it is not feasible for a company to extend this benefit to 10,000+ assembly line workers. More resort spas (Fox Hills, UK, Scotsman Hotel & Spa, Scotland and Banyan Tree Private Collection in Asia, to name a few, also offer packages and memberships for businesses. Those who attend and experience positive results are more likely to be receptive to company-wide programs for weight-loss, fitness, stress management, etc.





Forward-thinking companies like **Google** offer employees activities that are fun—and help them stay healthy.

Numerous day spas and wellness facilities also make a wide range of services available to businesses: Massage Envy offers group membership discounts. The Wellness Spa's (Wisconsin) Corporate Living Wellness Program, provides on-site massage, Tai Chi for wellness breaks, and activity and lecture sessions to help employees take charge of their own health and wellness. Nuffield Health Services in the UK helps companies create custom fitness solutions, from integrated wellbeing facilities to gyms to massage rooms.

Spa and wellness gift cards, such as those offered by Spafinder Wellness 365, are also used as rewards and incentives to motivate program participants and help them stay on track.

While it is encouraging that an increasing number of spa and wellness facilities are offering services to businesses, at this point the offerings are piecemeal, and the benefits of "spa" programs are often not always understood by wellness program administrators and management.

Choice Leads to Engagement

Companies like Spafinder Wellness, author of this report, and MINDBODY™, provide employers with a network of fitness and wellness providers, giving wellness program administrators the opportunity to offer employees a choice of fitness activities, from yoga to Pilates to marital arts. A survey of North American workers, conducted by Spafinder²¹ found

that if businesses want to get workers engaged with, and stick to, new, healthy behaviors, they need to provide them with access to a broader range of fitness/wellness activities that go beyond a traditional gym membership. Approximately nine in 10 employees who tried a new fitness/wellness activity reported they felt inspired to continue it on a consistent basis (86 percent).

Incentive + Rewards = Results

Spas and wellness providers have an exceptional opportunity to provide incentives that can only be used for healthy activities, gift cards offered by Corporate Wellness 365 (a Spafinder Wellness, Inc. company), can be used by employees at over 20,000 locations for the spa or fitness activity they choose.

An article in *The Wall Street Journal*²² reports that, according to a study conducted by the Fidelity Investments and National Business Group for Health, nearly 90 percent of companies offer employees incentives or rewards for getting healthier, up from 57 percent in 2009. The article outlined various reward categories, such as rewards that require an action or incentives for progress (weight loss or quitting smoking). Typically, rewards are in the form of cash, a reduction in the participant's health insurance premium or co-pay and gift cards or vouchers, and the Lockton Benefits Group notes that an incentive of \$100 or more motivates 75 percent of employees to participate.

Cafeterias stocked with organic food are just one way companies create a healthy workplace.



New solutions connect wellness professionals around the world with employee programs.



THE FUTURE

We could write a book on just the research that has been devoted to the pros and cons of corporate, employee and worksite wellness programs, but one thing is clear: these programs are here to stay and have become a fixture in worksites around the world. However, it is also obvious that currently the most innovative programs are available to employees who have highly desirable skills or are in white collar or management positions. Offerings are limited for many blue-collar workers, especially those that work off site or are in countries with emerging economies. There are notable exceptions like Volkswagen, and we hope to see every auto manufacturer offering new employees fitness programs to help them stay injury-free and more productive in the future.

We forecast that in years ahead more employers in industrial, construction, transportation, manufacturing, etc. sectors will understand that they may have the most to gain from programs that truly engage their employees in a healthier lifestyle—and that technology advancements will help more of these workers participate in programs. There will also be more research devoted to the unique challenges in helping these employees (lack of education, resistance to wellness habits) and the disconnect between programs and benefits offered to employees who work in office and creative environments and those on the factory floor.

Massage or yoga breaks at a dress factory in China? A smart phone app to remind a concrete worker in Las Vegas it is time to take a break and stretch? Employees at an automaker in Mexico rewarded for every five pounds they lose? It won't happen overnight but don't be surprised if you see these innovations and more in the next five years. A lot has happened since 2009 and there is more good wellness news on the way.

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5

Wellness Homes, Communities & Cities

360° HEALTHY LIVING, 365 DAYS A YEAR

"It is health that is real wealth and not
pieces of gold and silver"

- MAHATMA GANDHI



Wellness Homes, Communities & Cities

360° Healthy Living, 365 Days a Year



THE TREND HIGHLIGHTS

- Entire communities being built and branded around a 365-degree concept of wellness
- Baking more “passive” health and wellness features into all the rooms people live in
- Greater market sophistication, with mixed-use hospitality-residence wellness properties designed more smartly
- Greater affordability and accessibility, with wellness-focused building moving beyond the home to all indoor environments
- New global guidelines, like the “Well Building Standard”
- More companies developing products and technology for healthy homes
- Demand becoming more global, with particularly vibrant activity in Asia

BACKGROUND

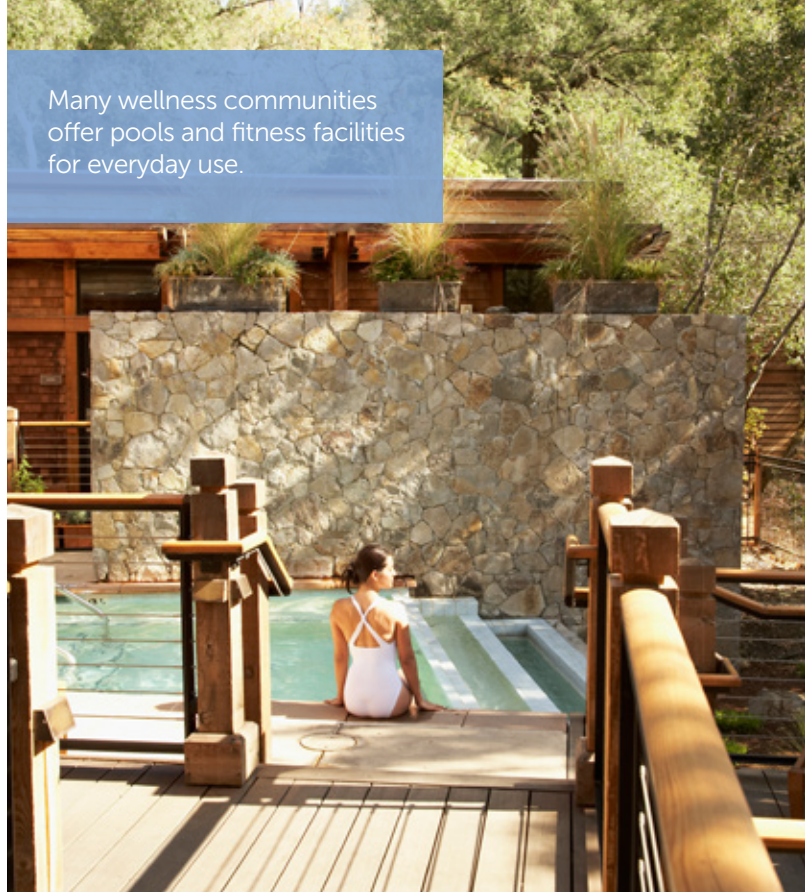
Back in 2007 Spafinder named “spa real estate” a top trend, after tracking the rise of a new breed of residence that essentially let people live at a luxury spa. The concept was pioneered by high-profile destination spas, like Canyon Ranch Living, which launched in Miami Beach in 2007, and Miraval Living, which planned to open in New York City around 2008. And the first wave also saw destination spas like Red Mountain Resort & Spa (Utah) and Terme di Saturnia (Italy), and numerous hotel/resort spas, add condos and villas. Fueled by the early 2000’s economic boom, by 2007 over 250 global spa real estate options were listed at www.spafinder.com. Then the recession hit, and many of these projects (on the drawing board or newly launched), crashed right along with the economy.

Now, with both the economy and stress levels on the rise, we’re seeing the wellness living market roar back, but with more comprehensive concepts of what a

master-planned healthy home, community or city could be. Spa and fitness amenities are still very much part of the picture, as is eco-minded building. But the new wellness residences are thinking far beyond amenities, and tackling not just planetary but human health in design and construction.

"After decades of a wellness revolution, and given the fact that we spend, on average, 90 percent of our time indoors, it's almost odd that it's taken so long for wellness to really come 'home,'" said Alfredo Carvajal, president of international and signature programs at Delos. "And this trend is not a fad, it's the very future of real estate, because for many more people, healthy really is the new wealthy. And in the future, being able to live and work in places that deliver evidence-based wellness features through the built environment (like optimized air, water and lighting) will become a right not a privilege."

Many wellness communities offer pools and fitness facilities for everyday use.



FUELING THE TREND

Economic Recovery & Consumer Demand for Everyday Wellness

Economic recovery is a powerful driver of the new wellness living trend, and the concept also lies at the intersection of two hot markets: real estate, a \$150 trillion global asset, and wellness, a \$3.4 trillion annual market.¹ If wellness living developments (estimated at \$100 billion globally²) are now just a fraction of the real estate market, new consumer interest is creating economic incentive. Just one indication of how global demand has become: a new survey from India³ reports that, for 69 percent of homebuyers, the "sensation and feeling of wellness" is "very important," with 88 percent ready to pay a premium.

Scientific Confirmation of Impact

Research mounts that diverse building elements can have a positive impact on human health and productivity. Dozens of studies exist on the impact of green spaces and natural light on human bodies and brains, from University of Illinois research showing that public housing with greater amounts of vegetation experience 52 percent less crime⁴ to a recent Northwestern University study revealing that cubicle-imprisoned workers deprived of natural sunlight sleep 46 minutes less each night and are

four times less active during the workday.⁵ The recognition of human "biophilia" (our hardwired need to connect with nature) is prompting homebuilders, workplaces, hospitals and schools to design/redesign interiors with access to natural light and greenery, and for many more cities (from Birmingham, England to Wellington, New Zealand) to create urban designs that bring people and nature together. And with research showing that pollutant concentrations are two to five times higher indoors than out⁶ –and with 300 million people suffering from asthma worldwide⁷ – a focus on air purification and anti-microbial and anti-allergenic indoor environments is ramping up.

Urbanization Driving "City Oasis" and "Satellite Wellness City" Trends

The world will continue to urbanize at an unprecedented rate (more than half of us now live in cities),⁸ so humans live in more stressful, polluted environments. And this is fueling demand for both urban residences that are essentially "wellness oases" within, as well as new healthy-living-focused "satellite" cities, where commuting is made easy, but people and families can experience more space, community, nature, outdoor fitness and everything from great schools to farmed food.

ASPECTS OF THE TREND

Wellness Communities, Towns & Cities

The most ambitious—at times even mind-blowing—aspect of the trend is entire towns and cities built around the most complete concept of wellness imaginable: from nature and fitness to master-planning social, cultural, medical and educational “health” for every age. With growth happening fastest in Asia and the U.S., and with these communities often built through public-private partnerships, the new wellness towns and cities aim to provide a dramatically healthier living alternative to the drive-everywhere, disconnected suburb or the stress—and pollution-crushed city, where people are increasingly priced (and “spaced”) out.

A Few Shining Examples

Lake Nona (Orlando, Florida) is three-quarters the size of Florida’s Walt Disney development (with thousands of acres and homes from the affordable to the grandiose.) And spending time at this new wellness city’s website will make your jaw drop. One can only list a few of the smart, healthy approaches: 44 miles of biking/walking trails. A cutting-edge sports/fitness complex (along with numerous satellite fitness centers). All LEED-certified buildings. New hospitals and research centers. An education system (from kindergarten through college) created

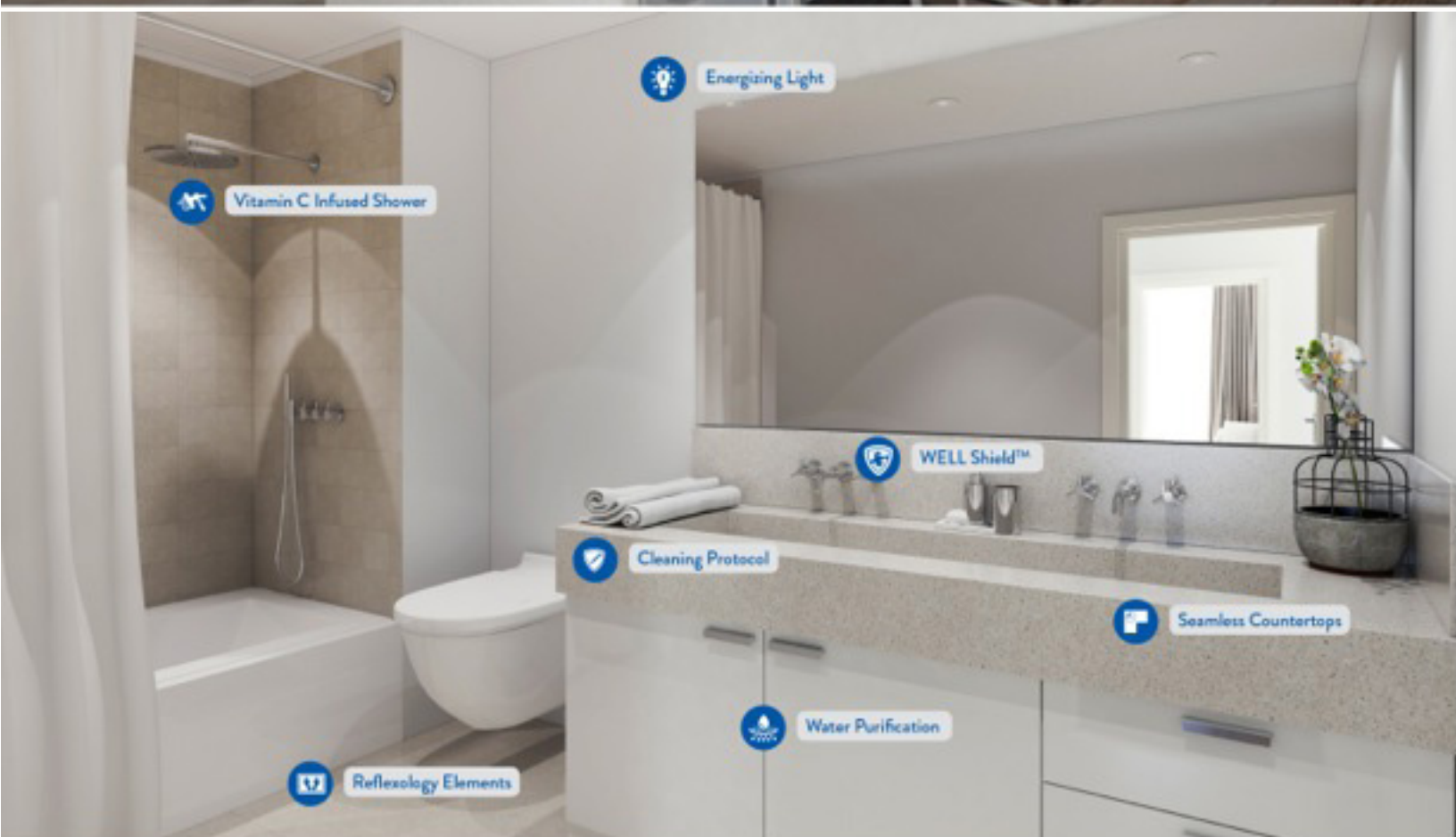
by 30 institutions, with a “Collaborative Learning Environment” allowing residents to learn from doctors, researchers, professors and businesses. A town center with everything walk-able and a nearby airport. Personalized wellness programs for residents, including a community initiative to reduce residents’ Body Mass Index. And a Lake Nona Institute is measuring the impact of all these incredible technologies/innovations, to help model new wellness cities worldwide.

Avira Medini (Johor, Malaysia): A 210-acre, master-planned town just across the bridge from Singapore, whose goal is for every generation to live “in the heart of wellness.” Opening in 2015, its 3,000 residences sold out on launch day in 2013, and Avira Medini immerses commuting professionals (and parents, kids and grandparents) in a holistically healthy life, with a wellness gymnasium, spa, farmer’s market, cooking and art classes, allotment farming and seamless connection to the city and the airport – and with hospitals, universities and even the Ian Fleming Studios, set to move there.

Serenbe: A new, 1,000-acre community outside Atlanta, Georgia has sustainability, organic farming, culture, arts and fitness at its core. Two of the four hamlets, and 180 of the 1,200 homes, are built, the former modeled after English villages and themed around aspects of a “well-lived life.” An arts and culture hamlet houses the playhouse, culinary arts



Serenbe, a new, 1,000-acre community outside Atlanta, Georgia, features sustainability, organic farming and fitness at its core—all themed around aspects of a “well-lived life.” The wellness community will help people “age in place,” with communal homes with nurses built alongside schools.



Some of the built-in wellness features in **Delos Signature Homes**. Alfredo Carvajal, president of international and signature programs at Delos, notes that wellness living is "...the very future of real estate... And in the future, being able to live and work in places that deliver evidence-based wellness features...will become a right not a privilege."



Atlanta's **Serenbe** is a modern twist on the old-fashioned "front porch" community. It is designed to bring people together, and the focus is on playfulness, with activities like spontaneous hayrides.

center and galleries; the agricultural hamlet includes the organic farm and general store; the upcoming health and wellness hamlet will offer medical offices for eastern and western approaches; and a fitness center with yoga and Pilates classes, and a destination spa/hotel are also offered. Serenbe will let people "age in place," with communal homes with nurses built right alongside children's schools, bringing young and old together. It's a modern twist on the old-fashioned "front porch" community where design and programming bring people together. And if wellness can sometimes feel strict, the focus here is on playfulness: like spontaneous hayrides and drive-in movies in the fields.

Wellness Homes

New real estate projects that are focused on keeping occupants healthy are sprouting up like (organic) mushrooms, from Malaysia to New York. We're seeing new urban towers like San Francisco's Nema (hi-tech and hi-wellness for Silicon Valley high-rollers), with its vast fitness center, indoor-outdoor yoga "solarium," "urban-parks-within-a-high-rise" concept and every healthy service imaginable available with a tap of ubiquitous digital screens, from organic food delivery to 24/7 appointments at the spa. We're also seeing many more "a stone's throw from the city"

developments, like the Residences at Afiniti Medini (coming 2015, in Malaysia across the causeway from Singapore), with its massive wellness center (think health screenings, alternative medicine, yoga, Pilates and meditation) and a Corporate Training Center where residents can "Learn Well." And there are out-in-nature developments like Huntsman Springs (Teton Valley, Idaho, U.S.), combining golf with a 500-acre nature preserve; a wellness center with spa, fitness classes, healthy living workshops and personalized wellbeing programs—and where all profits go to the Huntsman Cancer Institute.

Delos is a company whose mission is to transform buildings by incorporating evidence-based wellness features that improve the health and wellbeing of the building's occupants, whether in hotels, schools, restaurants, offices or private residences. And Delos Signature Homes have opened in buildings in Manhattan (66 E. 11th Street) and Philadelphia (the historic ICON Tower). Just a few of the often invisible-to-the-eye features: advanced air and water purification systems, humidity control, circadian rhythm and dawn simulator lighting that energizes by day and regulates melatonin levels for great sleep, "floating" cork floors and reflexology stone pathways that support musculoskeletal health, surfaces with photo-catalytic coating and even centralized aromatherapy dispensers. Celebrity associations can

enhance the appeal of such properties, and both Leonardo Di Caprio and Deepak Chopra are on Delos' Advisory Board.

And there's even activity on the most affordable housing front. In Nashville, Tennessee developer Michael Kenner is creating "affordable, wellness-oriented, workforce housing," including micro-apartments made out of recycled shipping containers, and residents will enjoy the same circadian rhythm lighting that Mr. Di Caprio does. Rapper/songwriter Will.i.am's philanthropic organization, i.am.angel, is involved in a Well Access program (a sub-initiative of the new Well Building Standard) to bring quality air, water and antimicrobial surfaces to 1,200, low-income homes in Los Angeles.

Mixed Use: Hospitality + Residences

In the pre-recession spa real estate model, spa resorts often added residences as an afterthought, and the mixed use concept could mean mixed results. But now hospitality + homes projects are being conceived as hybrid properties from inception, allowing developers to think through the "guest" vs. "living" equation more strategically. Living (whether part or full time) at a gorgeous wellness retreat, where stress-reduction and healthy life programming is a daily affair, has obvious appeal. And the mixed-use trend is surging

globally, with management at famed destination spas like Mii Amo (Sedona, Arizona) reporting they're getting calls from real estate developers looking to tap their know-how.

A Few Standout Examples

GOCO Retreats' very name, "GO" (for travel), and "CO," for wellness living communities, shows that mixed-use is their very identity. And between 2015-2017, seven GOCO Retreats will open in stunning locations from Spain to Shanghai, all focused on authentic, East-meets-West wellness programs with comprehensive spas and thermal experiences. In summer 2015 Goco Retreat Thimpu in Bhutan and GOCO Retreat Khao Yai, in wine country north of Bangkok, will open. In 2016 GOCO Retreat Niuto in greater Beijing launches, the first high-end, mineral springs-based wellness living property in Northern China. In 2017 we'll see The Octave Living Destination Retreat set on a lake just outside Shanghai; GOCO Retreat Barcelona with its organic farm; GOCO Retreat Kaiserhof Rügen, on Germany's largest island in the Baltic Sea; and GOCO Retreat Ubud in Bali, with its Ayurvedic center, organic farm and artists' village. And two wellness retreat/residence projects are on the drawing board for the Western United States.

Between 2015-2017, seven **GOCO Retreats** will open in locations from Spain to Shanghai, all focused on authentic, East-meets-West wellness programs with comprehensive spas and thermal experiences.





Euro Disney and Pierre & Vacances have broken ground on an “organic city” outside Paris called **Villages Nature**.

Six Senses, known for its chic, eco-obsessed, nature-immersed wellness resorts set in breathtaking locations, is embarking on serious global expansion. And part of that drive is more Six Senses Residences, which they call “Indulgent living as nature intended.” Homes at the Con Dao Resort, on a private beach in an archipelago in Southern Vietnam are open, and residences (in rainforest, waterfall or mountain habitats) are coming soon at the Freedom Bay, San Lucia resort. Also in their residence pipeline: the Zil Pasyon resort on an idyllic private island in the Seychelles and the Gammarth Tunisia resort on the Mediterranean coast near Tunis.

Euro Disney and developer Pierre & Vacances have just broken ground (opening 2016) on a mixed-use “organic city” outside Paris called Villages Nature. For tourists and residents it will be all about interacting with nature, with vast green space and a geothermal lagoon, hanging gardens, horseback riding, hiking and an organic farm.

DIY Home Wellness Products

Even if you can’t afford to purchase an upscale, new wellness residence, a slate of new products allow you to give your home or workplace a healthy makeover. Lighting Science makes fixtures/bulbs that align light to your body’s circadian rhythms. Vitashower’s Vitamin-C-packed shower filters/tablets eliminate

chlorine for healthier skin. PURE focuses on the allergy-free home, from hypoallergenic bedding to air purification products. And NaturVention’s indoor ecosystems are high-tech, self-irrigating vertical gardens that purify and humidify the air.

Certification and Laboratories

The International Well Building Institute (IWBI) introduced a new, global WELL Building Standard in Fall 2014, that evaluates homes, workplaces, schools (and basically any “room” imaginable) on how conducive they are to human wellbeing, the way LEED rates buildings for ecological sustainability. Top architects and engineers, and doctors from major institutions like the Mayo and Cleveland Clinics, reviewed 4,000 studies to create the standards for air, water, light, nourishment, fitness, comfort and mind, and how they affect twelve aspects of human health – from cognitive to cardiovascular. The Green Building Certification Institute (GBCI) will provide the third-party certification for both WELL and LEED. These new standards should spur “well building”: the IWBI reports that just a month after “Well Certified” launched, eight million square feet were already under contract for certification. They will accredit their first 50-100 wellness properties by February 2015.

And the revered U.S. medical institution, the Mayo Clinic, will launch the first lab (WellLab@Mayo)

dedicated to the research, development and testing (in real-world living and working conditions) of building innovations designed to improve human health in April, 2015 – providing respected, evidence-based data on what works – and what doesn't.

EVERY Room – from Offices to Dorms

The healthy building trend is extending far beyond homes, with offices, hospitals, schools, and even dormitories, re-thinking what it means to live within their walls. With evidence that workers get sick less often and are more productive if offices have natural light, high-rate air exchange and large communal spaces, more companies are building/redesigning in this direction.

Many more colleges are offering "Wellness Living" dorms, dedicated to supporting student health with fitness, yoga and meditation classes, and nutritional counseling and healthy food. And when Delos designed WELL Signature Suites at The Legacy at Drexel Arms, an off-campus housing facility near St. Joseph's University (Philadelphia), with study- and sleep-friendly features like circadian lighting and advanced air purification systems, they were snapped up by parents.

THE FUTURE

Wellness isn't a tough sell these days. And what could be more logical, after centuries of real estate development too narrowly focused on surface aesthetics and amenities and "curb appeal," rather than paying more attention to building principles and community designs that could actually help the people that live there experience happier, longer lives.

The wellness living trend finally has real momentum. And it will continue to, with major new wellness cities coming that we couldn't report on because they haven't been officially announced. New WELL Building standards will make healthy-for-humans building more understandable and achievable worldwide – further spurring growth. And research on how building elements and community designs actually impact human health will drive growth in the right, science-backed directions. We're really just



Tourists and residents who live at Euro Disney's "organic city" outside Paris will interact with nature and enjoy a vast green space and a geothermal lagoon, hanging gardens, horseback riding, hiking and an organic farm.

starting to understand the ways that interior spaces and communities could be made more "well." And when concepts that don't make human sense, won't make business sense – more innovation is coming.

New technologies and scientific evidence will drive innovation and growth. But much of what is the most healthy about the new wellness communities is that they recall things many have forgotten: like walking to work or school, growing your own food, knowing and caring about neighbors, and young and old living and learning together. A Lake Nona or a Serenbe is hardly a hippie commune, but the principles of true community they're striving for hearken back to the past...and we'll see more of that in the future.

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6

My Fitness. My Tribe. My Life.

SUPER-SOCIAL FITNESS

"Call it a clan, call it a network, call it a tribe, call it a family. Whatever you call it, whoever you are, you need one."

- JANE HOWARD
English Novelist



My Fitness. My Tribe. My Life.

Super-Social Fitness



THE TREND HIGHLIGHTS

- Fitness has become an aspirational, “total lifestyle” pursuit, impacting who people are friendly with, what they wear, where they travel— even how they parent their children.
- Fitness practices have become the important “third place,” after home and work, for the pursuit of health, happiness and connection, reaching far beyond the workout itself into personal style and leisure. This is more than the latest fitness “fad,” but rather a global cultural shift in how people live.
- Spas of all types are upping their game by offering more boutique fitness weeks, fitness packages and outsourcing their fitness programs to branded yoga, barre and Pilates providers.
- Social wellness tourism is on the rise with an explosion of immersive yoga festivals and fitness retreats.
- Social fitness is becoming more mainstream.

BACKGROUND

As trend forecasting becomes trendier—rowing is the new spinning...hot Pilates is the new Bikram...party fitness is the new Zumba—fitness fads of the minute garner deserved attention from the media, wellness influencers and the physically active public. But these persistent hyper headlines warrant some big picture reflection before chasing the latest fads once again. The big story is that the fitness landscape is shifting permanently.

In this report we are stepping back to recognize a colossal socio-cultural evolution within the fitness boom that has been taking shape for more than a decade—and shows no sign of stopping. The new and lasting trend is the deep impact of fitness on an individual’s identity and his or her community, and how fitness studios have become the important “third place” for the pursuit of health, happiness and social connection, with lifestyle implications reaching far beyond the workout itself.

The community and social components surrounding fitness offerings – from the abundance of free yoga in the park events to the explosion of neighborhood boot camps, and Pilates, yoga and spin classes– is at the core of how the health-conscious are living their lives today. And this uber-shift is affecting how people dress, what they eat, who their friends are, who is in their professional network, which celebrities they follow, how they spa, how they raise their children, where they vacation, and more.

Given the unprecedented hours people work, and their paradoxically disconnected lives spent in front of screens, fitness studios and classes are becoming the place where increasingly rare human interaction takes place. And loyalty to instructors and relationships with classmates are fulfilling basic human needs to connect. For today's fitness fanatics, the beating heart of their social circle – their fitness "tribe" – is in many ways, a life-definer.

As Alyssa Carter, co-owner of MetroBeat, a fitness and dance studio in Crystal, MN, describes it, "The entire social life of many of our clients revolves around the studio. They work out with new fitness friends, meet for lunch at the studio, celebrate birthdays, and even vacation, together. It's gratifying to see our members not only enjoy the health benefits of working out, but also know that we're helping them enjoy a happier, more fulfilling life."

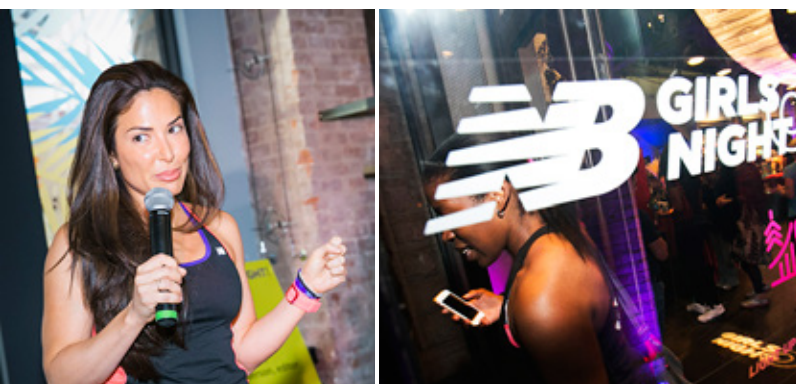
ASPECTS OF THE TREND

Engaging in healthy behavior together is habit-forming and by most accounts, far more fun. Gatherings like after-work drinks, all-night clubbing and boozy Sunday brunches have all been encroached upon by socialized fitness. And, while fitness-tracking mobile apps and streaming fitness classes have proliferated, they are by no means a replacement for good, old-fashioned human contact and cheerleading.

The shift towards social fitness is extraordinarily positive – rather than tackle fitness in isolation, people get motivation, feedback, and encouragement from togetherness. And it's especially helping the young, working woman demographic become empowered and embrace a healthy lifestyle. International athletic footwear giant New Balance recently plugged into the growing social fitness trend with a multi-city Girls Night Out (#NBGNO) event to celebrate and connect like-minded active women. After a warm-up, stretch and group run, the participating New Balance store event then offered women demonstrations with health experts, snacks, drinks and premium gift bags. Events like these result in women finding group runs, new routes, hangouts, and then sharing their selfies across social media channels.

Now fitness is now packaged as a party, often with DJs, bright lights and a rave-y vibe. For instance, alcohol-free morning dance parties like Morning Gloryville (born in London) or Daybreaker in Los Angeles, let those who want to start the day the healthy way sweat alongside shiny, happy, like-minded people. Another powerful social angle: the membership models of a Soulcycle or Flywheel ensure that die-hards can find their cycle sisters and brothers at the dozens of locations in cities across the U.S. when they travel.

Continued on page 35



(Above and next page)
New Balance sponsored a multi-city Girls Night Out to celebrate and connect like-minded active women. Photos by Bianca Jade

FUELING THE TREND

Need for Community in Age of Loneliness

A combination of forces – the breakdown of traditional communities, the rise in single-person households, extended work hours, urbanization, and lives lived in front of screens – has led social scientists to argue that we’re living in an unprecedented new era of loneliness. Globally, more people live alone than at any time in history, with single-person households increasing 50 percent in the last 15 years¹ to become more than 15 percent of all households, a number forecast to skyrocket to 60 percent in thirty years.² The living alone phenomenon is even more pronounced in cities: In Stockholm and Amsterdam, 60 percent of all households are single, and in Munich, Frankfurt, London, Paris,³ Manhattan and Washington DC, 50 percent.⁴ And it’s rampant in the developing world, with India, China and Brazil’s single population growing fastest worldwide.

The Proliferation of Technology

Technology has led to a breakdown in work-life barriers, and the stressful, always-connected to-work reality is making the 40-hour workweek obsolete. The social media revolution means that we all spend countless hours in front of screens, being “alone together.”⁵ Consider this: U.S. adults spend almost twelve hours a day glued to screens/media,⁶ while Britons spend almost nine⁷ – more than either population sleeps on average. In the 1980s, 20 percent of people reported they were lonely at any given time; that number has now doubled to 40 percent.⁸

Women’s Economic Power Surging

While the passion for boutique fitness/yoga classes is rising among men, this trend is led by women, who have never before had so much spending power to devote to their health and wellness. Swedish economist, Dr. Kjell Nordstrom, recently described our global future as an “urban and female Gaga,”⁹ meaning that cities (where women are disproportionately represented) are fast overtaking



New Balance Girls Night Out

countries as the powerhouse economic unit, and that increasingly, women will out-earn, and take more graduate education degrees, than men. The Boston Consulting Group forecasts that women will control 75 percent of all discretionary spending worldwide by 2028, with Nielsen estimating that at that point, women will out-earn men in the U.S. From 2013-2018, women’s annual, global consumer spending will jump from \$20 trillion to \$28 trillion –with their earned income growing 40 percent faster than men’s annually.¹⁰

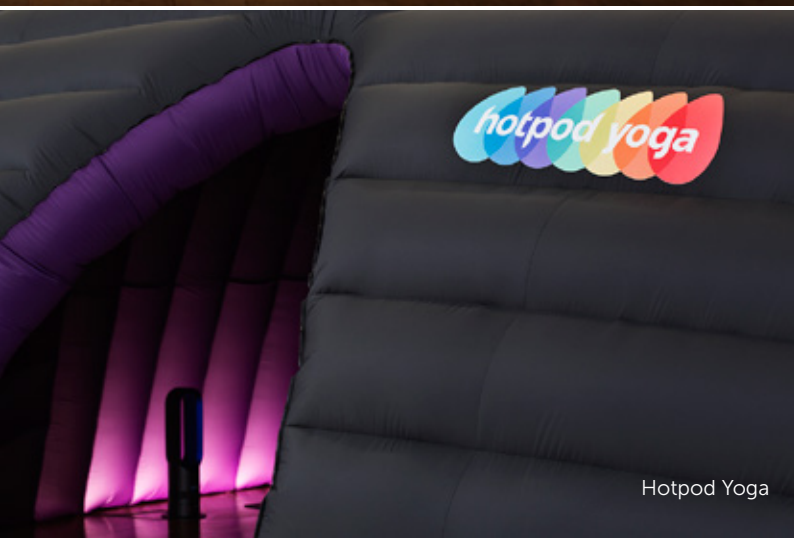
Fashion Industry Keeps Fitness Fast-Moving, Fun & Aspirational

As noted in the Spafinder Wellness 2013 Trend Report, “Label Conscious Fitness,” fitness/yoga brands have been savvy in broadcasting what’s new and hot (and not), and what celebrities are doing to keep fit and beautiful. This aspirational pursuit not only keeps fitness fun, it has transformed consumer behavior, making boutique fitness class (and fashion) consumption a kind of retail therapy, where shopping the newest fitness craze provides pleasures/status similar to snagging that latest “it” bag. And this historic fusion of fitness and fashion is, of course, translating into big business. For instance, in the U.S., the fitness industry is now worth \$22.4 billion, with boutique fitness grabbing ever-bigger market share, to account for more than one in five fitness dollars spent.¹¹ And fitness is quite literally fashion: the craze for athletic and yoga apparel is outpacing the practice of fitness itself: while yoga participation grew 4.5 percent in 2013, sales of yoga apparel were up 45 percent.¹²

With extreme exercise brand Crossfit, known for high-intensity strength and conditioning, participants are encouraged to get comfortable sweating on strangers. Between the small coed class sizes, frequent chatty breaks, and a tribal community, both camaraderie and even romance are fostered. Dozens of Internet videos attest to Crossfit's share of marriage proposals by couples that fell in love amid kettlebell swings.

And for the community of fitness addicts chasing every next, new thing, the options are literally endless. Bored by traditional yoga? Try Hot Pod Yoga (an inflatable, heated space), Yogabeats David Sye (driven by beats and rhythm), Tequila Yoga (said to loosen the practice), Yoga in the Clouds (the highest in the world, at London's Shard building) or Singles Yoga, where you might meet your new significant other.

Hot Pod Yoga, held in an inflatable, heated space, gives fitness addicts endless options like Tequila Yoga and Yoga in the Clouds.



Hotpod Yoga



CrossFit's trendy shirts let people make bold statements about fitness-as-their-life.

Looking the Part: Fitness Fashion

Due to the explosion of social fitness, working out is far more glamorous than ever before—it's not just that yoga pants are worn like jeans, brands are designing for women who want to express themselves comfortably and creatively. Big name designers like Tory Burch and Stella McCartney, as well up-and-comers dedicated to sexy-cool fitness fashion, are creating collections being worn from the studio to the street. Active wear is suddenly being launched by unexpected brands like boho-chic Free People and Urban Outfitters.

And fitness brands are deep into the fitness fashion game. Zumba-branded harem pants scream Zumba-lover. Pure Barre's logo-donned headbands and their "new mommy" sticky socks in blue or pink, inspire people to endorse their chosen fitness franchise. Sassy graphic tees labeling oneself a "Spiritual Gangster" (by Carbon38) or plugging one of Crossfit's many mantras, "Talk Less Lift More," are letting people make bold statements about fitness-as-their-life.

Sports heroes still continue to drive spending, fueling the success of Olympian Kristi Yamaguchi's fitness apparel line Tsu.Ya, designed for busy, on-the-go lifestyles, like her own as a mom. The UK's Sweaty Betty features sport-specific fashion for barre, cycle, dance, run, ski, swim, yoga and statement apparel. The retailer also offers in-store classes and at-home workout videos, fostering community.



Travel with the Fitness Tribe

The social fitness boom has bubbled over into the travel industry, illustrating once again how a fitness family becomes life, and influencing where people choose to vacation, and with whom. While there has already been a steady uptick in wellness tourism over the decade (now a \$494 billion global industry*), loyalty to boutique fitness offerings has people traveling on fitness-themed retreats with their favorite instructor and class pals.

Another sign of the social wellness tourism phenomenon is the explosion of global yoga festivals. Modeled after epic, days-long rock festivals, events like Hanuman and Wanderlust are held in stunning natural settings around the world and attract thousands. Beginners, yogis and even families are traveling to Colorado, California, Australia, Whistler, New Zealand, Chile and beyond for “mega-classes” with famed yoga teachers (that include renowned musicians and speakers) for a mindful, celebratory experience. “Bring a friend or make a whole group of new ones,” Wanderlust’s website tells first-timers. Through the discovery of food, wine, craft-making, adventure activities, dancing, and, of course, yoga practice, connections are born in the fun. The Standard Miami hosted Yoga Fest, a daylong retreat offering guests classes by elite instructors amidst a spa, hydrotherapy and hammam playground.

Rustic yoga retreats like Silver Island, set on a private island in the Greek Aegean, offer simple accommodations, but with only ten guests per retreat, they create an intimate, friend-making experience.

Wellness vacations like Perillo’s Learning Journeys, a yoga volunteer program, are offered in destinations like Costa Rica, Greece, Hawaii and India. Travelers create an itinerary based on personal learning goals, and by helping out in a shelter or school, they gain a meaningful connection to the local people.

Because of rising demand for transformative, communal travel, we’ve seen exponential growth for yoga and fitness travel specialists and tour operators, along with fitness/yoga retreat and festival rankings by popular travel publishers. For people with predilections ranging from budget all-inclusive, to women-only, to vegetarian or Ayurvedic meals, to “unplugged,” to super-luxury, a new breed of specialist helps seekers find their tribes. The Travel Yogi, a travel team who visits and handpicks all of their listings, aims to “help yogis unroll their mat on the beach, in the mountains, by the sea or under the stars.” Yoga-themed combination tours are rising in every shape imaginable, from yoga safaris in Africa, to yoga-surf cruises in the Galapagos, to yoga-cooking retreats in Tuscany. Or for lovers of both happy hours and health, one can experience yoga and cocktails with celebrity instructor Tara Stiles at the W Hotels Retreat and Spa in the Maldives, or yoga-wine weekends at The Westin Verasa in Napa.

Above: **Silver Island**, set on a private island in the Greek Aegean, creates friend-making opportunities.

Moving into the Spa World

The “fitness family” trend is also spilling over into day spas and stay spas in other ways, as they are upping their game by offering more boutique fitness weeks, fitness packages and outsourcing their fitness studios to branded yoga, barre and Pilates providers. This is helping spas attract new customers, along with the local market, as their offerings become more focused on comprehensive, daily wellness rather than mere pampering. The once often isolating, hushed spa experience is getting significantly more social as well, as more spas and hotels re-think facilities and create more playful community spaces for both fitness and spa.

More Inclusive: Men, Children and More Affordable Options

Social wellness is not just for upper-class women anymore. Men are embracing group fitness in droves, particularly with obstacle/mud runs, extreme fitness, triathlons, spinning, and Broga® Yoga (geared specifically for men). Athleisure retailers like Prana and Lululemon are selling far more than one style of men’s yoga pants.

And children are part of the growing social fitness demographic. Yoga for kids and even programs like CrossFit Kids are creating the workout habit even before adolescence. And the boutique fitness pursuit, that some have deemed classist (single classes can cost as much as \$70) or cultish, is now there for the moving masses. Offerings like Treadmill Class, TRX and generic spin classes are available at community centers across the U.S., and free outdoor yoga or YMCA events are making communal yoga more experiential and accessible.

THE FUTURE

Social fitness is a mega-trend, and the connection-hungry demographic will only continue to grow as long work hours and global loneliness sharpen. In 2015 and beyond this trend will expand beyond early adopters and go mainstream, as more people experience the value of sharing goals, values, support, get-healthy tactics and time with a fitness family.



The Travel Yogi strives to “help yogis unroll their mat on the beach...or under the stars.”

This trend will continue to have profound ripple effects, as we continue to favor daylong dressing in “athleisure” over jeans, Instagram ourselves and our besties at a barre studio opening where devotees and celebrities are invited, spend happy hour on a hotel rooftop practicing yoga with co-workers, vacation with our favorite instructor at a yoga retreat– even meet our significant other at a cycling class.

And the trend is rapidly spreading beyond Europe and the U.S. to Asia, South America and other developing regions. We’ll see more branded gyms/studios with a global membership model, and more warm weather fitness/yoga festivals multiply in locales worldwide.

Although an uber trend, it’s still in its infancy. And we predict exponential growth in, and for, businesses and brands that cater to our deep need for both social connection and a healthier lifestyle.

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- 1 Cited *Marie Claire*, “Rise of Single Person Households,” September 2014.
 - 2 Swedish economist Dr. Kjell Nordstrom speaking at the 2014 Global Spa & Wellness Summit.
 - 3 Euromonitor data, 2014.
 - 4 *The New York Times*, “One’s a Crowd,” February 2012.
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 - 7 Ofcom survey, 2014.
 - 8 Cited by John Cacioppo in his TedX Des Moines talk, 2013.
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7

Spa On Arrival (& En Route)

THE NEW TRAVEL RITUAL

"Amidst the worldly comings and goings, observe how endings become beginnings."

- LAO TZU,
Tao Te Ching



Spa On Arrival (& En Route)

The New Travel Ritual

Oberoi Hotels & Resorts



THE TREND HIGHLIGHTS

- Travelers are demanding wellness - in the form of treatments, exercise or just local, natural foods - as they arrive at their destination
- As leisure travel becomes shortened - frequent long weekends versus one long holiday - it's important to expedite relaxation and spa treatments on arrival do just that
- Consumers want wellness anytime, anywhere and providers are starting to deliver it
- Departing can also trigger a wellness experience as people find wellness options readily available at airports throughout the world
- Delivering spa treatments on arrival is good for business - it puts people immediately into a positive state of mind by giving them something enjoyable to connect with

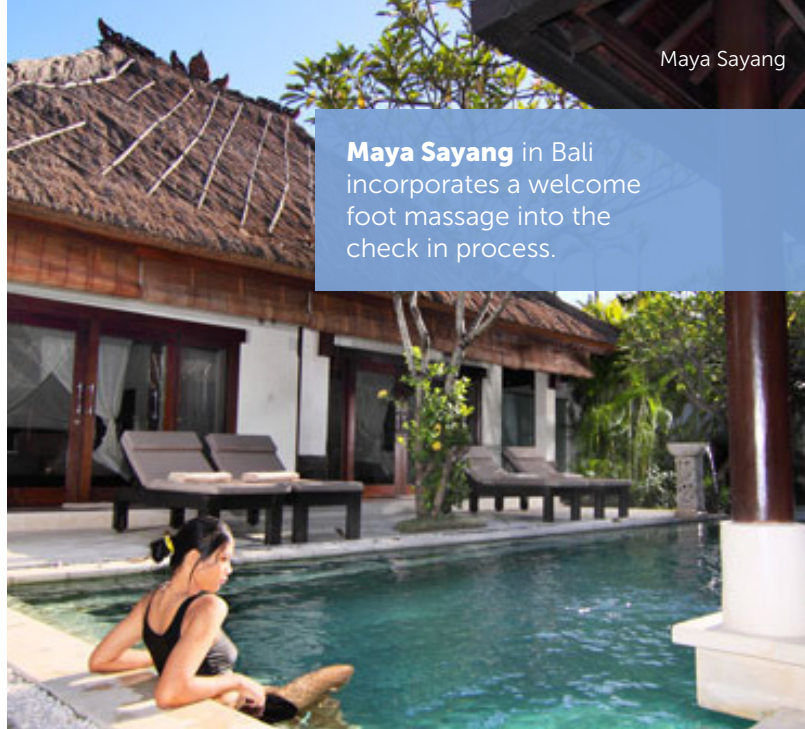
BACKGROUND

It used to be that while traveling for business or pleasure, spa treatments were a luxurious add-on, something fitted in between a meeting and dinner, or perhaps an afternoon treat during a visit to a new city. Now, however, spa treatments and other wellness offerings are being prioritized both en route and on arrival - either to get a head start on relaxation or to kick-start productivity by shaking off travel fatigue. For growing numbers of travelers, a workout or spa experience is becoming the final entry on the travel itinerary - an indispensable post-flight ritual.

We've seen this trend play out over the last few years across airports worldwide. First-class lounges have long been offering spa and beauty treatments to help mitigate the discomfort and stress of travel; and for the rest of us, express spas have become de rigueur in departure terminals. More recently, airport operators have seriously expanded and deepened

the focus on travelers' health and wellbeing, with amenities like healthy food, outdoor spaces and fitness areas all contributing to a positive departure.

In the latest twist on this trend, more and more travelers are seeking rejuvenation the moment they reach their destination, whether it's a self-directed activity (a brisk walk or online yoga class); a specialized workout or spa treatment delivered on arrival either in the room, the hotel spa, or another property in the destination city; and/or a quick post-flight detox with juices and nutritious foods. It's all about nipping jet lag in the bud and hitting the ground feeling alert, energized and relaxed.



Maya Sayang in Bali incorporates a welcome foot massage into the check in process.

FUELING THE TREND

It Does Our Bodies Good

What makes spa such a big part of the itinerary for today's travelers? Our fast-paced world means we all need to hit the ground running, whether it's for a business meeting, a sporting event, a romantic getaway, or the family holiday. We want our brains and bodies in top form. Put simply, the biggest driver in this trend is our growing awareness of what's good for our bodies and minds – and the sooner we can achieve those benefits, the better.

Powering Productivity 24/7

The approach may differ depending on the purpose of travel. For example, business travel dictates that we're sharp and focused – with no excuses for red eye flights, six-hour time changes, or the cramped “anti-yoga” known as seat 22E – so it's critical to get that recovery in full swing as quickly as possible. This may mean hitting the spa for a therapeutic massage right after checking into the hotel, or turning to physical practices that wake up all of the senses.

An offshoot of this trend is the growing adoption of wellness practices (mindfulness, meditation, breathing and even yoga) into the corporate environment, particularly at the start of business meetings. Organizers are becoming aware that problem solving and creativity are greatly enhanced when stress levels are lowered. In turn, more meetings are taking place in locations that inspire (think outdoor, natural

settings); kicking off with group exercise, meditation and mindfulness activities; and including healthy, natural food options (less coffee and bagels, more juices and whole grains).

Making the Most of Limited Time Off

In terms of leisure travel, much of the global population (Asia and North America in particular) takes so few holidays that spa and wellness on arrival is simply about helping us make the most of this rejuvenation opportunity. According to Expedia's 2014 Vacation Deprivation study, 53 percent of worldwide respondents take several short vacations and long weekend trips versus a long holiday. To reap the full benefit of precious time off, relaxation must begin very quickly; and massage, acupressure, reflexology and other bodywork are proven ways to express-deliver stress reduction and relaxation.

Technology Fuels “I Want It Now” Wellness

Consumers demand instant gratification and want what they want when they want it – whether it's yoga at midnight, an in-room massage in the pre-dawn hours, or, more to the point, a post-flight Pilates class. And “the Internet of wellness things” has opened up a world where travelers have access to online booking and concierge services that can deliver spa experiences virtually anytime and anywhere – including en route and, now, on arrival.

SPA ON ARRIVAL: WHERE IT BEGAN

(De)Parting is Such Sweet Spa-ing

We first identified the “en route” part of this trend in our 2014 Spafinder Wellness 365 Trend Report, in which we classified “Airports: From Hellish to Healthy” as a sub-trend of “Healthy Hotels,” a movement in travel and tourism that embraces consumer demand for wellness everywhere. In this trend report, we gave a nod to airports’ subtle evolution from high-end mega-luxury malls to becoming spa oases for travelers – delivering more of what we need: rest, relaxation and stress relief.

Of course, forward-thinking airlines like Virgin Atlantic, British Airways and Qantas have long recognized the need for rest and relaxation, giving their first-class and business travelers access to full-service spa and beauty bars in their lounges. And there’s a Six Senses spa in Etihad’s first-class lounge in Abu Dhabi.

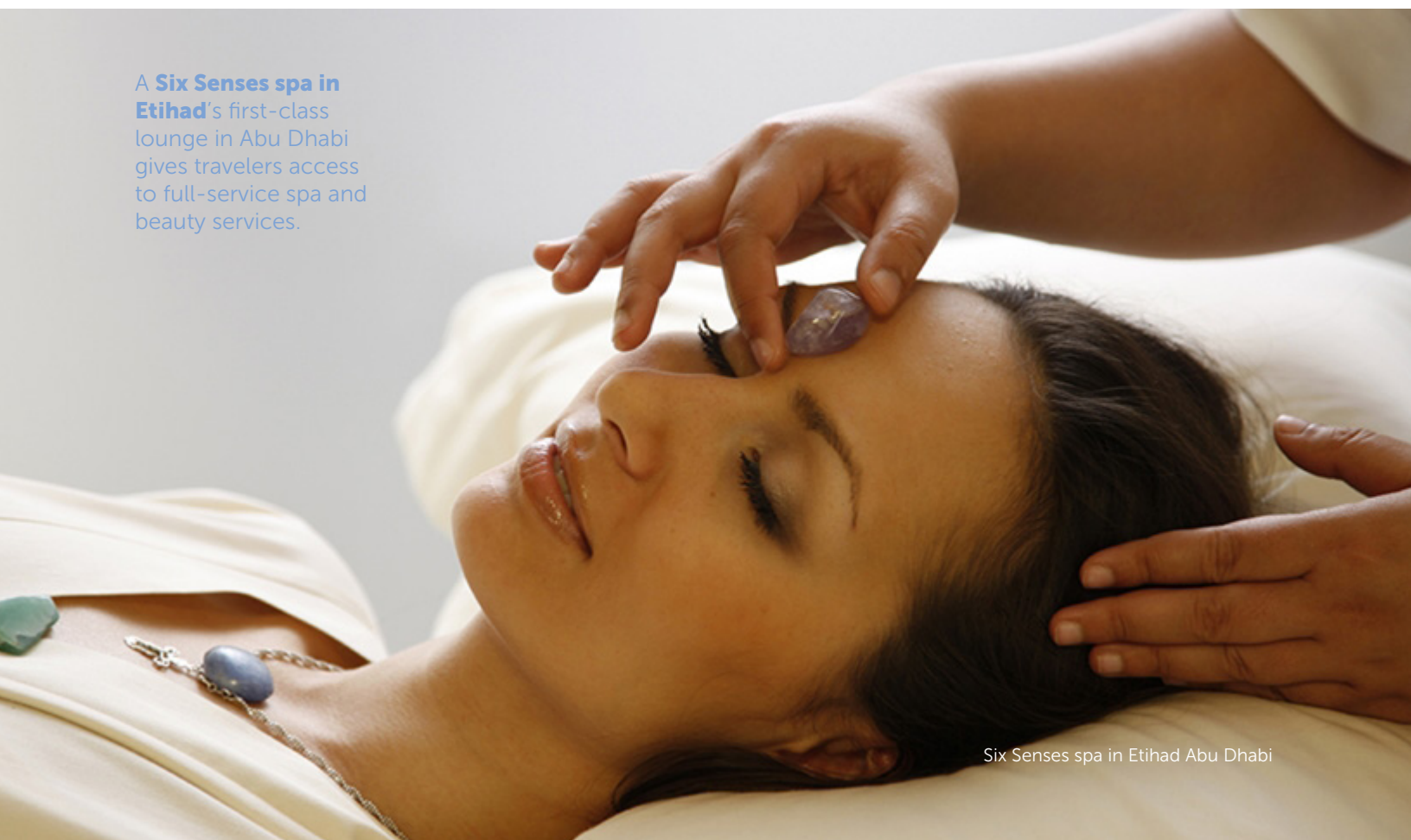
But what’s most impressive today is that almost every major airport has some kind of spa or beauty bar that any traveler can access. These are often brands that were created just for airport travel, such as XpressSpas, with over fifty locations in US airports,

and Be Relax, a 30+ French-based airport spa chain. There are even eco-friendly spas popping up in airports thanks to airports, such as d_parture spa™, which, in addition to its green credentials can also deploy mobile massage units to passengers delayed at the gate in a handful of US airports.

Terminal Wellness

In 2015, forward-thinking airports are taking wellness much more seriously, incorporating wellness activities throughout the terminals. This is great news for travelers who have layovers and are looking to mitigate some of the travel-related stress being inflicted on their minds and bodies. Some new offerings in the US include a two-mile interior fitness trail (importantly, inside the TSA checkpoints) at the Phoenix airport. The Dallas/Fort Worth Airport has also introduced a walking path, along with healthy eating and a yoga studio. And at Boston Logan you can walk and stop at health stations to check your blood pressure and even your Body Mass. Another first mover is Singapore’s Changi Airport where travelers find a rooftop swimming pool and a wellness spa.

A **Six Senses spa** in **Etihad’s** first-class lounge in Abu Dhabi gives travelers access to full-service spa and beauty services.



Six Senses spa in Etihad Abu Dhabi



Dallas/Fort Worth Airport

Passengers enjoy pre-and between-flight fitness breaks at The **Dallas/Fort Worth Airport**, which has a walking path, along with healthy eating and a yoga studio, shown here.

More than simply offering physical wellness, airports are also interested in creating an overall sense of wellbeing by including art exhibits that inspire, architecture that is both beautiful and mood enhancing, and access to outdoor terraces and open-air parks with much-needed fresh air. The new Kuwait International Airport, opening in 2016, promises oasis-style gardens, including waterfalls, inside the terminal.

This rush to upgrade airports to incorporate more wellness is a phenomenon that makes perfect sense when you consider the negative impact air travel has on our bodies: lower oxygen levels result in general fatigue and loss of mental alertness; and, of course, sitting for long periods of time stagnates blood flow, causing uncomfortable swelling as blood collects in our legs and feet ... which leads us to the hot new trend in 2015 and beyond:

Spa on Arrival: The New Necessity

Spas throughout the world, especially those in remote areas that require punishing travel, are also putting post-flight recovery on the "must do" list. The recently opened Cheval Blanc Randheli in the Maldives (operated by LVMH) touts a complimentary 20-minute Jet Lag Recovery massage for all guests at the start of their stay. Others, like Maya Sayang in Bali, incorporate a welcome foot massage into the check in process, while the Emiliano in Brazil's Sao Paulo ushers guests into their full-service spa for a complimentary 15-minute massage.

It's no wonder practitioners like LA-based massage therapist Jessie Rice, who co-owns In-Spiraling Movement Arts, which offers spa services in addition

to Gyrotonics, Gyrokinesis and Pilates training, sees more people stopping by his studio as soon as they touch-down home or kick off their business trip in Los Angeles. "My clients are much more in touch with what's happening with their bodies these days – there's an awareness that didn't exist before. And they know that things like sauna, massage, and physical activities are a great antidote to air travel and can boost recovery time considerably."

At his LA studio, Rice treats businesspeople looking to quickly get over the jetlag; actors and models who need to quickly look their best for the cameras; and even elite athletes who want to jump-start their training and performance in a new time zone.

He acknowledges that seasoned travelers have been aware of the hardships travel creates on the body for some time. The difference today, he contends, is that "this awareness is now going mainstream."

A famous study¹ on how exercise impacted jet lag was conducted by researchers at the University of Toronto who studied male hamsters by stimulating jet lag. The research found that the subjects adjusted to their new timetable with the help of exercise alone.

The finding, said Nicholas Mrosovsky and Peggy A. Salmon in the November 26 issue of *NATURE*, suggested that it may be possible to design exercise schedules that diminish jet lag among humans.



The luxury chain **Oberoi Hotels and Resorts** offers 24-hour spa-ing and fitness for their clientele who arrive any time of the day or night.

back as 2011 (“Spa, In a New York Minute”), and this continues to grow, with Asian day spas taking the lead. In China, the day spa chain Dragonfly does massage late into the night, while Korean day spas across the US offer 24/7 access in places like New York. In Los Angeles, people are known to arrive on late night flights and head directly to one of the popular 24-hour Korean day spas (like Wi Spa or Grand Spa) for a massage. There they fall asleep in the relaxation lounge and wake up refreshed and ready for morning meetings.

Travelers could often find a 24-hour gym, but now look for destinations to guide you on a wellness journey that focuses on outdoor experiences upon arrival. According to an article in *Fodor’s Travel*², travelers can avoid jet lag by spending time in the sunlight, which helps the body reset its time clock to be in sync with new surroundings. Depending on when you arrive at your destination, it may not be possible or practical to find an in-session yoga class; however, one-on-one trainers are available to travelers who can afford them, and the rest of us can opt for free instruction from the any number of online fitness gurus (check out classes from the likes of BeFit, Blogilates, YogaGlo and more).

Wellness Around the Clock: Good for Business

One thing is certain – delivering spa on arrival is good for business. Putting people immediately into a positive state of mind by giving them something they enjoy on such a deep level will make them much more inclined to connect with the place and the brand. Hotel or destination spas are betting that this “connection” and goodwill will translate into the purchase of additional services.

Smart spa and wellness businesses have already been changing to offer treatments the moment people need and demand them. The luxury chain Oberoi Hotels and Resorts offers 24-hour spa-ing for their clientele who arrive any time of the day or night. Expect to see more early morning and late night spa-ing – whether at the hotel destination or at local day spas. Hotel spas that cater to business travelers during the week have long been aware that early hours are necessary to meet the needs of these guests, but look for this to expand as more hotels tap into the “wellness on arrival” vibe by offering everything from tea ceremonies and smoothies at check-in, to in-room aromatherapy designed to overcome the travails of travel, to fitness any time of the day or night.

We reported on the 24-hour spa-ing trend as far

THE FUTURE

In a world where looking and feeling well is the measure of a life best lived, having wellness take the lead when we are coming and going makes perfect sense. Expect to see more spas and fitness studios catering to jet-lagged travelers; more businesses incorporating relaxation techniques to jump start meetings; and spas and fitness facilities becoming as common in airports as newsstands. Spa on arrival has definitely arrived. And fortunately, these days you don’t have to travel far to find it.

1 The Free Library, “Hamster jet lag: running it off,” December 1987.

2 *Fodor’s*, “Top 10 Tips for Avoiding Jet Lag,” February 2014.

8

Hyper-Personalized Beauty

MADE-FOR-ME WILL MATTER MORE

"Always remember that
you are absolutely unique.
Just like everyone else."

- MARGARET MEAD



Hyper-Personalized Beauty

Made-for-Me Will Matter More



THE TREND HIGHLIGHTS

- Consumers have more ability to control and customize beauty and self-care products
- Demand for custom blends of lip and skin colors, lotions, scrubs and aromatherapy treatments are on the rise
- Industry adapts new technologies to customize products and treatments, from Google Glass to 3D printing
- Increased use of questionnaires and onsite counseling to pre-determine individual “skin identities”
- Advances in genetic analysis identify genetic predispositions that may impact health and beauty—and take hyper-personalization to new levels

Above: Spafinder Wellness 365 Senior Editor Jackie Burns creates a custom lip color at Bite Beauty’s **Bite Lip Lab**, in New York City’s Soho. Photos by Paulina Tracz.

BACKGROUND

Skinny Jeans. Army Brat. It List. These are the gutsy names of new eye shadow colors from some of the world’s biggest cosmetics brands. But as much as big companies have ratcheted up the attitude with their makeup branding, their attempt to connect with consumers’ sense of self will have to compete with the emerging—and fastest-growing trend in beauty: hyper-personalization.

In 2015 we will see a shift from “this color looks good on me” to “this color was made for me,” from “Is this moisturizer the best for my skin type?” to “This moisturizer is perfectly formulated for me.” In every corner of beauty care—from makeup to skincare to fragrance at home and in the spa—we’ll have an increasing opportunity to control and customize our beautifying and self-care experience.

And genetic analysis and counseling to determine a patient’s genetic predisposition, along with personalized aesthetic and wellness programs, at

FUELING THE TREND

Co-creators, Not Just Consumers

For a while now, the online world has offered us infinite choices as consumers, but our ability to click options and features is increasingly turning us into product co-developers. According to a Bain & Co. survey of 1,000 online shoppers, more than a quarter of these shoppers, 25-30 percent are seeking-out online customization options.²

The Next Generation

They are called Generation Z—or, as one marketing firm has dubbed them, Generation Edge—and in 2015 the first of them (born in 1995) enter their twenties. This generation prides themselves on being individualistic, rejecting the notion that one size fits all. Females start wearing makeup young, but they use it to uniquely transform themselves—over and over again. And they are also utterly comfortable with using technology to achieve these ever-changing looks. Not only do they know what they want, but they want to create it themselves.

Our Changing Complexion

As ethnic populations are on the rise, the multicultural beauty market is the fastest-growing sector of the overall industry. Meanwhile, mainstream companies have expanded their reach into ethnic communities by offering a wider range of products. But what about all the people who don't fit into a single ethnic category? We are becoming a much more blended population, with the 2010 U.S. Census revealing that our multiple-race population is growing faster than single-race populations. All the variations in skin color, and the need for complementary shades and skin care, will fuel an even greater desire for customization.^{3,4}



Canadian company **Bite Beauty's Bite Lip Lab**, in New York City's Soho, proves a bespoke cosmetics experience can be brought to the streets for an affordable price. Customers flock to the store for customized lip color blending sessions with lab coat-wearing "Lip Lab Artists."

cutting-edge spas like SHA Wellness Clinic in Alicante, Spain take hyper-personalization to a new level.

The result may very well be empowering: "It's finally training our girls to understand the definition of beautiful should be in their control—not the corporation's," says young entrepreneur Grace Choi, creator of Mink, a personal 3D makeup printer that prints a lipstick or eye shadow color of your choice using cosmetic-grade ink.¹

Color Me Whatever I Want, Please

The huge success of Canadian company Bite Beauty's Bite Lip Lab, in New York City's Soho, signals an emerging trend in hyper-personalized cosmetics. Bite has proven that a bespoke cosmetics experience can be brought to the streets for an affordable price. Here, lines form around the block for customized lip-color blending sessions with lab coat-wearing "Lip Lab Artists." The process is presented as a collaboration: Customers talk about what colors they're looking for, pick their ideal combination, choose a scent and finish, and then observe as it comes together—all for a starting price of just under \$40. Upon leaving, visitors feel like they've created something of their own.



Elizabeth Arden's Red Door combine the in-store experience with computer technology to obtain the right personalized hue.

Smart Shades—Tech Helps

Meanwhile, Sephora—and other brands, like Elizabeth Arden's Red Door—are combining the in-store experience with computer technology to get just the right personalized hue. For its Color IQ service, Sephora joined forces with X-Rite (the same scanning process used by Home Depot to get precise paint shades), and programmed a computer to pick one of 112 different colors based on a customer's skin tone. As noted in *Forbes*, the final choice is smartly based on photos taken in three different spots. Once a customer's Color IQ number has been determined, the personalization process continues online with choices for finish, preferred brand, etc.⁵

And the growing desire for a more personalized experience may have given the beauty industry the perfect motivation to find the best use for Google Glass. At Yves Saint Laurent's makeup counters, makeup artists have begun to wear the device to shoot video while they apply their clients' makeup, creating a just-for-you how-to film. With so many people now heading to YouTube to learn the ins and outs of makeup application, this is the next step in custom coaching. (Google Glass is also used by some hairstylists to show their clients how they can re-create that salon look at home.)⁶

It's MY Skin I'm In

Since we all have unique skin care needs, it's no surprise that the customization trend has come to skin care in a major way. And we'll see even more of it in 2015.

For now, much of the personalized product is crafted with the help of online questionnaires. For example, Singapore company Skin Inc. (motto: "It's time for skincare to get personal") determines "skin identity" by asking clients to take a few minutes online—or in person, at one of their retail spaces—to answer some simple questions about their skin. After an analysis of the answers, a highly concentrated "Daily Dose" serum is formulated just for you. "Customizing your own serum allows you to give your skin all that it needs in one step," says Skin Care Global founder, Sabrina Tan.⁷

There's also the "you pick it, we'll make it for you" approach, which gives even more control to the customer. Company TruthArtBeauty asks visitors to their website to choose the natural ingredients best suited to their needs. They then mix the ingredients to create your own customized blend. "... by enabling our customers to select their own ingredients and build their own blends," says founders Emily and Caron, "we are empowering them to learn exactly what's going onto their skin, and into their bodies."

The Insta Private Consult

But what if someone doesn't feel ready to pick her/his own remedies and wants professional personalized skin coaching now? Skin Authority recently launched their Skin Coach On Demand program. Log onto their website and chat instantly with one of their skin experts about your specific skin concerns. Based on your information, they will make recommendations just for you.



TruthArtBeauty invites visitors to their website to choose the natural ingredients best suited to their needs and skin type. They then mix the ingredients to create customized blends.

TruthArtBeauty

Meanwhile, Clinique's recently opened pop-up skin lab in London not only addresses the growing need to provide quick, pro analysis when it comes to personal skincare, but it also caters to the idea that we don't just want custom advice; we want a unique experience. According to an article in *Cosmetics Design-Europe*, visitors learn about their skin via interactive pods, which prompt questions about skin and lifestyle. On-site skin coaches also offer personalized skin consultations. When guests leave, it's with a complimentary custom-fit moisturizer.¹⁰

Personalization Extreme—The Rise of DNA Testing

Apparently, we are increasingly willing to even give our blood for more personalized skin care products. In a study conducted by market research company Canadean¹³, 45 percent of U.K. adults were interested in skin care created in a laboratory and developed for their individual needs. Of those, 54 percent said they would eagerly provide blood, skin, or hair samples to be tested in order to develop tailor-made products. According to Canadean analyst Veronika Zhupanova, "Over 22 percent of skincare consumption by volume globally is driven by individualism, and with the development of new technologies, manufacturers have opportunities to take it to a whole new level."¹¹

And SHA, a pioneering wellness clinic located in Spain, does just that by combining natural therapies with the latest advances in Western medicine, including an

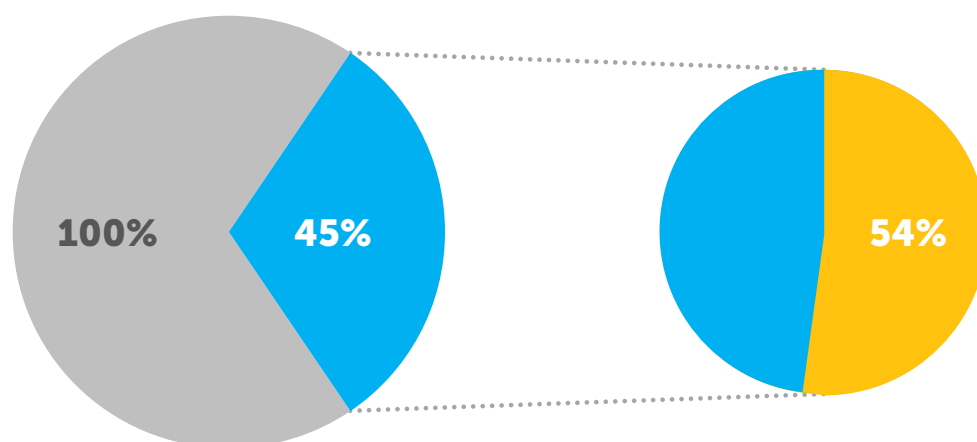


SHA Wellness Clinic in Alicante, Spain take hyper-personalization to a new level by combining natural therapies with the latest advances in Western medicine, including an analysis of the genetic load that predisposes patients to certain illnesses and conditions that may impact health and beauty. SHA Aesthetic Dr. Larissa Perezhogina oversees a personalized aesthetic program for each client.

analysis of the genetic load that predisposes patients to certain illnesses and conditions, such as the need for specific nutrients that may impact health and beauty.

SHA Aesthetic Dr. Larissa Perezhogina oversees a personalized aesthetic program for each patient that measures skin aging, skin hydration, biological skin age (elasticity), skin pigmentation and redness and structural aging. However, experts at SHA note that while it is relevant to convey the importance of genetic predisposition, it is also important to avoid a determinist perception of genetics and ignore the benefits of a healthy and stable lifestyle.

CANADEAN MARKET RESEARCH, 2014



In a study conducted by market research company Canadean¹³, 45 percent of U.K. adults were interested in skin care created in a laboratory and developed for their individual needs. Of those, 54 percent said they would provide blood skin, or hair samples to be tested.



Guests at **The Spa At L'Auberge**, Sedona, Arizona, create bespoke blends of lotions and aromatherapy, infused with local herbs, flowers, and botanicals, in the newly opened on-site L'Apothecary.

U.K. company Geneu also offers DMA testing with its U+ program, which, according to an article on Yahoo.com, analyzes customers' DNA with medical-grade technology so skincare products can be created just for them. Ninety-nine percent of our DNA sequences are actually identical, but it's that one unique percent that can make us respond to chemicals differently. At Geneu, founded by scientist Chris Toumazou, a microchip can analyze clients' DNA test swab within minutes, revealing data about that essential one percent. Armed with this information, Geneu then generates customized skincare serums.

Testing Before You Arrive

Sitting down with a wellness counselor and discussing a personal health plan—for internal health and outer beauty—is not new to the spa and wellness world. But guests sending bodily fluid samples beforehand for analysis? This is a much newer concept and a growing trend. At Vedula Golf & Spa Resort in Sicily, the spa's Vita Health integrated service collects a questionnaire and samples of blood, urine, and saliva

from guests before they reach the resort so the spa can "determine any key hormone, nutrient and health risk factors..." According to Vedula, "blood samples highlight pre-disposing factors and food sensitivities, urine highlights hormone deficiencies while saliva checks adrenal stress levels." More diagnostic tests are given to guests when they arrive, described by Vedula as "non-invasive, scientific," and "carefully selected for you by the doctor." Next, Vita Health provides customized treatments they say, "correct any imbalances found."⁸

A Spa Blend of Your Own

As we increasingly become "collaborators" in the creation of the products we use, more and more spas are providing guests with the option of making bespoke blends of scrubs, lotions, and aromatherapy treatments. For example, at The Spa At L'Auberge, situated in the red-rock splendor of Sedona, Arizona, visitors to the newly opened on-site L'Apothecary create their own pampering mixes infused with local herbs, flowers, and botanicals, including rosemary, juniper, and Sedona pinion.

At Aulani – A Disney Resort & Spa in Ko Olina, Hawaii, family pampering is what drives their spa menu and services. Not only do adults have the option to blend their own scrubs and masks, but teens get their

The **Mink 3D** personal makeup printer creates lipstick or eyeshadow color of your choice using cosmetic grade ink.



very own DIY mixology bar—for hand-crafted body polishes and faces masks—in the resort’s “Painted Sky” teen retreat.

To keep up with this custom-blend trend some spas are even employing the expertise of Salt Lake City’s Paul Heslop and his company, Salt of the Earth, which provides spas with the choice of over 50 signature scents and natural ingredients—including pure sea salt extracted from The Great Salt Lake— so they can set up their spa’s very own blend bar.

THE FUTURE

Free to Be You & Me (With 3D)

Undoubtedly, our one-click-away lifestyles have given us so much more control when it comes to how we take care of and pamper ourselves. We are not just consumers, we are collaborators; we may like the pre-made products offered to us, but we might just feel more connected to the ones we help make ourselves. And we predict that this trend will not be just a passing fancy. It has the potential to disrupt the beauty industry and inspire skin care, make up and beauty product companies to rethink... well....everything.

In 2015 we’ll see how the beauty and spa industry work even harder to respond to this shift. As we see with Grace Choi, the trailblazer behind the Mink 3D personal makeup printer, the next phase might very likely emphasize young entrepreneurs bringing even more cutting-edge technology right into our homes and spas. 3D-printed bath salts next? Could be.

- 1 Forbes, “A Harvard Woman Is Blowing Up The \$55 Billion Beauty Industry With 3D Printed Makeup,” 2014.
- 2 *Los Angeles Times*, “Generation Z (or is that Edge?) Shows a Fluid Sense of Style,” 2014.
- 3 *Skin Inc.*, “Ethnic Beauty Marketers Breaking Boundaries,” 2014
- 4 *Los Angeles Times*, “Generation Z....,” 2014.
- 5 *The New York Times*, “Cosmetic Counters Ramp Up Personalized Service to Keep Up,” 2014.
- 6 <http://www.cosmeticsdesign-europe.com/Business-Financial/Clinique-opens-first-pop-up-skin-lab>.
- 7 Canadian News, “Skin Care Made in the Lab Just for You: The Future of Personalization,” 2014.
- 8 Mainstreet.com, “This Sicilian Spa Asks for a Blood Test,” 2014.



Gut Reactions

THE SCIENCE OF DIGESTION

"Go inside and listen to your body, because your body will never lie to you. Your mind will play tricks, but the way you feel in your heart, in your guts, is the truth."

- **MIGUEL RUIZ,**

**The Four Agreements: A Practical
Guide to Personal Freedom**



Gut Reactions

The Science of Digestion



THE TREND HIGHLIGHTS

- Research on the microbiome will help “gut health” become a mainstream wellness concept
- And it can affect the mind. Medical evidence shows that altering the gut bacteria in mice can change them from timid to bold
- “Leaky gut syndrome” can trigger negative immune responses and can be helped with proper gut health
- Probiotics are not just for the tummy...you can find them in beauty products too.
- More spas around the world are incorporating gut health into their spa and wellness offerings - from diets to detox

BACKGROUND

“Listen to your gut...” Though this is a phrase typically uttered when it comes to following your instincts, it is also one of the hottest trends for 2015 and could be some of the best advice for your overall wellbeing.

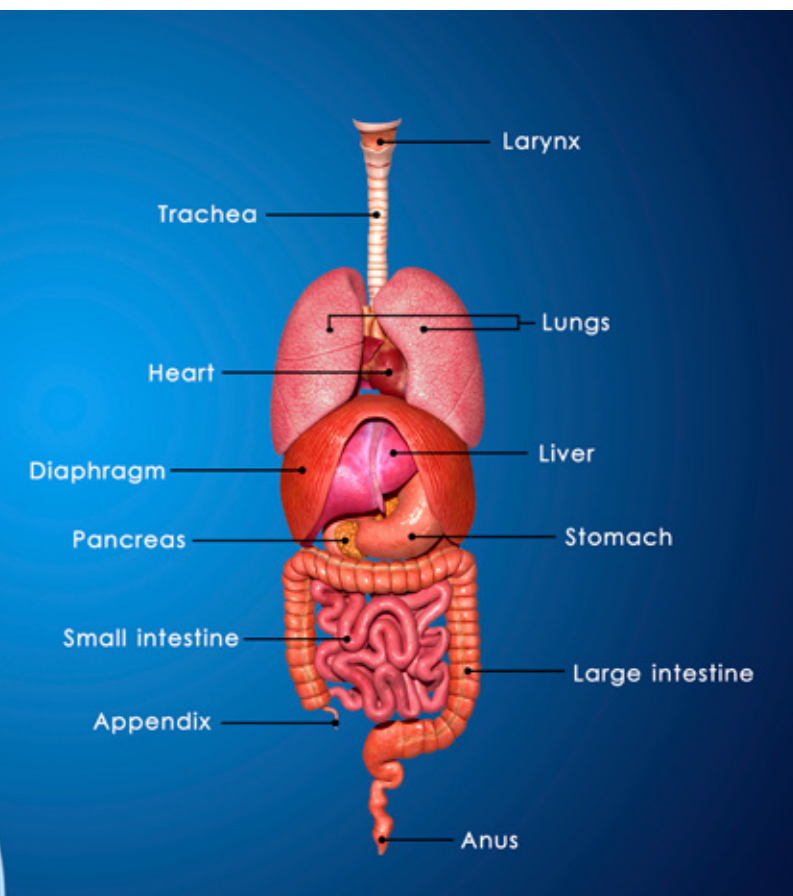
The concept of optimal gut health (keeping our digestive systems healthy) will not be a new one to some reading this – our guts have been a focus of many health and wellness professionals for some time now. However, look for “gut reactions” to grow even bigger and more credible in 2015 and beyond as the thirst for knowledge about the gut’s environmental system (technically termed the “microbiome”) picks up more steam. There will be a huge focus on the science of the gut and proving that by altering the make up of our guts, we can take our health and wellness to a new level, improving our immunity and resilience, fighting off serious diseases, reducing our chances for obesity and even facilitating a happy and healthy mind.

Additionally, Dr. Jim Nicolai, author of Integrative Wellness Rules, says that a healthy microbiome allows the immune system to do its job properly and, therefore, makes us more resilient and able to fight off illness and disease. "When our microbiome is healthy, our intestines are able to retain their integrity and work correctly – to put simply, our guts are working for us and not against us," says Dr. Nicolai.

All of this represents a great opportunity for spa and wellness businesses. We are predicting that cultivating gut health (not to mention the microbiomes in other parts of our bodies – like the skin, the mouth, and even the vagina) will become a mainstream wellness endeavor and there will be significant opportunities for spa and wellness businesses to be a part of this revolution by providing treatments and services or partnering with experts in microbiome health.

The "R" word of choice in the spa industry is no longer "renew," it's "resilience" - and it looks like our guts might hold the key.

The Human Digestive System



The How and Why of Guts

The "gut," essentially the intestinal tract that runs from mouth to anus, is the only organ in the body with its own independent nervous system, an intricate network of 100 million neurons that are embedded in the gut wall. The one-cell bugs that make up the gut are primarily bacteria but there is also yeast, fungus and parasites. What's been discovered in recent years is that the trillions of microbes that make up the human ecosystem, or microbiome, differ greatly from person to person – and even culture to culture (this could explain why a traveler may have problems when drinking water in a certain country when locals have no issues). Understanding how this complex system works and what exactly it is designed to do has become the focus of much interest and research.

A fast emerging school of thought is that, environmentally, through drugs and diet, we have created havoc in our microbiomes that, if reversed, could combat the emergence of common autoimmune conditions, such as food allergies, diabetes and Crohns disease. Much of the disruption in our bodies' ecosystem is blamed on the reliance of antibiotics in modern day medicine, but blame is also leveled also on our diets, sedentary lifestyles and our over indulgence of anti-bacterial lotions and potions. All of which many surmise has altered our bacterial ecosystem for the worse.

Because the industry is in the early stages of researching the gut and its long-term impact on our overall health, a large part of this trend will be dramatically more analysis. Already, there is easy access to DNA testing of our own microbiomes revealing how our gut health compares to other people's (especially compelling if you're on a special diet) or how our gut health changes and evolves over time.

The health industry is in the early stages of researching the gut and its long-term impact on our overall health. This image of the human digestive system shows the many areas that can be affected by diet, an over-reliance on antibiotics and lifestyle—among others.

FUELING THE TREND

Medical Evidence and Studies

This trend is being amped up by a plethora of studies being released about the essential role gut microbes play in our health. Oregon State University recently issued results of a study¹ that said personalized diagnosis of an individual's microbiome could be used to determine which prebiotics or probiotics might help to provide the right, "healthy" balance. The author of the report, Dr. Natalia Shulzhenko, said that contrary to conventional wisdom "our intestines contain more immune cells than the entire rest of our body."

There is other testing being done to prove how the microbes in our gut affect our brain chemistry and the results are pretty amazing. Initial research shows that replacing the gut bacteria of anxious mice with bacteria from fearless mice has had the effect of turning the timid bold.² And scientists have seen aggressive mice calmed down by altering their microbes through diet or probiotics.

One study that will be of special interest to the spa and wellness industry comes from the National Institutes of Health (NIH), which showed there are specific groups of microbes living in our gut that can protect against obesity.³ Ultimately indicating that, despite a healthy diet and exercise, gut microbes could be working against us when it comes to dropping that last ten pounds. And – if we can figure out how to change their balance – we might be able to tip the scales in our favor.

Rise of Digestive Diseases and Food Intolerance

A key reason for our interest in gut health can be traced to what appears to be a marked increase in digestive diseases and food intolerances. We all know people with mild to severe food allergies, be it nuts, wheat or dairy. And then there's a seeming non-stop rise in the proliferation of autoimmune ailments, such as Type 1 Diabetes and ALS; as well as severe digestive track issues, including irritable bowel syndrome and ulcerative colitis. Gut health is a logical means to combat many of these ailments.



The **Chopra Center at Omni La Costa Resort & Spa** (Carlsbad, CA) helps guests achieve healthier guts by looking at dysfunctions in the digestive system and disturbances of the gut microbiome.

A term has taken hold for the cause of these issues: "leaky gut syndrome." The theory is that an altered or damaged bowel lining allows toxins, microbes, undigested food and even waste to leak into the body causing an immune system reaction that leads to some of these more serious health conditions.

Dr. Nicolai explains, "One of the biggest functions of the microbiome is the barrier it creates between the outside of the gut and the inside of the gut. When you have bad bacteria entering the gut, a kind of toxic invasion, it gets more and more damaged and leaky triggering the immune responses to spike."

The Crowd-Sourcing Collective

Learning about the microbes in our gut has become a community effort. Because, although many scientists, researchers and medical professionals believe that the microbiome has much to teach us, there is still a lot of work to be done to fully understand its impact. Which is why endeavors like American Gut and uBiome have formed to crowd-source this kind of knowledge. A uniquely modern-day approach, these companies are using direct-to-consumer marketing to get people to participate in DNA sequencing of their microbiome. The concept is that, for a donation of less than \$100, you can help build the first-ever database of information about the microbiome while also learning about your own gut's environment. It's as simple as taking a lifestyle survey and sending a sample swab. Participants benefit from being part of a scientific breakthrough that could become a very mainstream wellness practice.

THE BUSINESS AND SCIENCE OF THE GUT GROWS

Probiotics: To The Gut and Beyond

Promoting healthy bacteria in the body is becoming big business as the steady rise of probiotics products proves. The proliferation of probiotics is set to increase. In fact, Grand View Research reported in November 2014 that the global market for these good little bacteria is set to reach \$52 billion by 2020.

Probiotics are also being adopted in other wellness areas, including beauty and vaginal health. As long ago as 2009, the Journal of Clinical Microbiology reported on a bacteria that prevents acne and the American Academy of Dermatologists confirmed the same in 2014. Expect to see probiotics proliferating the beauty aisles in the not too distant future with claims that they can calm your skin just as they calm your gut. There are some first movers (e.g., Burt's Bees, Clinique, and Epicuren Discovery) on this already – companies that are adding Lactobacillus, a probiotic that is said to treat inflammation, to topical creams with a promise of reducing redness and soothing the skin.

You can find microbiomes in other parts of the body too – not just the gut. The vagina is also host to its own microbiome and there is exploration into how understanding it can take vaginal health to a new level by giving women tools to alter the make up of the microbes in their vagina – leading to less yeast infections but also promising to manage their reproductive health. One such company, Sweet Peach Probiotics, is already being discussed in the media.

Food and Diet Fads

What would a gut trend be without trendy foods to ingest? As microbes rise in importance expect fermented foods, like sauerkrauts, kimchi and yogurt, to be the new kale in your life. The process of fermentation is said to imbue our food with probiotics.

Expect to see a rise in diets that promise to heal our guts by removing perceived problematic foods, like gluten, difficult to digest grains, sugars and starches.



Clinique is among the first-movers that are adding Lactobacillus, a probiotic that is said to treat inflammation, to topical creams, with a promise of reducing redness and soothing the skin.

Spas around the world are designing programs around this exact concept. In fact, the FX Mayr Health Center in Austria has been advocating gut health for over 40 years and the its FX Mayr Cure has long promised to repair the damage done to the digestive tract, reducing vulnerability to illnesses and improving the immune system. In London, the five-star Corinthia hotel, home to ESPA Life, has partnered with the VIVA Mayr Clinic, the sister spa to the original, to offer the Mayr philosophy and regimes in the UK.

The UK's Grayshott Health Spa in Surrey offers a seven-day health regime based around the effectiveness of the digestive system with promises to improve cellular functioning, tissue healing and toxin removal. The program was designed by clinical nutritionist Stephanie Moore and natural therapy expert Dr. Elaine Williams, authors of "Gut Gastronomy: Revolutionise your Eating to Create Great Health." It includes eating nutrient-dense foods that don't stress the digestive system, alongside two days of intermittent fasting.

Canyon Ranch in the US conducts digestive tract analysis for its guests and is running a special program

in 2015 called "Gut Feelings: Gastrointestinal Health and Immune Function" to help people better understand gut health and how it relates to lifelong wellness. Also in the US, the Chopra Center at Omni La Costa Resort & Spa looks at dysfunction in the digestive system and disturbances of the gut microbiome.

The Future is Upon Us: Genetic Mapping

As we discover that the microbiome does much more than simply help us digest food and absorb nutrients, researchers are exploring their role in genetics and how altering the microbiome might allow us to alter our genes. Projects are underway – such as the NIH Human Microbiome Project – to use sequencing technology to analyze their genetic make up and discover the differences between microbes in a healthy versus diseased body. This research promises to lead to new ways to approach the treatment of diseases – including discovering diet and environmental alterations that can have a huge impact on our health.

It Might Be Mental Too

Just as the microbiome is being touted as the next big thing in combating physical diseases and ailments, it is also being carefully looked at when it comes to our mental health.

There are articles and studies in science and psychological journals (including Scientific American, American Psychological Association, Psychology Today and more) about gut bacteria's affect on the brain – it transmits neurochemicals that the brain uses to process things like learning, memory and mood. Of great interest is the fact that the microbiome produces about 95 percent of the body's supply of serotonin, the neurotransmitter that is often associated with mental disorders like depression. The thought in some mental health circles is that managing chronic gastrointestinal disorders through the microbiome could treat the anxiety and depression that often associated with these disorders.



The UK's **Grayshott Hall** offers a seven-day health regime based around the effectiveness of the digestive system. The program was designed by clinical nutritionist Stephanie Moore and natural therapy expert Dr. Elaine Williams, authors of "Gut Gastronomy: Revolutionise your Eating to Create Great Health."

THE FUTURE

With all this new information comes a much broader awareness of the impact of diet and environment on our health and wellbeing – something that the spa and wellness industry will greatly benefit from, thanks to a wide array of nutritional and diet expertise, as well as its natural focus on detoxification and cleansing.

Research proving how we can effectively change our gut's environment for the better is still in its infancy – but there's no denying the tantalizing possibilities of using diet, environment, and probiotics to combat much of what ails us – through our gut—and beyond!

1 "Bridging immunity and lipid metabolism by gut microbiota." Greer RL, Morgun A, Shulzhenko N. Oregon State University, Corvallis.

2 *Science Direct*, "The adoptive transfer of behavioral phenotype via the intestinal microbiota: experimental evidence and clinical implication." June 2013.

3 NIH Research, Sept 2013

10

Beyond the Stars

LUXURY REDEFINED

"For my part I know nothing with any certainty, but the sight of the stars makes me dream."

- VINCENT VAN GOGH



Beyond the Stars

Luxury Redefined



The Rock Spa at Fregate Island Private

THE TREND HIGHLIGHTS

- New hospitality ratings go beyond traditional star rankings as the only measure of quality. Online review sites and social media are upping the ante and creating new definitions of luxury.
- In the years ahead we will see more out-of-the-box spas, hotels, resorts and destinations, as wealthy and discriminating travelers demand experiences far beyond five star ratings.
- Opulent accommodations, award-winning cuisine and outstanding service are just the beginning. The new luxuries are solitude and space.
- “Less is more,” describes a new demand for experiences that are low in impact, high in comfort.
- An insatiable quest for new experiences and exotic locales are the Holy Grail for many travelers.

BACKGROUND

Some say it was an awestruck journalist, trying to convey the level of luxury offered by the newly opened Burj Al Arab hotel in Dubai in 1998, who first described it as a “seven-star” property. No such designation exists (or ever did), as none of the rating systems used by various governments and hospitality associations worldwide offers rating higher than five stars.

But with luxury re-imagined in post-recession leisure travel, we have seen an ever-increasing number of properties whose designs, locations, services and experiences defy superlatives sufficient to describe them. And for those luxe, over-the-top hotels, spas and wellness retreats, five stars just aren’t enough and traditional criteria used by the ratings organizations like accommodations, location, dining and service are possibly too limited now that more is at play.

Plus, the ubiquity of “star” assertions in marketing across industries, deserved and undeserved, has served to undermine once-revered distinctions. As the saying goes, if everything is highlighted, nothing is.

We predict a social shift that relies less on star rankings (albeit credible, and often audited data points) as the only measure of quality. Curated recommendations, reviews by astute travel editors and the proliferation of online consumer reviews on websites from Yelp to Trip Advisor

are creating new definitions of luxury. And with this shift, the luxury travel industry will be challenged to top itself with even more spectacular offerings and experiences. We see a future where five-star becomes the new baseline, as consumers redefine the stars in their eyes.

FUELING THE TREND

An appetite for what's different

Globalization has led to homogenized-cookie-cutter luxury but sophisticated consumers are eager to be surprised and wowed. In an article on Traveller.com.au ¹ Serge Diva, a marketer for cutting-edge hotels, notes that it is increasingly necessary to "quench the traveler's thirst for emotion with bigger, better curated experiences." Or as Hollywood power couple Baz Luhrmann and Catherine Martin ask in the same article, "Do we feel transported from our own reality?"

Extraordinary affluence

In 2014, there were a record-breaking 19 million millionaires in the world (a 19 percent jump over the prior year)² and the number of luxury consumers has more than tripled in under 20 years, to around 330 million people. Spending has risen at a similar rate, to an estimated €217 billion in 2013, according to Bain & Company's 2014 annual Global Luxury Study.³ And Credit Suisse's Global Wealth Report predicts that the number of millionaires worldwide is expected to increase by about 53 percent in the next five years, reaching 53.2 million in 2019.⁴

A shift from "having" to "being"

The Bain study also noted the "astounding" speed at which emerging luxury buyers switched away from "omnivorous consumption of status symbols" to spending on purchases like collectibles, entertainment--and vacations. According to the Boston Consulting Group study, experiential luxury now accounts for 55 percent of all luxury spending worldwide and is growing at 14 percent annually.

An increase in urban dwelling

Fifty-four percent of the world's population now lives in cities, where crowding and stress are commonplace

and, according to a report by the United Nations, China is expected to be 70 percent urbanized by 2050.⁵ Privacy and tranquility, space and light—room to spread your arms wide, breathe deeply, and see the sky—are more likely to be regarded as luxuries.

Demographic shifts

An aging population: The Boomers, says one marketing expert, have already bought their stuff. Now they want to spend on other things, like vacations. What's more, as consumers age, they begin to put a priority on fitness and wellness: luxury means being able to afford preventive as well as rehabilitative care.

Look at ME-Generation

Raised with a zeal for documenting #epic experiences "checking in" to enviable locales or humble-bragging photos in real time on Instagram – millennials are all about that perception. A 2013 study by Expedia and Egencia⁶ found that 40 percent of Millennials are likely to share a travel experience on social media during their trip, and 34 percent on their return, making exceptional service even more important. According to the same survey they spend more on travel more than older generations, embracing luxury travel experiences. African safaris and over-water bungalows in Polynesia, once bucket-list experiences, are now playgrounds for twenty-something honeymooners.

Celeb-Worthy

Opulence permeates through new TV realities like 'Rich Kids of Beverly Hills', 'The Bachelorette' and the Kardashians show-and-telling their exotic 'reprieves,' making that younger demographic easier to reach, but harder to wow. Plus, tabloid coverage of British royals' Seychelles honeymoon and movie star Jennifer Anniston's home-away-from-home Las Ventanas in Los Cabos, lends cachet.



ComoShambhala



Cheval Blanc Randheli



ASPECTS OF THE TREND

The Ante is Upped and Luxury is Redefined

Luxurious accommodations, superb locations, unusual and varied treatments, fine dining, and other outstanding services, qualifies these properties below for mention, and many are already designated five-star. But we've singled them out as examples of what we forecast as a hot trend in years ahead: out-of-the-box luxury and experiences for an industry that keeps raising the bar. Some are recognized for extravagance and service, others for majestic exclusivity and once-in-a-lifetime wellness offerings...and beyond.

You're the majesty: opulence

If you want to experience royal treatment, why not stay in a palace? Though the seven-suite boutique Antara Palace Wellness and Destination Spa in Cyprus may never have housed a crowned head, it certainly looks the part—unapologetically posh, with a marble-sculpture-filled atrium and ballroom, walls covered in frescos and silk, and 32kg of gold leafing that makes the place shine. To feel like a potentate, you can book the entire 43,000-square-foot property—suites, spa, restaurants and private

cinema—exclusively for you and your retinue. The Aman Grande Canal Venice, where Hollywood royalty George Clooney recently wed, is the real McCoy: an actual palace-turned-luxury-property. What's very special are the generously sized guest rooms and spectacular private gardens—both rare in Venice; the public rooms with views of the canals that defy description; and a superb staff that manages to make guests feel at home in this regal residence. On the walls of the 100-year-old Viceregal Palace at the Ananda Resort in the Himalayas are photos of heads of state that were guests of the Maharajah who once lived here. The most impressive accommodation is the enormous Palace Suite with private terrace and Jacuzzi, accessed by a private elevator that also ascends to the private rooftop dining room.

All about you: service

To warrant theoretical extra stars, a property will hyper-personalize guests' experiences, not only meeting their desires but also anticipating them. Burj Al Arab Jumeirah set a new standard by assigning a private butler to each guest. Though today other properties do the same, this Dubai resort keeps its edge by offering such thoughtful touches as allowing

in-suite check-in with your butler rather than at a lobby desk and by keeping its staff-to-suite ratio at eight to one. At the Iniala Beach House, Phuket, Thailand in addition to a butler you have a private trainer, a chef, and a driver and invited to put together program you desire – an entire week of cooking lessons, say, or martial art practice. The San Diego, CA Grand Hotel Del Mar keeps a subtle watch on your needs. Leave phone and iPad chargers plugged in and dangling you may find the cords bundled and ribbon-tied when you return. A new tube of toothpaste appears if your current one is near empty, a cleaning cloth if eyeglass are spotted on your nightstand. And no nickel-and-diming: you get free Wi-Fi, bottled water, newspapers, shoe shines, classes, even chauffeured transportation within fourteen miles. The Six Senses MontBlanc in the French Alps (to open in 2015) will make skier guests feel special in a unique way: giving them first access to untouched morning powder.

The un-urban experience: solitude and space

Marlon Brando described his French Polynesian island home, now The Brando luxury resort, as “elemental. You have the sky, the sea, the trees, the crabs, the fish, the sun... the basics.” Such “basics” – air, light, breathing room—are what five-star-plus properties often offer in abundance. One selling point at the Brando is privacy: a private villa (with a private dining room and yard, a spa session in a private, tree-hung

suite, private chats with scientists exploring the onsite marine mammal sanctuary. Amenoi in Vietnam is inside Nui Chua National Park, a 100-acre oasis offering wide-open spaces, villas far apart, a quiet lake abutting the spa, and views so open and spectacular that just gazing on them has a soothing effect. You’re asked to shed your footwear when you arrive at Thailand’s InterContinental Samui Baan Taling Ngam Resort to begin your “no shoes, no news” experience, much of it outdoors and facing skyward (open-air restaurants, garden bathrooms where you can watch the full moon while you shower, an observatory with telescopes for star-spotting).

No place like home: exotic locales

Experiential novelty is the Holy Grail for many luxury travelers, and the trend for hotels and wellness retreats that are exceptional is to deliver what they want and more—the chance to do good while living well. The Four Seasons Tented Camp, Golden Triangle, Thailand offers luxury tented accommodations (featuring stunning views and two-person copper bathtubs), and is working to preserve a tradition of in-captivity elephants living with their mahouts (owners). Your visit helps supports the efforts, and in return you can wash, feed and/or ride the majestic animals—and there’s a special spa treatment if the latter tires your muscles. At the Cheval Blanc Randheli, Noonu Atoll, Northwest Maldives, a biologist and video expert (associated



Marlon Brando described his French Polynesian island home, now **The Brando** luxury resort, as “elemental. “Basics”—air, light, breathing room and privacy—are what five-star-plus properties often offer in abundance.



At **Fregate Island Resort**, Seychelles, guests can be a modern-day Darwin, roaming amid flocks of tropical birds and giant tortoises lumbering among the lush grasses, knowing meanwhile that the hotel is funding the regeneration of the island's ecosystem.

with a manta conservation charity) prepare you for a dive to find and photograph a manta ray. Should you discover a new type, you have the chance to name it. At Fregate Island Resort, Seychelles, you're a modern-day Darwin, roaming amid flocks of tropical birds and giant tortoises lumbering among the lush grasses, knowing solar-powdered buggy exploring the woodlands, knowing meanwhile that the hotel's coffers fund the regeneration of the island's ecosystem. As easily as if on a game drive, you can spot animals while seated on the raised balcony of one of the futuristic, luxurious tented suites at Richard Branson's Mahali Mzuri. It's part of a conservancy that protects land in the Masai Mara National Reserve for animal inhabitants—land that might otherwise have been sold for industrial or farming purposes.

Where less is more: simplicity

To paraphrase Dolly Parton ("You need a lot of money to look this cheap"), and it takes a lot of care to look simultaneously luxurious and minimal. Cambodia retreat Soong Saa manages to be low in impact though high in comfort, focused on the notion of "luxury that treads lightly." For example, in line with its sustainable ethos, wood from old fishing boats and driftwood are fashioned into elegant furniture and tree trunks into outdoor showers for its eco-villas, and builders used salvaged railway boards in constructing the reception area. Fivelements Puri Ahimsa Healing Center in Indonesia is a similarly understated retreat located along the Ayung River, gorgeously constructed entirely of bamboo and offering raw vegan cuisine for health, beauty and longevity and sacred arts practices for inner strength, alignment and dedication. And while the accommodations at Vana Malsi Estate are simple by today's luxury design standards, the opportunity to be immersed in a true wellness experience (complete with 150 therapies, 55 treatment suites, with top integrative and alternative healers from all cultures) is considered a true luxury. Under the direction of famed Chef Kuntal Kumar, Vana offers guests two menus: salana, inspired by a variety of cuisines and based on wellness principles, and añayu, which combines Indian cuisine with Ayurvedic principles.

The accommodations at **Vana Malsi Estate** are deceptively simple by today's luxury design standards but Vana offer a different kind of luxury: the opportunity to be immersed in a true wellness experience led by top integrative and alternative healers from all cultures.





Pushing against time: renewal and inventive wellness

Wellness retreats offer rejuvenating and prophylactic programs, but some are rising above the rest thanks not only to more and better treatments but also a focus on long-term, transformative results. The iconic Golden Door in California added new stars to its constellation when it underwent a significant makeover to restore the spa to its full glory. The famous luxury spa now encompasses more than 600 acres, more than double its original size, and the property's substantial agricultural area is devoted to holistic organic farming.⁷ And the Golden Door does more than help you eat well, exercise hard, and focus on health while you're a guest. Personalized nutritional sessions continue eight weeks after a guest's stay, and can be tailored to individuals needs from gluten-free to weight management at home. Consultations via phone, text, Skype or email include nutritional tracking, recipe modification, and shopping tips. The Royal Monceau in Paris offers urban spa-goers a huge lap pool, color therapy in their wet areas and "My Blend" a Clarins concept, creating skincare based on a client's skin biological age (following detailed analysis). The new Villa Stéphanie spa, adjacent to the famed Brenners Park-Hotel & Spa in Baden-Baden, is slated to open in January 2015. Set in a lush private park, the spa will encompass the entire five floors of the historic villa and include a 500-square-metre sauna, plunge pool, private gym, a hamam and treatment rooms over looking the gardens. Haus Julius, a mansion designed to offer exclusive medical care to Brenners' guests is directly connected to the new spa. And the spa at Mukul Beach in Nicaragua's Emerald Coast offers guests a completely private spa experience from three hours to full day. Their six separate spa buildings are connected to the dramatic natural coastal setting and themed, among them, a Healing Hut, Crystal Temple and Rain Forest, with an

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array of matching treatments. For anyone looking to recharge, the signature Thalassotherapy treatment at the latter includes a seawater pool immersion, marine body masque application, radiance facial followed by Vichy waterfall shower, culminating with a lymphatic drainage massage, for general health and complexion.

THE FUTURE

Whenever it seems that the limits of spectacular have been reached, another spa, hotel or wellness retreat will set the bar higher. Inspired by discriminating travelers immersed in a digital world, with an appetite for more and better, spa entrepreneurs and their architects, aestheticians, and other creative collaborators will continue to dazzle us with properties deserving of six and seven stars, and great prestige. Perhaps the future will present something extra-terrestrial – literally out of this world.

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- 1 Traveller.com.au, "Dream Merchants: The Future of Hotels Has Arrived," July 2014.
 - 2 Boston Consulting Group, BCG Perspectives: "Global Wealth Report," June 2014.
 - 3 Bain & Company, "2014 Annual Global Luxury Study," October 2014.
 - 4 Credit Suisse Research Institute, "Global Wealth Report," October 2014.
 - 5 United Nations Report, "2007 Revision of World Urbanization Prospects," 2008.
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 - 7 *The San Diego Union Tribune*, "Golden Door Getting Makeover," April 3, 2014.

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