

# THE AMERICAS: CANADA

## 1. What is the latest spa and wellness news in your country?

The Canadian economy has performed solidly for the past several years, providing some liquidity for households and an increase in spa visits domestically. Further, there is a vibrant market in spa visits within the \$81.9 billion Canadian tourism industry. Estimations of the total spa market size and growth have been hindered because of a lack of formal research on the sector, the last focused report having been released back in 2006. The last published estimate stated that Canada has roughly 2,300 spa businesses and the sector is growing 17 percent per annum.

The continued integration of workplace wellness programs is a current newsmaker. In a recent survey, 97 percent of Canadian companies agreed that employee health is directly related to corporate success — a strong case for workplace wellness programs. Recent research by the Conference Board of Canada shows that employee absenteeism is at its highest level in 20 years, averaging about 6-7 days a year per employee. In an organization with 500 employees, this number can average about 3330 absent days per year, equivalent to paying wages for nine employees per year who did not show up for work at all. On a national average, absenteeism is costing Canadians an estimated \$7.4 billion dollars a year in lost wages. A global survey of health promotion and workplace wellness strategies research, which surveyed more than 1,000 employers in 37 countries, found that 65 percent of respondents believe that wellbeing programmes are extremely or very important to attract and retain employees. Continued integration of wellness services as part of a larger employee benefits package is widely acknowledged to provide a stronger foundation for employee health and to stem the tide of workplace absenteeism. Doing its part, the Noel Asmar Group of BC, Canada, has offered employee wellness programs centered on nutrition and fitness, with a trainer paid to come in twice a week to exercise with the employees. “Mental and physical wellbeing are critical to a healthy workplace,” states CEO Noel Asmar.

## 2. The industry is buzzing about wellness technologies. How do you see spa and wellness establishments in your country using wellness technologies now and in the future?

Canadian spa and wellness establishments, along with the general public, have been early adopters of wellness technologies.

Examples:

**Personalization (apps, devices):** Wellness apps and wearable devices are quickly being absorbed into the culture of Canada, with apps to monitor sodium intake, daily fitness routines and eating habits. For instance, a Canadian site called sodium101.ca offers an app for iPhone and iPad that tells you how much sodium is in foods and tracks your consumption. Also of note, Canadian company ResortSuite offers software for running a spa including a personalization module that tracks your clients' preferences, offering a one-to-one experience between the spa and the client.

**New therapies:** We see the melding together of wellness treatments with both medical and non-medical, non-invasive treatments, particularly for weight loss, skin abnormalities (skin tags, varicose veins) and detox. A leading Canadian company Eminence, for example, is addressing many aging and sun-related issues of the skin.

**Spa treatments:** Canada offers the same cutting-edge treatments as the rest of the world, including hot stone therapy, lymphatic drainage massage and Thalgo.

**New products:** These range from skincare products (lotions/creams) to new equipment (massage chairs, pedicure stations) to high-tech evaluations (ultrasound body fat and muscle analyzers).

### **3. When it comes to wellness tourism, what is happening in your country?**

There is a marked increase in tourism in Canada, and per past reports, that tourism creates ancillary demand for spa and wellness services. Canada competes for global tourism dollars and must keep up with the amenities that global travellers demand. Canadian tourism continues to be dominated by domestic visitors, but with solid increases in international visitors. Canada offers world-class resorts and wellness facilities which are anchored by recreation and scenery. Tourism in Canada is a mix of breathtaking coastlines, unspoiled inland lakes, forests and mountains, and a booming aboriginal tourism industry including Native American tours and casino entertainment, with all sectors who wish to remain relevant adding wellness to their packages. A recent study put the global wellness tourism market at two trillion dollars with \$60 billion of that coming from spa, fitness and outdoor recreation. These figures are also quite recent, considering that wellness tourism in its current form didn't exist a decade ago. Canada stays competitive with this trend by anchor-

ing wellness to the gifts of nature within its borders. Hiking retreats, luxury ranches, hot springs retreats, back-country fishing, all with a spa/wellness component, make Canada a tough competitor in wellness tourism.

To support the growth of wellness tourism, Canada has multiple trade-shows per year, most notably Esthetique Spa International, with multiple regional shows and two national shows.

#### **4. Please provide one sentence that best describes the latest developments in your country for each of these categories:**

**Hotel spas:** The continued penetration of spa amenities in Canadian hotels is incredible, with spas services now showing up in every type of lodging from budget accommodations to luxury ranches.

**Destination spas:** Canada's vibrant cityscapes and beautiful topography continue to make it a favorite wellness travel destination for both domestic and international visitors, offering all manner of spa, wellness and fitness services, a great example being Ste. Anne's Spa in Ontario, which has been voted Favourite Spa in Canada for eight consecutive years by SpaFinder Readers' Choice.

**Hot springs spas:** Canada has been a historical destination for hot springs therapy, with world-class natural hot springs like Banff, Harrison and Fairmont, but lately the incorporation of first-rate lodging and spa treatments has made these destinations even more popular.

**Wellness living communities:** In keeping with Canada's constant eye on a high quality of living, the province of Alberta has created a handbook for all provincial communities that addresses every aspect of wellness from standard issues such as fitness and mental well-being to underlying causes of community disharmony such as food safety, social support, early childhood development and housing.

**Corporate or employee wellness programs:** Recognizing that 62 percent of Canadians are overweight, and that its population is often overworked and stressed, Canada is now on the leading edge of employee wellness with programs that have reduced the average Canadian work-week to under 40 hours. The proof of wellness program investment can be measured financially; the Canadian government's corporate wellness programs reportedly returned \$1.95-\$3.75 in value per employee per dollar spent.

## **5. Fast-forward five years and tell us what you think the spa and wellness industry in your country will look like.**

Within the context of a strong Canadian economy buoyed by its significant mineral wealth, we anticipate the spa and wellness industry will continue to maintain a strong growth trajectory. Also, the stringent licensing requirements to work in fields of massage and cosmetology mean that this workforce will be well qualified to perform services. However, demand will, for now, likely outpace the supply of qualified workers. For wellness tourism, Canada's scenery, safety and stability will continue to make it a favorable tourist destination, opening a window for more global visitors to see the country, with a percentage of them attaching a spa/wellness visit onto their trip. Anchored by a large amount of unspoiled wilderness, Canada will continue to draw visitors seeking to escape the hectic pace of city living. Attached to all these recreation and scenic tourist locations will be opportunities to offer wellness services to visitors. We see that for spas to be competitive in this new arena, they will have to offer a broad-based set of services from traditional treatments like massage to advanced clinical services (in concert with certified medical providers) such as Botox, weight-loss and non-invasive rejuvenation procedures. For domestic spa visits, according to ISPA research, Canadian spa visitors are price-sensitive to spa services, favor massage treatments, and the leading motivator for a spa visit is stress-relief. Canada's increased prosperity should help to loosen this price sensitivity and the industry should continue to educate the average stressed-out North American employee to take in more treatments from Canadian spas .

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