

THE AMERICAS: UNITED STATES

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

We can easily point to a number of issues around spa and wellness making news this year in the United States. Certain emerging trends are showing strength these days, including: wearable technologies that track performance and metabolics; a growing acceptance of certain medical approaches and therapies in a spa setting; corporate wellness programs; an explosion in wellness tourism marketing; an increased focus on healthy eating and sustainable living, and customized wellness with programs such as Vera Via, which operates out of The Park Hyatt.

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?

We have not yet really begun to see the in-spa applications of wellness technologies beyond enhanced appointment scheduling software, the use of iPads in treatment rooms to help therapists explain products to clients and, of course, adapted medical technology that uses light and laser or other pulses for beauty treatments. But a time will soon come when we will use wrist or ankle bands to give deeper metabolic readouts than are commonly available now. Even the use of Google Glass will become common in some fitness practices. Personal fitness apps are proliferating all over the world to help health-minded individuals stay on track. While they may not feed directly into onsite treatments, they will certainly help put spa-oriented thinking into the minds of more people, many of whom may not have considered visiting a spa. Meanwhile, the US is such a wired-up environment at all hours of the day that spas are now promoting themselves as technology-free zones in which to unplug and reboot.

3. What is happening in your country in terms of wellness tourism?

Wellness tourism has become a \$438.6 billion global market. The USA remains well positioned for growth given the new emphasis on spas in various areas of tourism.

In the meetings and incentives market we see growing interest in “spa meetings” that give employees bond-worthy downtime. The MGM Grand in Las Vegas is partnering with Delos wellness environments to show just how healthy and energizing large meetings and conferences can be. MGM already offers “wellness rooms.” In a city whose tourism numbers top 40 million a year, wellness environments are clearly a thing of the future, and are already in demand as a tourism commodity.

We are also seeing a greater focus on spa and wellness travel among travel agents who embrace this industry as a niche. Travel Market Report, the online travel industry wire-service — part of the TravelSavers network of global independent travel agencies — offers spa and wellness as one of eight niche vertical categories covered by its dedicated staff journalists. Selling spa and wellness travel is now a regular topic for panel discussions at travel agent conferences like the annual Los Angeles Times Travel Show.

Studies released last year by SRI International, an industry research firm, show that 525 million trips were made by wellness travelers in 2013, and while these numbers represented only six percent of all tourism trips, they accounted for 14 percent of all tourism spending. We also know that wellness travelers tend to be wealthier and more highly educated than other travelers, and that they spend more per trip on average. For example, where an international tourist will spend, on average, \$1,000 per trip (not including air travel), an international wellness tourist spends 65 percent more. The differential between an average domestic traveler in the USA and a wellness traveler is even greater, with the wellness travelers spending 2.5 times what the average domestic tourist spends per trip.

These findings put pressure on the supply side to increase hotels’ interest in adding a spa or wellness component, or spicing up the spa they already have with more interesting offerings that can often prove to be attractions or magnets in their own right. Hotels are able to package these offerings or stir up interest through social media and attract guests — often high paying guests — who might have slipped through the cracks.

And we are seeing well-known international business hotel chains, such as InterContinental Hotel Group, get into the wellness lifestyle line with the debut this summer of EVEN Hotels, created to help wellness-minded travelers keep their balance while on the road, with components that include eating well, resting easy, keeping active and accomplishing more.

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

Hotel Spas: A split approach: these are either going over the top into unusual, new-fangled and fashionable offerings, or heading back to basics.

Destination Spas: Emphasis is on technological, scientific, medical, sometimes gimmicky approaches to attract the stressed-out, unfit guest who has more money than time and wants to put quick fixes on chronic problems. There are also more customized services, such as cholesterol checks, at The Ranch at Live Oak Malibu, both before the programs and after, often with dramatic results.

Hot Springs Spas: These are usually located in more rural areas and do not possess the pizzazz we expect, so smart spas in this sector are either sprucing up their real estate or banding with other area hot springs spas for marketing power and a magnified presence on the wellness map.

Medical Spas: We are finding that savvy doctors and medical therapists in the US are teaming up with day spas, hotels and resorts to offer serious cosmetic treatments to guests in the context of a wellness vacation.

Wellness Living Communities: The demand here is mostly among younger people; we are seeing colleges and universities around the country answer their call with LiveWell dorms and micro residential communities for students.

Corporate Wellness Programs: Companies with worksite wellness programs have seen an eight percent boost in productivity. With the Affordable Care Act increasing allowances for such programs, we now expect to see an increase in corporate wellness programs in the workplace.

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

With personal technology on the upswing, it's likely that in future many clients will be wearing or seeking smart clothing that will measure their performance during work-outs or training sessions. They will want professional advice on what apps to use in daily life and how to use them effectively.

With med-spa approaches becoming more mainstream, we will see many more proce-

dures once performed only in medical offices crossing over into the leisure spa space. Conversely, expect to see the medical field embrace casual wellness offerings more robustly as hospitals begin to add a spa component.

With economic as well as generational downshifts, spa may tilt from individual to group activity — a place for social wellbeing and group bonding as much as physical wellbeing — and thus facilities will reach out to groups in the Gen Y and Gen X demographics to offer value that might not be available for individuals.

Luxury hotels will become increasingly more vested in offering wellness-intensive experiences that border on medi-cosmetic treatments. This kind of option is already well under way at hotels outside of the USA, especially in Asia and Mexico, and we expect that demand will clear the way for more such spas, and that accessible cosmetic medical treatments will find their way into the mainstream US hospitality sector.

We will also see an increased proliferation of Spa Envy-type businesses and street-corner massage salons to bifurcate the spa concept so that spa and wellness will mean much more than massage. Meanwhile, there will still be a place for budget massage seekers to go, possibly bringing more people into an activity and consciousness that was once out of reach and, at the same time, clearing the way for day spas to truly differentiate themselves from street and strip mall businesses.

Finally, sustainable spas or eco spas will become more of a force. From organic products and potions to farm-to-table approaches in the whole spa experience, spas will truly take on the mantle of peaceful health (if not detoxification) hubs and dig in with increasing importance as must-have venues in cities, towns and communities across the country.

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