



# FUTURE SPA & WELLNESS...

We • Work • Well

Lisa M. Starr Wynne Business

# Where We Were: Global Spa Market 2019

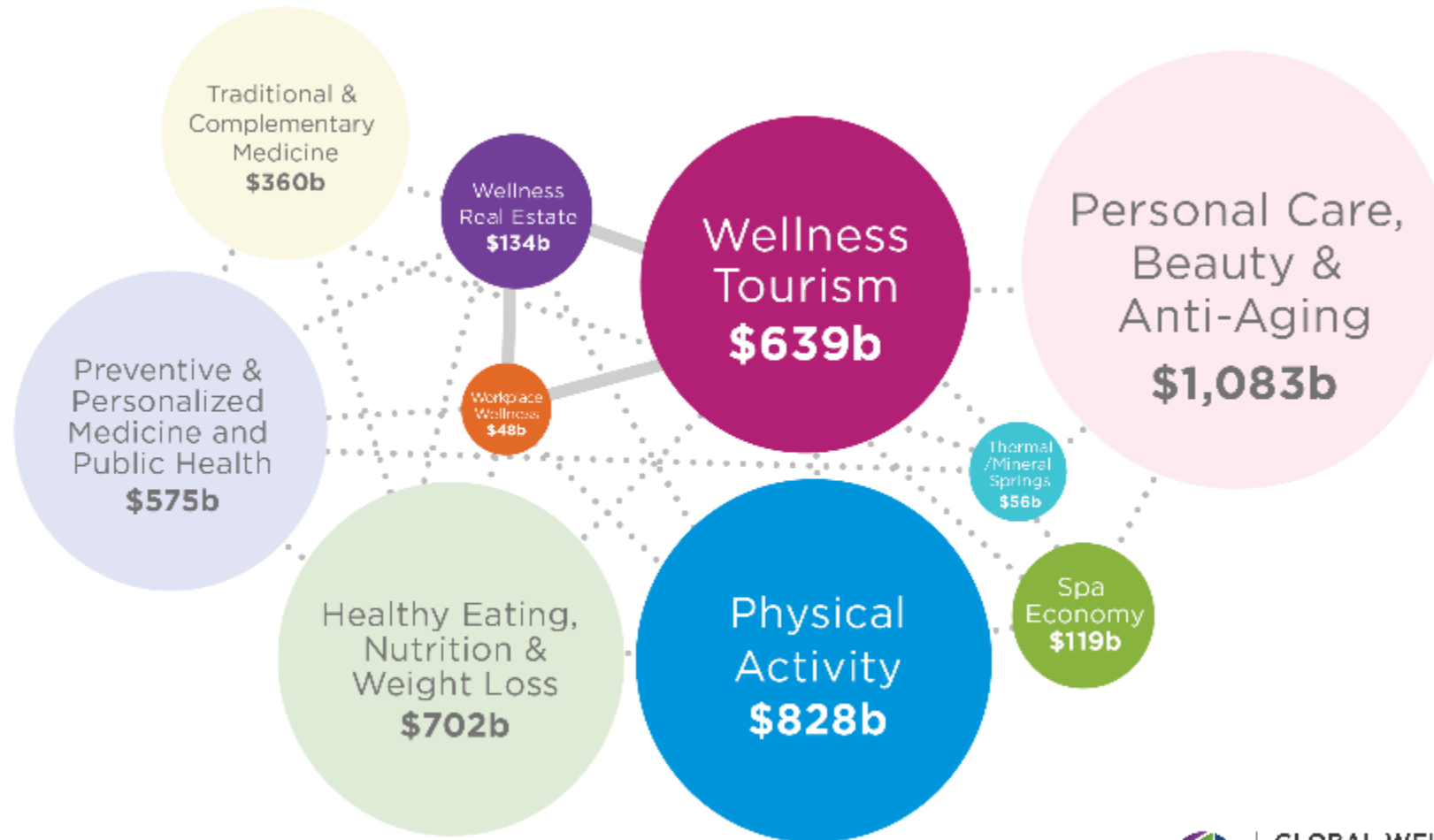
- ▶ Approximately 149k spas worldwide
- ▶ Revenues of \$US93b
- ▶ Global Employment 2.6 million
- ▶ Growth of 9.9%/yr since 2014

*2018 data courtesy GWI*



*Four Seasons Dubai*

# GLOBAL WELLNESS ECONOMY: \$4.5 Trillion Market



Numbers do not sum to total due to overlap in segments.



**GLOBAL WELLNESS  
INSTITUTE™**  
EMPOWERING WELLNESS WORLDWIDE

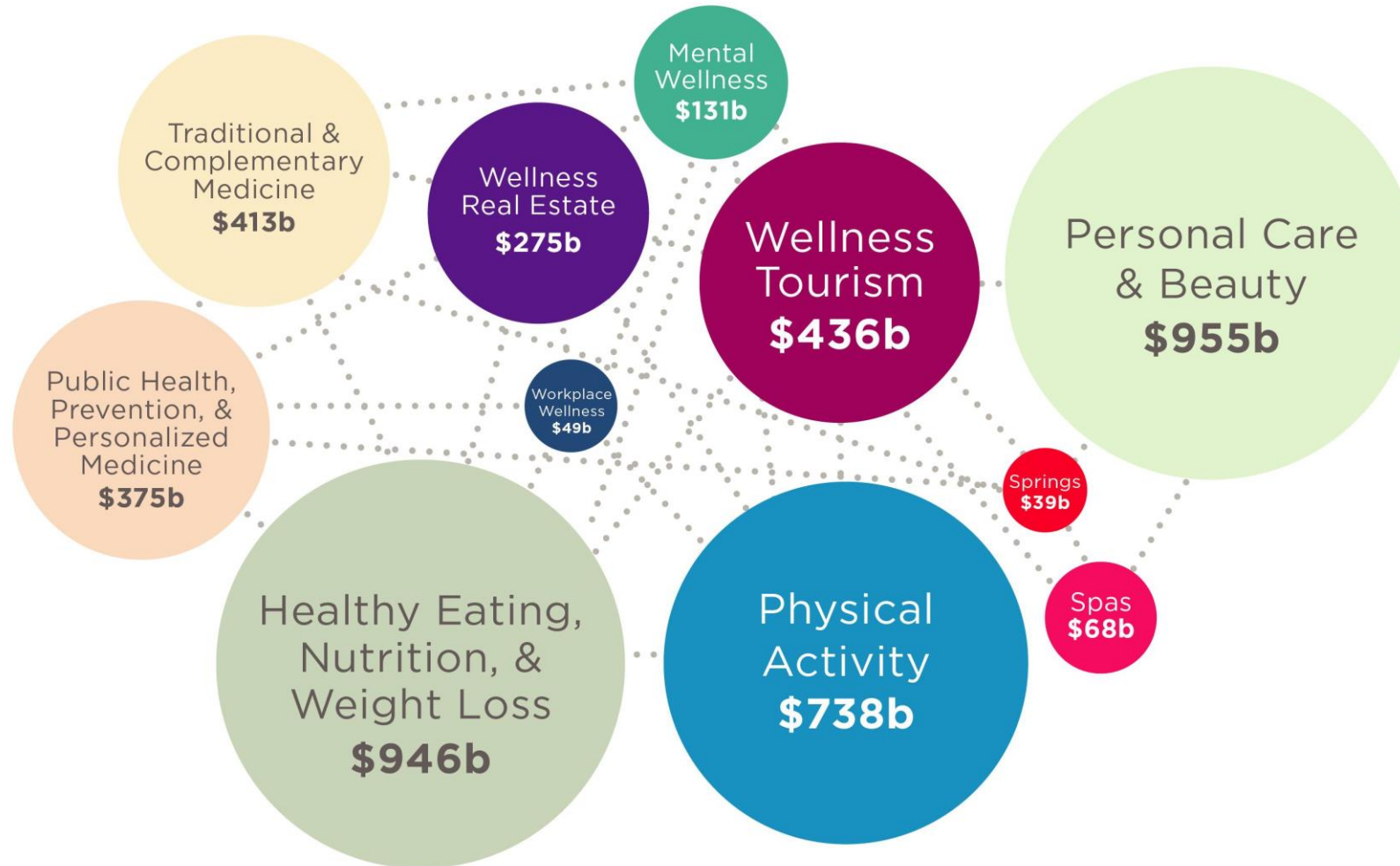


# Where we are: Re-Thinking Spa

*“Places devoted to enhancing overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit.”*



# GLOBAL WELLNESS ECONOMY: \$4.4 trillion in 2020



Note: Numbers do not add to total due to overlap in sectors.  
Source: Global Wellness Institute



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## Wellness Economy Sectors, 2017, 2019, 2020

	Wellness Economy (US\$ billions)			Average Annual Growth Rate	
	2017*	2019	2020	2017-2019	2019-2020
Personal Care & Beauty	\$1,021.6	\$1,097.3	\$955.2	3.6%	-13.0%
Healthy Eating, Nutrition, & Weight Loss	\$858.1	\$912.3	\$945.5	3.1%	3.6%
Physical Activity	\$789.5	\$873.8	\$738.1	5.2%	-15.5%
Wellness Tourism	\$617.0	\$720.4	\$435.7	8.1%	-39.5%
Traditional & Complementary Medicine	\$376.2	\$431.9	\$412.7	7.1%	-4.5%
Public Health, Prevention, & Personalized Medicine	\$328.3	\$359.1	\$375.4	4.6%	4.5%
Wellness Real Estate	\$148.5	\$225.2	\$275.1	23.2%	22.1%
Mental Wellness	N/A	\$122.3	\$131.2	N/A	7.2%
Spas	\$93.6	\$110.7	\$68.0	8.7%	-38.6%
Workplace Wellness	\$47.7	\$52.2	\$48.5	4.6%	-7.0%
Thermal/Mineral Springs	\$56.1	\$64.0	\$39.1	6.8%	-38.9%
<b>Wellness Economy</b>	<b>\$4,317.3</b>	<b>\$4,909.9</b>	<b>\$4,369.3</b>	<b>6.6%</b>	<b>-11.0%</b>

\* 2017 figures have been revised since GWI released the previous version of the Wellness Economy Monitor.

Note: Figures do not sum to total due to overlap in sectors.

Source: Global Wellness Institute, based on extensive primary research and secondary data sources.



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BUSINESS / BUSINESS FEATURES

## COVID-19 Amplifies Demand for Clean Beauty, Wellness Products

Consumers increasingly care about what goes inside and outside their bodies.

By WWD Studios on July 13, 2020

## Three Reasons Why The Wellness Industry Presents Big Opportunity For Investors

Forbes  
Finance  
Council



How COVID-19 has sparked a 'new normal' in the health and wellness industry

Natural Products Insider

## How might Covid-19 shape interest in health-and-wellness?

just  
food

MINTEL BLOG » COVID-19 » The 'next normal' of COVID-19 amplifies basic wellness needs

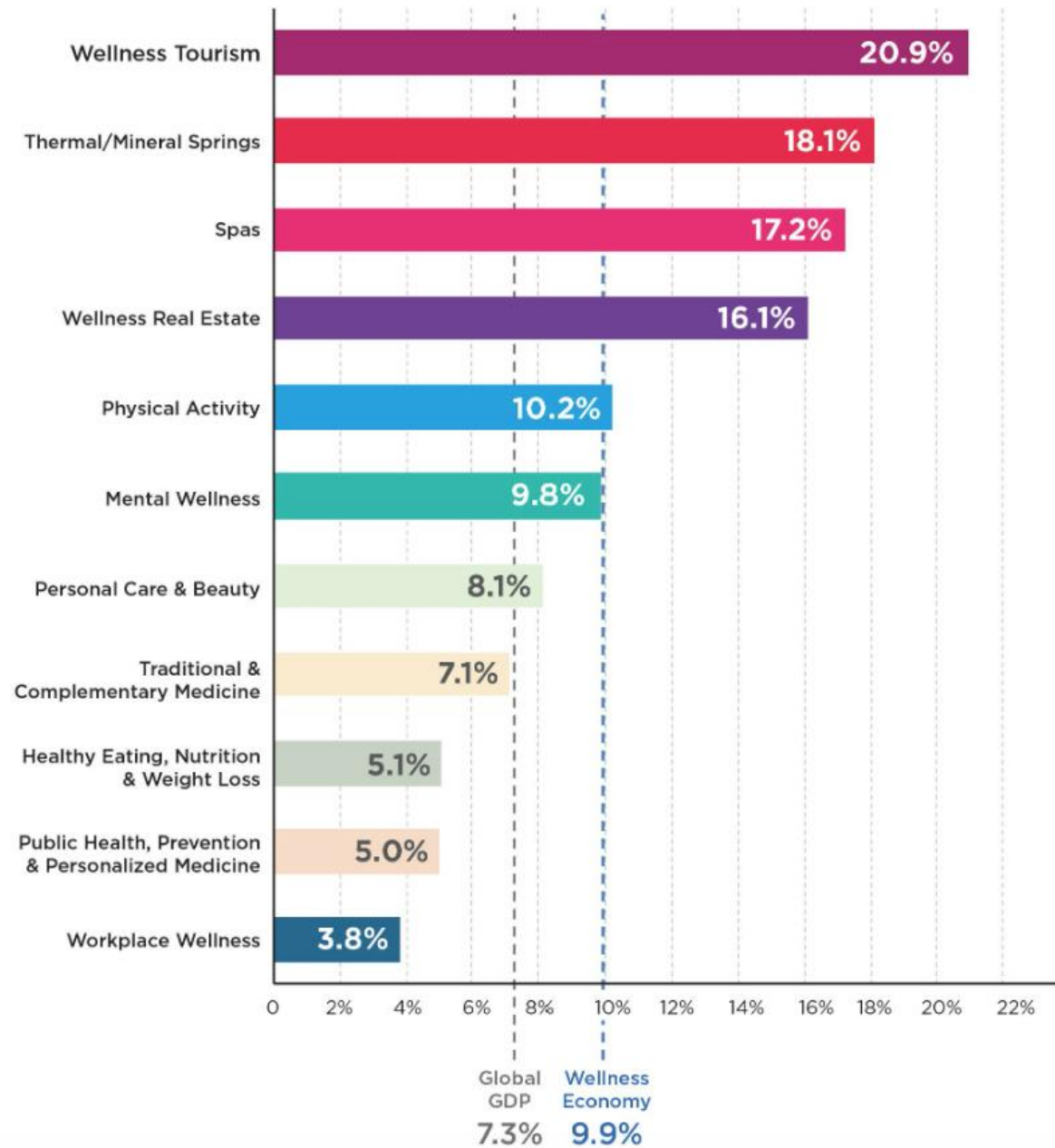
THE 'NEXT NORMAL' OF COVID-19  
AMPLIFIES BASIC WELLNESS NEEDS



Why The Wellness Economy Is Ripe For Investments



## Projected Average Annual Growth Rate by Sector, 2020-2025



# Wellness Economy Growth Projections by Sector, 2020-2025

	Market Size (US\$ billions)		Projected Market Size (US\$ billions)					Projected Average Annual Growth Rate
	2019	2020	2021	2022	2023	2024	2025	2020- 2025
Personal Care & Beauty	<b>\$1,097.3</b>	<b>\$955.2</b>	\$1,093.5	\$1,208.5	\$1,282.6	\$1,349.3	\$1,412.9	<b>8.1%</b>
Healthy Eating, Nutrition, & Weight Loss	<b>\$912.3</b>	<b>\$945.5</b>	\$986.3	\$1,035.8	\$1,089.2	\$1,147.2	\$1,209.9	<b>5.1%</b>
Physical Activity	<b>\$873.8</b>	<b>\$738.1</b>	\$828.0	\$907.7	\$999.9	\$1,094.5	\$1,198.8	<b>10.2%</b>
Wellness Tourism	<b>\$720.4</b>	<b>\$435.7</b>	\$652.8	\$816.5	\$928.2	\$1,030.6	\$1,127.6	<b>20.9%</b>
Traditional & Complementary Medicine	<b>\$431.9</b>	<b>\$412.7</b>	\$448.4	\$480.0	\$512.6	\$546.5	\$582.6	<b>7.1%</b>
Public Health, Prevention, & Personalized Medicine	<b>\$359.1</b>	<b>\$375.4</b>	\$394.5	\$412.4	\$429.7	\$453.3	\$478.3	<b>5.0%</b>
Wellness Real Estate	<b>\$225.2</b>	<b>\$275.1</b>	\$347.1	\$398.4	\$459.7	\$516.9	\$580.3	<b>16.1%</b>
Mental Wellness	<b>\$122.3</b>	<b>\$131.2</b>	\$147.5	\$163.4	\$180.1	\$195.5	\$209.8	<b>9.8%</b>
Spas	<b>\$110.7</b>	<b>\$68.0</b>	\$101.9	\$122.3	\$131.5	\$140.7	\$150.5	<b>17.2%</b>
Workplace Wellness	<b>\$52.2</b>	<b>\$48.5</b>	\$50.8	\$52.8	\$54.5	\$56.4	\$58.4	<b>3.8%</b>
Thermal/Mineral Springs	<b>\$64.0</b>	<b>\$39.1</b>	\$58.5	\$71.5	\$77.4	\$83.3	\$89.7	<b>18.1%</b>
<b>Wellness Economy</b>	<b>\$4,909.9</b>	<b>\$4,369.3</b>	<b>\$5,040.2</b>	<b>\$5,588.7</b>	<b>\$6,055.1</b>	<b>\$6,514.9</b>	<b>\$6,992.0</b>	<b>9.9%</b>

*Note: Figures do not sum to total due to overlap in sectors.  
Source: Global Wellness Institute estimates, based upon  
economic and industry sector projections from the IMF,  
ILO, Euromonitor, and GWI's data and projection model.*



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# Mindbody Wellness Index 2021



## Top three wellness services



**IV therapy**  
(up 50%)



**Red light therapy**  
(up 50%)



**Massage**  
(up 37%)

## Top three beauty services



**Manicure/pedicure**  
(up 50%)



**Eyebrow waxing/  
threading**  
(up 50%)



**BOTOX®/fillers**  
(up 37%)

# Post-Pandemic Challenges







- ▶ Staffing Challenges
  - Quantity
  - Quality
  - Retention
- ▶ Guest Amenities
  - Thermal Areas
  - Food & Beverage
  - Common Use Products
- ▶ Supply Chain Issues
- ▶ Vaccine Mandates
- ▶ Time Management



# Focus on Built Environments





- ▶ Natural Elements & Building Materials
- ▶ Effective Air Circulation
- ▶ Easily Sanitized Finishes & Surfaces
- ▶ Fresh Air & Outdoor Spaces
- ▶ Roomy and/or Multiple Lounges
- ▶ Sustainability
- ▶ Incorporation of Light Therapy and Technology







# Living Elements

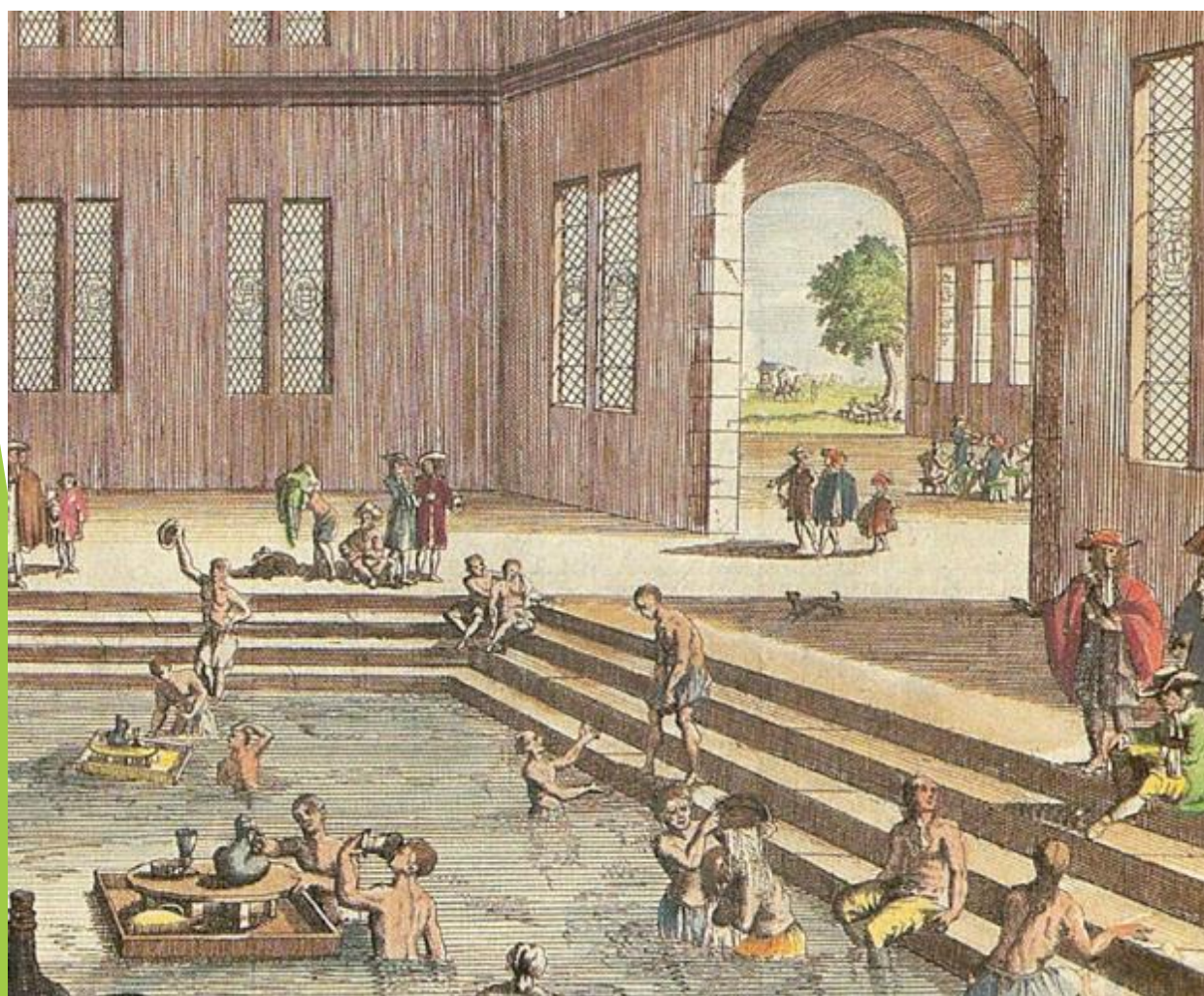


# Younger Consumers





# Communal Treatments







# New Style Facials







# Walk-Up Treatments

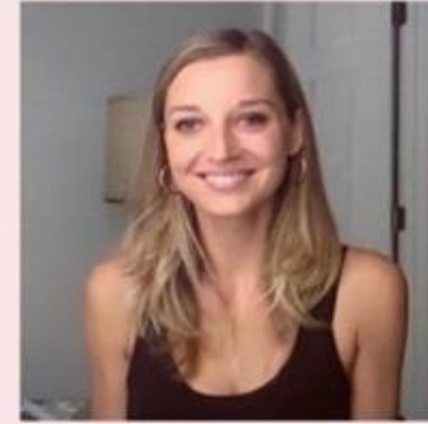
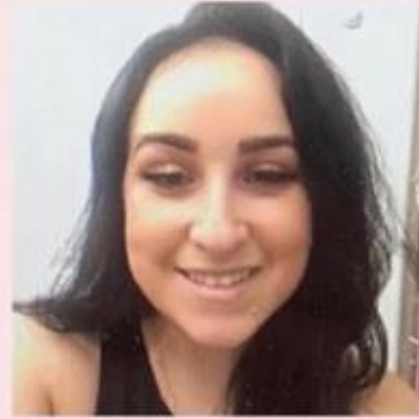


# Retail E-Commerce Internet



# Virtual Consults

## VIRTUAL CONSULTATIONS WITH CHANEL JENAE







**ROAR - Beauty and Body Artistry**  
March 16 · 🌐

🌟🌟 Virtual Facial 🌟🌟 After having some very successful virtual facials I am Hosting another on the 3rd April.

This one will be a pro firm facial, focusing on firming and toning our face and neck areas. As before I will supply everything you need on the day and take you step by step through the treatment answering any questions you may have and introducing products along the way. If you would like to join me please dm to book your space.

#dermalogica #facial #virtualfacial #virtualbeauty #dermalogicskincare

A screenshot of a Zoom video call. There are seven participants visible in a grid layout. They are all smiling and looking at the camera. The participants are of various ages and are in different settings, some in bedrooms and others in living rooms. The Zoom interface is visible at the bottom of the screen.

# VIRTUAL SKINCARE CONSULTATIONS

Want personalized skincare advice?

We're here for you! Book a complimentary 20-minute video session, and one of our experts will curate your customized routine and answer your skincare questions. Each session includes a surprise beauty bonus!

Appointments are available Monday–Friday.





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天猫超级品牌日





# Supplier Challenges





- ▶ Price increases on raw materials, packaging, fuel & transport
- ▶ Recruiting and training challenges
- ▶ Supply chain delays and challenges
- ▶ Uncertainty & budget cuts from buyers
- ▶ Stressed teams
- ▶ Inventory management strategies
- ▶ Re-thinking strategic growth plans



# New Modalities







- 
- A background image showing a hand holding a metal frame with two small bells over several large brass singing bowls on a patterned rug.
- ▶ Meditation
  - ▶ Movement Therapies
  - ▶ Sound Healing
  - ▶ Breathwork
  - ▶ Cryotherapy
  - ▶ IV Nutrition Therapy
  - ▶ Sleep Enhancement
  - ▶ Percussive Therapy
  - ▶ Nutrition
  - ▶ Curated Experiences
  - ▶ Spiritual Journeys



**MASSAGE CAN  
PROVE IMMUN**

spa business  
everyone's talking about.

## Treating Long COVID

breathwork is growing in popularity  
in spas thanks to its mindfulness  
benefits. But could it have a role to  
play in treating Long COVID?

read more at [spabusiness.com](https://spabusiness.com)



# Focus on Immune System

# Holistic Health Practitioners



# Self-Guided Wellness









“OUR DEEPEST FEAR  
IS NOT THAT WE ARE INADEQUATE  
OUR DEEPEST FEAR IS THAT WE ARE  
POWERFUL BEYOND MEASUREMENT

# Recovery Services



# Environmental Treatments



# New Models





**STATERA**  
Integrated Health & Wellness Solutions

*Traditional Medicine.  
Holistic Healing.  
Fitness, Nutrition, Yoga.*

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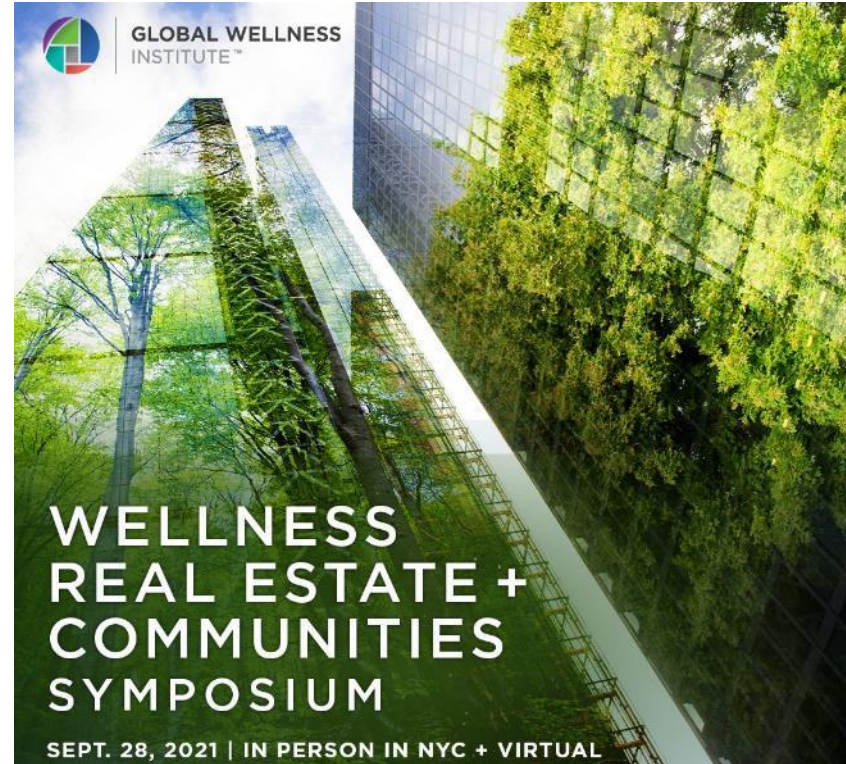
[Book Now](#)



# Breathe. Inhale hope. Exhale healing.

Mind, body, spirit health & wellness.

[Discover](#)



# Spa & Wellness Residences



# NOW OPEN

Our vision has now been brought to life.  
The BIÂN community is alive, thriving, and looking forward to welcoming new members.

EXPLORE  
MEMBERSHIP

VISIT [LIVEBIAN.COM](https://livebian.com)

# Future Spa & Wellness



Grow  
WELL

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