Ten Predictions for the Future of Wellness, Travel, Spa and Beauty in Europe
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Global Wellness Institute tapped European experts, for forecast ranging from how European nations will increasingly tax unhealthy food/beverages to a coming boom in Eastern European wellness properties

The Global Wellness Institute (GWI) released ten predictions on the future of wellness, travel, spa and beauty in Europe. The organization asked its partner experts in Europe – from CEOs of top travel, spa and beauty companies to leading economists and researchers – to forecast where wellness is headed in Europe. Predictions range from European nations increasingly “legislating wellness” by taxing unhealthy products – to a surge in new wellness properties (and discovery of little-known traditions) across Eastern Europe– to the vast European beauty market being rewritten by both wellness and high-tech approaches – to wellness resorts refocusing on nature, peace and authenticity.

The predictions spark a conversation that will continue at the Global Wellness Summit being held in Kitzbühel in Tyrol, Austria this October 17-19. The theme of the 10th annual conference is “Back to the Future”, where the future of the wellness market will be analyzed through the lens of history, for both Europe and the world.

“Europe pioneered the holistic wellness concept, and it attracts more than half of the world’s international tourist arrivals, and is the largest spa, wellness tourism and beauty market in the world,” said Susie Ellis, 2016 GWS co-chair and board member, who presented the predictions today at the Spa Life International conference in Germany. “And while Europe has long been far ahead in wellness, other regions are fast catching up. The focus in Europe needs to be on the future and innovation.”
When it comes to wellness, Europe has for centuries been way out in front: with the region (especially Austria, Germany and Switzerland) inventing the truly holistic wellness concept that extends far beyond spa, to include nutrition, fitness, traditional medicine, mindfulness and a powerful connection to nature (kurs, baths, and healing systems like 19th-century Sebastian Kneipp’s, marrying hydrotherapy, herbalism, movement, nutrition and mental wellness).

For so long, the world has had major catching up to do, but in the last decade they (i.e., the Americas, Asia) have: there has been recent stasis in Europe in innovating new, creative wellness offerings. In the future, Europe will (and must) focus on European Wellness 2.0, and private investment in older, once-state-sponsored European spas - as well as new wellness retreat concepts – will heat up to help make that a reality.
2) Wellness will be legislated: European nations will increasingly tax unhealthy food and beverages – and “Big Food” will remake themselves as wellness companies

More than half of European adults are overweight, with obesity tripling in many European countries since the 80s (WHO). The sheer cost of this epidemic means than more European nations will start taxing unhealthy food and beverages. In March, the UK joined Scandinavian countries, France and Hungary in imposing a sugar tax on canned drinks. The imperfection of the new UK tax (not a brave, broad-based tax on sugar) shows the intense battle-lines between governments and phenomenally powerful “Big Food”. But more countries will take action, and the laws will expand to “bad” fats (like palm oil), high salt and highly processed foods.

Fighting back against the new legislation, European food and beverage manufacturers will reduce the amount of sugar in their products to preempt governments, as they also rebrand/reengineer around “healthy” or “wellness” foods. Nestlé, Europe’s biggest corporation and the world’s largest food company, looks to be taking a radical path: redefining itself as a scientifically-driven “nutrition, health and wellness company,” with plans that its foods will be the vehicle for an entirely new type of medication: both preventive treatments and traditional medicine…rewriting what “food” and “pharmaceuticals” could be in the future. Watch this space.
3) Tourism will be Europe’s fastest growing sector – and wellness travel will grow even faster

Tourism will continue to have a very strong economic impact in Europe, and wellness tourism will grow even faster. Europe’s tourism market will grow 2.8% a year over the next decade, outpacing annual economic growth of 1.9% - making it Europe’s fastest growing market, equaled only by the financial sector. As Europe rapidly moves towards a service economy, tourism suddenly has greater absolute value than sectors like agriculture, manufacturing and chemicals – and represents nearly 60% of Europe’s entire retail sector.

And with vastly increased stress, an aging population, and people’s new quest for total wellbeing, over the next decades European wellness tourism will grow significantly faster than tourism overall. For instance, Global Wellness Institute research estimates a 7.3% annual growth rate between 2012-2017. The wellness travel outlook is very positive in mature Northern and Middle European nations; will grow even faster in Southern Europe (Italy, Spain, Portugal, etc., provided their economies continue to strengthen their recovery); and is bullish for the rest of developing Europe (including Russia, depending on economic/political factors) – where it’s safe to say it will expand at the pace of the middle class.

<table>
<thead>
<tr>
<th>Country</th>
<th>Annual Growth Rate</th>
<th>Wellness Trips Added</th>
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</thead>
<tbody>
<tr>
<td>Russia</td>
<td>13.1%</td>
<td>8.5 million</td>
</tr>
<tr>
<td>Turkey</td>
<td>12.6%</td>
<td>5.4 million</td>
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<td>Poland</td>
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<tr>
<td>Hungary</td>
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<tr>
<td>Czech Republic</td>
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<td>Austria</td>
<td>6.9%</td>
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</tr>
<tr>
<td>Spain</td>
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<tr>
<td>France</td>
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</tr>
<tr>
<td>Germany</td>
<td>4.7%</td>
<td>12.7 million</td>
</tr>
</tbody>
</table>

Snapshot: Leading European countries for wellness tourism growth, 2012-2017
4) “Get Thee to a Wellness Monastery”: European wellness resorts will refocus on deep authenticity, peace, quiet and nature

The European (and global) consumer is facing unprecedented stress and 24/7 digital connection and “noise.” Radically pressured lives mean we don’t feel well anymore, and it’s creating new desires: for complete time out, uncompromising peace and quiet, and to be close to the forces of nature. And European wellness/spa resorts will increasingly shift their focus from glitzy, amenity-driven, “exotic” luxury to meet these powerful needs. Everything – from resort design/environments, guest rooms, spa treatments and fitness experiences – will shift to intense authenticity and nature…the new stage for self-transformation and “re-finding oneself.”

Equal parts spectacular and simple wellness retreats will appear on top of mountains, deep in the woods and snow, on the water, in the form of everything from treehouses to houseboats. Spas, treatments and saunas will emerge from the basement to burst out into the trees as new “nature cocoons.” The new luxury: sleeping in a glass igloo, wrapped in reindeer skins, with the Northern Lights sparkling above. Wellness retreats being developed in former monasteries (i.e., Schloss Mondsee, Austria; Eremito, Italy) are as much a tangible trend as a perfect metaphor for the future directions in Europe’s wellness destinations: calm, simplicity, wild nature, spirituality and profound self-seeking will be front-and-center…and they will give Europeans (and the world) what they most desperately seek.
5) Spa 2.0: Rise of the European mini-kur

Bathing, and going on serious (10-day-plus) kurs, has always been a way of life in Europe. But now this time-honored, time-intensive tradition is emerging as a much shorter affair. “Mini-kurs” that pack in a 2-3 hour bathing ritual, spa treatments, nutritious food, movement, relaxation, and meditation/mindfulness (in one day or two) will trend. “Taking the waters” and hitting spa resorts will happen in shorter injections because busier Europeans are short on time, and there’s also growing unease about air travel, so people are staying closer to home.

The “wellness staycation” concept, which has been popular in Scandinavian countries for some time, will now spread across Europe. And people will increasingly embrace these much shorter, but still transformational “just being” experiences everywhere from Tylösand Hotel & Spa in Sweden to Fredreichbad in Baden Baden, Germany.
6) A wave of new wellness properties and traditions - from the Baltic to the Black to the Caspian Seas - will be discovered by the world

European wellness seekers will increasingly “head east,” from the New Europe stretching from the Baltic to the Black Seas, further out to the Asian Caspian Sea. This region will undergo exciting wellness resort development, opening up their fascinating, little known wellness traditions to the world. So many forces are driving this eastward Wellness Renaissance. As former Soviet republics regain their footing, leading global wellness brands (whether Six Senses in Kazakhstan or Chenot Palace coming to Azerbaijan) are making moves – and the wellness property pipelines are heating up in Croatia, Estonia, Georgia, Latvia, Lithuania, Macedonia, Montenegro, Slovakia, Slovenia – and the seaside “Stans.” The region not only boasts an incredible, centuries-old, spa and bathing culture, the modernization of huge, former Soviet medical-wellness health resorts is underway. For instance, the stunning Kemeri Wellness Village & Hotel under development in Latvia (once a 19th-century bathhouse under Tsar Nikolai I, and a Soviet-era health resort with 100 doctors and 1 million treatments performed annually) is a
shining example. Set in historic buildings in a National Forest, this new wellness community will include a 5-star hotel and clinic, with programs from balneotherapy to sleep to fertility.

And if the wellness traveler craves new, hyper-authentic experiences, the Baltic-to-the-Black Sea traditions, where Nature is Healer, really deliver. From climate therapy (where precise microclimates, including “doses” of mineral water, sunlight, contrasting temperature and humidity, and exposure to phytoncides from forest bathing, are prescribed – to the unique bathing tradition of the “pirt” (so different than the Russian banya), where forest-gathered herbal “besoms” (bouquets) are applied – to the ancient (and antioxidant) “black smoke saunas” – to a powerful focus on “wild fitness” and music therapy. The Baltic-to-the-Black-Sea nations have some of the most established wellness cultures on Earth, but they’ve flown under the radar. That’s about to change.
7) First true chain of hot springs resorts will stretch across Eastern Europe

Look out for the first true chain of branded hot springs properties (a collection of wellness hotels owned by one company) to stretch from Poland in the North to Moldova in the South. These will be fantastic thermal water retreats integrating medicine and wellness, and capitalizing on Eastern Europe’s (including countries like the Czech Republic, Hungary, Slovenia and Slovakia’s) abundant natural springs and kurs, long-established medical-wellness retreats, and rich-in-culture cities.

Private companies will work closely with state tourism departments to create safe destinations with reduced risk of terrorism, and once developed, this property network will likely become the world leader in “hot springs wellness.” And as the thermal springs movement gathers steam, look for national tourism boards, or group of countries banding together, to promote this new “Hot Springs Road” that will wind across Eastern Europe: from Budapest to the amazing Karlovy Vary spa town in the Czech Republic.
8) Wellness will rewrite the European beauty market: “Beauty from the inside out” overtakes “hope in a jar”

The legacy global beauty culture is largely a European creation, where the focus has long been on the “cosmetic” (or external “appearance” and “artifice”). But a megatrend unfolding in Europe (as it has in the U.S. and Asia) is wellness-as-beauty…or “beauty from the inside out.” And this dramatically different philosophy and aesthetic will shake up the marketing strategies and sales monopolies of the big cosmetic/skincare houses. Because the beauty-comes-from-within argument makes the cosmetics (and purely topical skincare) argument look more like hyped “hope in a jar.”

The European wellness-as-beauty wave will inspire new categories that will recast beauty as self-care and prevention vs. mere “cosmetic repair”: a dizzying array of functional solutions, along with a boom in the natural and organic generally (whether applied “within” or “without”). Is it all over for skincare and cosmetics? Hardly. One example: two French companies, L’Oreal (with their Vichy and La Roche-Posay brands) and Pierre Fabre (with Avene) show how wellness creates a new mega-category: healthcare for the skin. These products offer up the European heritage wellness of mineral springs water. And in the future almost every European company will adopt a wellness-as-beauty vocabulary and approach: whether it’s active cosmetics, dermocosmetics, etc. And crucially, with the shift to beauty-as-wellness, greater emphasis will be placed on evidence.
9) High-tech beauty (devices and more aggressive procedures) finally hits Europe

Near-medical, high-tech, device-driven beauty procedures are a booming market in the Americas and Asia, and they’re about to become one in Europe. We will see European hotel spas increasingly offer sophisticated “I-want-results-immediately” treatments using all types of cutting-edge beauty technology - which might start with a computer precisely analyzing your skin condition, followed by an intensive microdermabrasion peel, ultrasound or needling. At European spas, a “holistic” approach won’t just mean adding yoga, meditation or nutrition to massage, it will mean adding high-tech beauty to the already high-touch menus.

But the international differences will remain huge: while Asia and the U.S. are embracing ever-more-invasive procedures, Central Europe, for example, is only getting accustomed to microdermabrasion and ultrasound. And with the European beauty consumer a unique balance will need to be struck: they want high-impact results, but typically won’t accept any downtime after a treatment.
10) New, important distinctions will be made between wellness, wellbeing & happiness

Shifts in language indicate shifts in thinking. If we’ve had the term “wellness,” the “quality of being healthy”, with its emphasis on proactive improvement of physical, mental, social, etc. health, since the 1970s, there has recently been a confusion, or even a supplanting, of the concept by the terms “wellbeing” and “happiness” – in Europe and globally. This has been spurred by important research that measures “happiness” (i.e., the “United Nations World Happiness Index”) and “wellbeing” (i.e., the “Gallup Healthways Well-Being Index”) in nations around the world, which captures key measurements like social support, trust in government/business, freedom – in addition to income realities and the physical health of the population. These studies have helped put “happiness” and “wellbeing” on the global stage, with a growing implication that these are “bigger,” more capacious concepts than wellness.
But they also reveal why confusing “wellness” and “wellbeing” is problematic. For one, “happiness” measurements are often not good indicators of a population’s health. One example: Mexico ranked #10 (out of 200+ countries) in Gallup’s well-being report, despite having the highest obesity rates in the world. And these studies capture “perceptual” wellbeing (they survey people). This can skew things: if a population has lower expectations (of money, education, health) they might rate their happiness higher than wealthier nations – and one might feel a little less “happy” if they were surveyed later when they’re sick from a chronic disease. Measuring happiness is very important, but we don’t want to lose sight of the goal: taking action to create a healthier world. It’s not enough to take the “heartbeat” of happiness…we have to change people’s heartbeats.

Europe has much to teach the world about “wellness,” “well-being” and “happiness” (North European nations dominate the UN Happiness Report). But there will be a growing distinction between these terms/concepts there, with wellness becoming associated with health and prevention and wellbeing associated with happiness. In a world where wellness has become a massive, so, heavily commercialized, market, there’s a temptation to move on to a fresh, big word. But Europe especially, as the pioneer of holistic wellness, should embrace “wellness” – staying true to the prevention mantle that will be so important for the region, and the world.

For more info, or to speak to one of the experts, contact

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