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# Global Spa & Wellness Summit

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## Global Hotel Spa Forum

Breakout Discussion Forums: Global Hotel Spa  
Monday, October 7, 2013  
Grand Ballroom

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This White Paper is based on the opinions and collaboration of over 100 global hotel spa industry experts attending the 2013 Global Spa & Wellness Summit, as well as others who sent in their contributions by email.

## **White Paper: Hotel Spas at a Crossroads - Defining the Next Decade**

### **Background:**

Hotel spas represent an estimated 16 percent (approximately 14,000) of the 87,000+ spas in operation worldwide, according to SRI International data from 2012. However this sector accounts for a significantly larger share of the market, representing roughly 27 percent (\$19 billion) of total spa industry revenues (\$73 billion).

The spa boom in the first decade of the new century was primarily led by luxury spas in the hotel and residential segment. Since then new challenges have arisen: “luxury for luxury’s sake” has become less popular; there has been a slowdown in the development of residential and mixed-use projects; and there is more focus on ROI for hotel spas – both for operating performance and capital.

So, there is a lot on the minds of executives at many leading hotel companies. Hotel spa leaders and other industry stakeholders are starting to address how to re-energize this spa sector, and drive more guests, better margins and the most innovative and relevant programming and facilities.

This paper represents the discussions - and recommendations for action - from a wide group of people attending the Global Spa and Wellness Summit (GSWS) in October 2013. And the Hotel Spa Forum at the 2013 GSWS represents the first executive-level discussion group that addressed these issues directly.

**The process for creating this white paper included:**

- Requests to 25 industry leaders to submit the key questions/challenges facing them in the future (prior to the Summit)
- Development of a summary of industry-wide “burning questions” (prior to the Summit)
- Testing these “burning questions” at the Summit with a “vote with your feet” session
- Sub-group discussions on 6 dedicated topics with recommendations/action steps
- Group discussion on technology and its future role for hotel spas

**Industry Leader Question Results:**

An email request was sent to 25 leaders in the hotel spa sector to send in their most pressing concerns about the future. We asked what questions about the business kept them awake at night. A selection of specific responses is included in Appendix II.

The top questions revolved around the following topics:

1. Are we financially relevant within the hotel industry based on our ROI/ROC/overall contribution? If not, does this make us vulnerable?
2. Without industry benchmarking (KPIs, or Key Performance Indicators), will we ever be able to intelligently discuss performance with hotel leaders who do not understand our business?
3. How can we grow the size of our business? It seems that capture has been stagnant for some time.
4. Are we taking any risks? Are we in danger of being one, homogeneous industry with little differentiation between brands, programs and design?
5. Is wellness the answer? Everyone (owners/investors/brands) wants it, but no one knows what it *is* exactly or how it might make a business case. Are we sure hotel guests want it in the hotel environment?
6. Do we have the spa business leaders in our spas that we need to take the industry to the next level? Do we have the talent in providers available as the industry grows?

7. How do we maximize the opportunity in retail? This is likely the most neglected business line.

*NOTE: While retail and talent represented key questions, the focus of the discussions was on the other areas because the 2013 GSWS also hosted dedicated forums (and produced separate white papers) on spa education and retail.*

**Burning Questions – Voting Results:**

GSWS Hotel Spa Forum participants were asked to “vote with their feet”: to stand and move to one side of the room marked “agree,” or to the other side of the room marked “disagree”. While some industry leaders assembled opted for the middle (as they hadn’t yet reached a definitive answer), the majority opinion is listed below.

This exercise was designed to stimulate discussion for the group breakouts and to encourage realistic and honest views. The format was designed to be provocative.

It was clear that the majority agree that the hotel spa business has to be (at minimum) re-energized to take over a lead position once again. And in these initial lively group questions, most felt that the hotel spa industry needs to adapt and change to continue be relevant and vibrant to the consumer of the future and to add increasing value to the hotel sector.

Here are the burning questions that were posed, and the overall “agree” or “disagree” results:

BURNING QUESTIONS	VOTE
Have hotel spas lost their luster - and are no longer the spa trend leader as they were in the early 2000’s? Have they have hit their peak and are in decline?	<b>AGREE generally, but may not be in decline</b>
Do all hotel spas look the same? Is design innovation stagnant? Are there not many innovative hotel spa design specialists?	<b>DISAGREE</b>
Will we only grow new customers by expanding our offerings – i.e., by getting into the broader wellness business or even medical? Is that where the profit is?	<b>AGREE</b>
Are hotel spas not good stand-alone business investments? Is even the “rub off “effect hard to measure?	<b>50/50</b>
Are hotel spas irrelevant to the young tech savvy consumer?	<b>DISAGREE</b>
Do hotel spa brands not deliver the incremental profit usually expected from great brands?	<b>DISAGREE</b>

Do hotel spas no longer help define or differentiate the hotel experience? Have they become a “must have” amenity?	<b>AGREE – on the “must have,” but lively, strong debate about whether they still define/differentiate the hotel experience</b>
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**Breakout Discussion Group Topics:**

The forum was broken out into 6 sub-discussion groups, each with a dedicated question/topic to explore. Each group was asked to identify challenges, opportunities, recommendations and/or actions for each. Each group was also specifically requested to touch on technology as it related to their topic.

For the agreed upon recommendations and actions, each group was asked to focus on what the industry could do (or what we as a group could do collectively) vs. what actions could be taken by individual businesses to foster a prosperous future.

1. **Hotel Spa Design** – *Are they starting to all look the same?*  
Can spa design become a key component of innovation and profitability?
2. **Guests** – *Can we grow the market size and frequency of visits?*  
How do we widen the hotel spa customer base and make hotel spas a better lifestyle connection?
3. **Differentiation** – *Are hotel spas and their brands largely the same in the mind of the consumer?*  
How can hotel spas stand apart from their competition? Does differentiation within the hotel segment help the sector overall? How do spas help hotels differentiate or can they?
4. **Wellness** – *While growing in popularity in the conversation, is the risk and reward for investment questionable in our segment?*  
Can hotels climb on board credibly with the wellness direction? Are spa leaders more interested in this than their hotel guests?
5. **Performance** – *Do spa executives think like hoteliers or investors?*  
Is there a competitive ROI given that the “rub off” effect in driving real estate sales or room rates is hard to prove? Will the hotel industry ever embrace this “Minor operating department” seriously?
6. **Surprise** – *Free for all discussion.* This group was encouraged to think about any issues or opportunities that they thought were the most compelling.

**Summary of Discussions:**

The discussion summary of each group is included in Appendix I.

While all forum participants were confident about the future for this spa sector, some participants did think hotel spas had lost some of their luster. The group was positive (and lively) about the opportunities.

Many expressed that the hotel spa sector needed to (and could) recapture the leadership and innovation that it recently had within the wider spa industry. There was agreement that much of this is the responsibility of each hotel company and spa brand, but that there were also many common issues that could be solved, and opportunities seized, by more industry-wide collaboration.

While the topics were different, common threads emerged. Highlights included:

1. **Technology will play an important future role** and we will need to embrace it to:

- a. Build ongoing customer relationships (and more emotional, personalized connections)
- b. Enhance the experience and effectiveness in the spa from design to treatments to programming
- c. Improve financial performance

There were many discussions about diverse technology opportunities, but also many about how the hotel spa industry still lacks knowledge and skill in this area.

2. **Independent hotel spa industry benchmarking is critical if the sector is to be taken seriously by owners and investors.**

- a. The hotel spa sector must have independent benchmarking of key financial performance numbers by a third party. Renewed effort by the industry is critical, and we must get more participants involved in these efforts begun several years ago by earlier Summit recommendations.
- b. The group vote was 50/50 on whether hotel spas were a good financial investment. This might have meant that 50% of participants view their own businesses as a good investment as there are no industry-wide benchmarks. Compared with competing hospitality investments, the return on capital lags behind.
- c. Independent research showing the relationship between the satisfaction and emotional connection with a spa guest, and overall resulting hotel guest satisfaction and loyalty, is lacking and must be undertaken. There are best practices and brand-specific proprietary examples but nothing independent or causal (i.e., how having a spa impacts guests to choose hotels).

- d. Sharing nonproprietary best practices for improving success would be helpful, and, in particular, strategies on how to best educate hospitality leadership/GMs.

**3. The size of the spa market has to grow AND there is a growing need for personalization.**

No current industry consumer study on trends, preferences and drivers for spa and wellness exists. We need to analyze our guests' needs (guest-centric) vs. our industry needs. We need to determine not just how we connect with them physically, but also emotionally. The hotel spa industry also needs to widen the funnel of capture, which seems to have stagnated over the past few years.

- a. An industry-wide customer study looking at trends, preferences and drivers related to spa/healthy lifestyles is strongly recommended as an initiative for the GSWS.
- b. The study should address the diversity of this market that has been traditionally looked at as one homogeneous group. This should include age demographic research (the needs of aging Baby Boomers vs. Gen X, etc.) and capture cultural diversity. Second-phase diaspora studies could result for high potential groups identified.

**4. Re-energizing the hotel spa industry segment will require innovation, risk and significant differentiation in products and brands, including specialty spas and niche offerings.**

While the group (in the “burning questions” session) initially “disagreed” that there was a lack of innovation in hotel spa design, there was general agreement in all discussion groups that the sector was not the most innovative on this front, and that differentiation was critical, but not easy within a hotel industry that is also not particularly innovative. While spa brands still added value, they were not as fully differentiated as they really might be. Almost all groups argued for some form of greater personalization, specialization, and niche requirements, etc.

- a. Action in this area will largely be required by hotel and spa brands themselves, and they may be forced to do this as more innovation comes from private day spas and destination spas - and they want to compete.

- b. Customer research and trends will also help spur innovation.

**5. Wellness is generally agreed to be required to some degree in hotel spas, but *what* wellness components, and how to implement them *profitably*, is still energetically debated.**

Wellness is not totally understood as a concept. Consequently, there was discussion about how to define it for the purposes of the hotel spa segment. Lifestyle was discussed as a possibility. But it's still unclear if this is a profitable strategy for hotel spas regardless of definition as there are no case studies to point the way. And there is no clear research that indicates that hotel guests (even in luxury settings) really want programming like lifestyle coaching in a hotel environment – they may want it, but not here.

This may be an issue that will remain up to each brand/spa to determine the right approach, but again there is no research on guest response and needs with respect to implementing this at hotels. The hotel spa experience may end up encompassing the full range, from amenity to comprehensive lifestyle location, but the key forum consensus was each property “knowing what you are.”

- a. The debate over hotel spas implementing more wellness programming supports the need for: industry-wide customer research; embracing technology, in particular for personalization (which experts argue is critical in any lifestyle approach); and benchmarking that differentiates amenity spas, resort spas and wellness/lifestyle spas at hotels.

**6. *There is a KEY need for talent – in particular leadership - but this was addressed in the Global Spa Education Forum. For any of the above requirements to happen, strong spa business leaders will be key in working from the ground up to convince hotels of the benefits beyond a simple amenity.***

**7. *There is an opportunity for retail - this was also addressed at the Global Spa Retail Forum.***

## **Industry Recommendations & Action Items Identified:**

### **1. Guest research**

- a. Develop a hotel spa industry-wide study targeting current and potential guests to understand and predict varying needs, where there are the most opportunities to broaden the market, and that addresses questions of spa/wellness, luxury/prevention, and opportunities for niche growth.
- a. Draft this study proposal for potential funding and propose it as a key, future GSWS research initiative.

### **2. Increase collaboration**

- a. Develop a hotel spa discussion group to further tackle challenges and recommendations and to propose initiatives such as panels and forums at future GSWS meetings. There was broad consensus to have dedicated, ongoing discussion groups for this sector.
- b. Set up an open online forum to continue to collaborate and share views.

### **3. Become strong advocates for industry benchmarking/business intelligence**

- a. Create another working/advocacy group to meet and make recommendations on benchmarking and internal hotel spa business education.
- b. Add research on hotel spas' contribution to guest emotional connections/loyalty and resulting KPIs to this team's initiatives.

### **4. Explore technology opportunities to solve guest, collaboration, benchmarking and differentiation**

- a. Set up a working group with technology providers to explore opportunities for:
  - i. Integrating systems of data to drive business forward
  - ii. Enabling greater personalization
  - iii. Enhancing the experience – from design to therapies
- b. Encourage a strong focus for industry forums on technology, including at GSWS.

## APPENDIX I - Notes from Each Discussion Group

<b>LOOKING INWARD - KEY ISSUES FROM DISCUSSION GROUPS</b>	
<p><b>GUEST</b></p> <ul style="list-style-type: none"> <li>• Capture Rates are stagnant – need more focused/supported effort in our own businesses to engage the overall hotel to be selling</li> <li>• Visibility in hotel is often lacking</li> <li>• Segmentation used – dealing with guests as one group</li> </ul>	<p><b>FINANCIAL/PERFORMANCE</b></p> <ul style="list-style-type: none"> <li>• Lack of consistent KPIs</li> <li>• ROI lags other areas for competing \$</li> <li>• Capture Rate stagnant</li> <li>• Local market not fully explored</li> <li>• Labor costs rising (margin is small)</li> <li>• Fitness/other costs cloud profitability</li> </ul>
<p><b>DESIGN</b></p> <ul style="list-style-type: none"> <li>• Spa specialists/brands involved too late in design process</li> <li>• Few/no risks taken – brands/designers</li> <li>• Owner involvement generally not knowledgeable, but often not challenged</li> <li>• Zones for fitness (often children)/salon (often leased) can be disruptive to design</li> <li>• Not in hotels’ DNA</li> <li>• Doesn’t tell/sell the story</li> </ul>	<p><b>WELLNESS</b></p> <ul style="list-style-type: none"> <li>• Too broad a term to achieve understanding or potential business evaluation</li> <li>• Requires some rethinking of the concepts</li> <li>• Profitability not apparent at the moment</li> <li>• Destination spas own this market – hotels not viewed as places with health trust (as seen as luxury trust)</li> <li>• Not currently a driver of business – can it be?</li> <li>• Lifestyle change better angle than broad wellness? Focus starting with one thing? Innovation important, like Bollywood dance therapy.</li> <li>• Need to diversify from standard hotel concept/hybrid model to be success?</li> </ul>
<p><b>DIFFERENTIATION</b></p> <ul style="list-style-type: none"> <li>• Hotel spas lack differentiation – all fighting for the same 20%</li> <li>• May be viewed as “not for us” by others - increase perceived accessibility</li> <li>• Many massage centers – focus more on role of water, prevention. Under-utilized.</li> <li>• Few offer lifestyle</li> </ul>	<p><b>GENERAL (Open)</b></p> <ul style="list-style-type: none"> <li>• Lack of creativity in business without enough differentiation</li> <li>• Lack of talent pool and consistent and growing labor market to match the growth and trends</li> </ul>

**LOOKING OUTWARD – KEY OPPORTUNITIES FROM DISCUSSION GROUPS**

<p><b>GUEST</b></p> <ul style="list-style-type: none"> <li>• Understanding guest segments and developing specific programs relevant to them</li> <li>• Sharing best practices within the hotel spa industry to try to grow the market overall</li> <li>• Technology enablers – e. g. pre &amp; post arrival</li> <li>• Opportunities to partner with other key healthy brands to help explain the experience and sell</li> </ul>	<p><b>FINANCIAL/PERFORMANCE</b></p> <ul style="list-style-type: none"> <li>• Wellness Integration – in all areas of the hotel</li> <li>• GM Education – getting the business right</li> <li>• Other internal ambassadors developed</li> <li>• Revenue Management</li> <li>• Improved accuracy of data across the industry</li> </ul>
<p><b>DESIGN</b></p> <ul style="list-style-type: none"> <li>• Take design and concept risks</li> <li>• Incorporate technology – i.e., wearable devices to improve connectivity</li> <li>• Address the time-impooverished; embrace greater speed of access</li> <li>• Say no (not all things) - build to suit market needs</li> </ul>	<p><b>WELLNESS</b></p> <ul style="list-style-type: none"> <li>• Technology &amp; data collection</li> <li>• Spa/wellness Apps</li> <li>• Understanding of drivers of room nights/ guests staying for another purpose</li> <li>• Prevention focus/healthy stays/ education</li> <li>• Rehab – option for non-invasive medical</li> <li>• Day spa concept integration</li> <li>• NOT medical wellbeing</li> <li>• Consumer education</li> </ul>
<p><b>DIFFERENTIATION</b></p> <ul style="list-style-type: none"> <li>• Link spa to hotel to get every guest</li> <li>• Insurance companies/lose luxury stigma</li> <li>• Hours of operations</li> <li>• Customize/segment/niche/male/fe male</li> <li>• Health emphasis</li> <li>• Spa-hotel room conversion</li> <li>• Pre/post experiences Key</li> </ul>	<p><b>GENERAL</b></p> <ul style="list-style-type: none"> <li>• Understand the differences for Gen X and Gen Y</li> <li>• Corporate Sales</li> <li>• Wellness – big topic that needs its own debate/exploration for sector</li> </ul>

<b>KEY ISSUES - ROLE OF TECHNOLOGY – ADDITIONAL INPUT FROM THE GROUPS not included in issues/ opportunities</b>	
<b>GUEST</b>	<b>FINANCIAL/PERFORMANCE</b>
<b>DESIGN</b>	<b>WELLNESS</b> <ul style="list-style-type: none"> <li>• Embrace technology to qualify key wellness pillar integration (e.g. nutrition, fitness, movement, evidence, rest and sleep) - HAS to be integrated</li> <li>• Data collection – cloud storage</li> <li>• Devices/wearables/mobile apps</li> <li>• Affordability</li> <li>• Extending the spa experience/develops connection/belonging</li> <li>• Allows for collaboration</li> </ul>
<b>DIFFERENTIATION</b> <ul style="list-style-type: none"> <li>• Personal bio monitors – in table set up</li> <li>• Pre/Post - push to mobile/ heart monitor/arrival</li> <li>• App interface</li> <li>• Innovation in spa equipment</li> <li>• Follow guest/beginning to end/spa to spa throughout a chain</li> <li>• Business intelligence for personalization</li> </ul>	<b>GENERAL</b> <ul style="list-style-type: none"> <li>• How to use technology to reach/engage Gen X/Y</li> <li>• Better way to integrate systems and data to drive business forward with true business intelligence</li> </ul>

<b>RECOMMENDATIONS AND ACTIONS</b>	
<p><b>GUEST</b></p> <ul style="list-style-type: none"> <li>• Better integration between the hotel and the spa</li> <li>• Guide to attracting younger spa customer               <ul style="list-style-type: none"> <li>○ By region/Asia social media/Europe mother/daughter</li> </ul> </li> <li>• Best practice guide to “emotional intelligence” understanding of guest segments and target markets</li> </ul>	<p><b>FINANCIAL/PERFORMANCE</b></p> <ul style="list-style-type: none"> <li>• Education consistent for spa managers/GM’s</li> <li>• KPIs consistent within the industry - BENCHMARKING</li> <li>• Consumer survey to understand varying customer needs</li> </ul>
<p><b>DESIGN</b></p> <ul style="list-style-type: none"> <li>• Fund a research project to provide empirical data (not anecdotal evidence) that shows how emotional outcomes from spa improves the hotel spa’s commercial contribution – in the spa AND in the rest of the hotel: loyalty, guest satisfaction and profitability</li> </ul>	<p><b>WELLNESS</b></p> <ul style="list-style-type: none"> <li>• Elevating the importance of spa within the hotel/repositioning it from “Spa Department” to “Wellness Hub”</li> <li>• Embrace all aspects of technology</li> </ul>
<p><b>DIFFERENTIATION</b></p> <ul style="list-style-type: none"> <li>• Personalize &amp; specialize/go deeper into what you do best</li> <li>• Integrity/link of authentic brand to hotel</li> <li>• Make an emotional connection with pre/post consultations</li> <li>• Shorter treatments to fit into schedules/ include design for express</li> <li>• Panel on differentiation to show best case studies with metrics and KPIs</li> </ul>	<p><b>GENERAL</b></p> <ul style="list-style-type: none"> <li>• Follow up conversations within this segment with the lists/ideas from this session</li> <li>• Corporate Sales (spa to companies): how to approach and stay engaged with corporate clients with relevant regular content that does not feel like SPAM</li> <li>• Develop knowledge for how to adopt/use technology. I.e., for Gen X/Y how to effectively tie word of mouth/technology positively together</li> <li>• Need to find a better way to integrate systems and data to drive our businesses forward with true business intelligence</li> </ul>

## **Appendix II**

### **Developing the Burning Questions:**

Interview with/email to 25 leaders with an interest in hotel spas regarding the questions, opportunities and solutions being considered. This was used to shape the “burning questions.”

#### **Selection of the burning questions/issues most affecting hotel spa business in near term**

- Spas are up in volume this year. All urban spas have great locals. Opportunity to maximize positioning of hotel using spas.
- Hotel spas – amenity/driver – are critical to hotels now but may not be differentiator in most.
- Hotel spas are necessary for variety of reasons, from cultural experience/introduction - to recovery from stressful travel/business. The basics are best and each spa needs to perfect what its mission is. There isn't much more than that.
- Spas are complex businesses but don't drive enough return to afford the skills/experience to maximize them.
- Spas need to be made bigger/more prominent to drive sufficient revenues to pay a leader OR go smaller and simplify/narrow offering
- Spas lack differentiation – the feel, look, offer, smell, etc. too often the same. Someone can break out and go after new/different customers. Differentiation will drive innovation.
- Reach out to new markets to widen the pool – the size of the pool of hotel spas has been quite stagnant.
- Engage hotel management in the culture/process and opportunity that spas in particular have for driving guests and business.
- New uses of resources such as seawater heated to 34-36 degrees, creating an osmotic and physiological phenomenon in 15 minutes. Strengthens immunity/bones.
- Wellness/medical are important in anti-aging and slimming and shaping and need to be in spas.
- Spas can still be larger drivers of rooms but question is how to catch the guest and create a link to the room stay. Need to share global best practices depending on market and culture.
- After “big is better,” early ability to lift ADR by adding spas and then to a competitive necessity has left the spas in stagnation.
- We are too inward-looking and always talking to believers. We need to involve outsiders or outsider thinking.
- We will never reach our full potential in hotels, because we exist outside the core business and most often outside the core decision makers.

- How do we remain relevant or on the forefront? If not we will be passé or at best stagnant – like ketchup.
- Wellness is an answer – NOT medical but need promotion and education for how to live a lifestyle to eliminate medical dependence.
- Can we shift to think about hotels as wellness places/spas where you can also sleep? Can we really do this without having the entire property engaged in this? They aren't destination spas – they are also about indulgence.
- Spa needs to change to wellness center and will, but will take on a wider range of requirements and investments.
- Spas are still seen as pampering and need to become more about wellness lifestyle, even at hotels. But it needs to be incorporated in the luxurious experience of a hotel. Luxurious well experience vs. luxury pampering.
- Is retailing with its better margins a way to create more flow through? Flow through to the bottom line will create more awareness and acceptance.
- Why can't we get retail right? (3 responses on retail)
- Can technology be embraced differently across design, operations and customer acquisition to make a significant difference in hotel spa success?
- Are we using the right measures of success? An owner looks at profit per sq. ft., so maybe we need to look at both – how big or how much?
- Training/certification of therapists.
- Trends for the next 12 – 24 months?
- How can we integrate medical and wellness - should we? Do our customers want it?
- Is there any innovation in design? Or, in fact, any real expertise in spa design that combines knowledge of how spas make money, work etc.?
- Fitness is important to hotels BUT even with all the talk about it, it's still only about 10% of occupied rooms that go to the gym. Could this be a way to reach many guests? It's a necessity anyway...
- Is there a new link to the seniors market?
- Design is boring – size doesn't cut it. Water is a challenge potentially, but crucial and getting cut due to costs.
- Are any spa brands relevant? Or do global spa brands need to achieve greater local relevance? Do they really deliver upside – will guests pay more for branded vs. unbranded? Do brands add to hotel valuation?
- Wellness is in danger of becoming a “catch all” and more of a marketing buzzword. Hotel guests (all spa guests) do want results from services and experiences whether cosmetic or therapeutic. Hotel spa guests are worldly and more informed – less fluffy.
- Hotels are evolving to becoming social hubs. Could spas contribute to getting hotels to the next generation?

- Spas are becoming stagnant within an industry that essentially hasn't radically changed in a 100 years. Innovation will likely not come from being locked within this business unless it can do something so innovative it turns the rooms/F&B business in a different direction.
- Is there a new role potentially emerging for spas within the context of hotels?

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