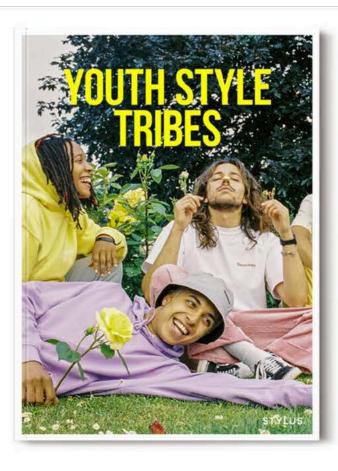
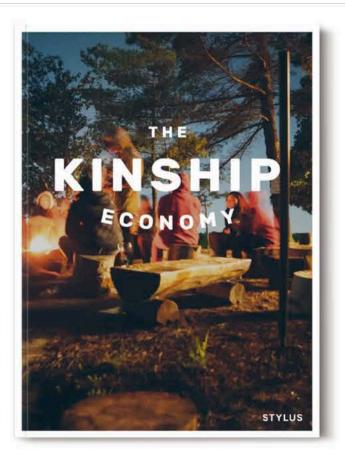
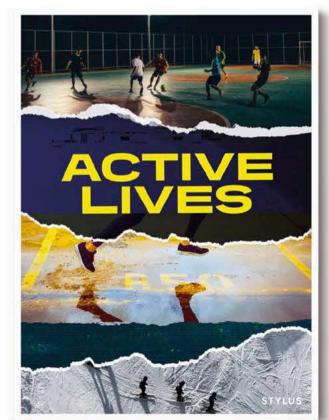
## TRAVEL FOR NEW WELLNESS RHYTHMS

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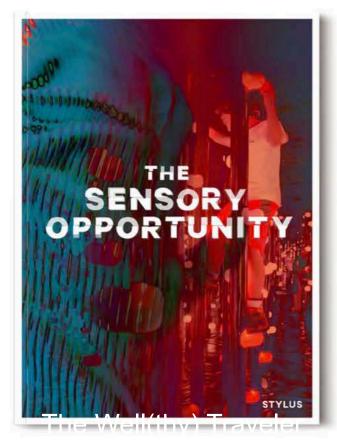


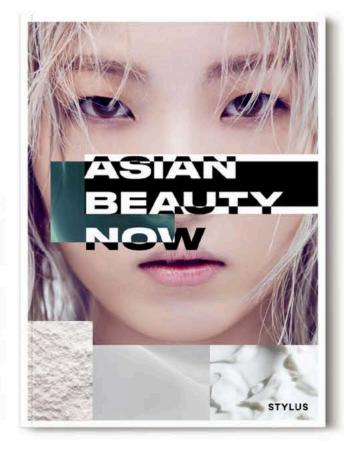


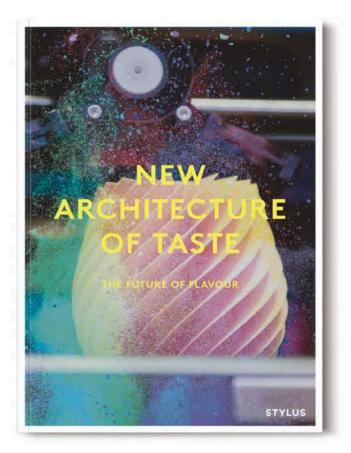


Stylus is a research and trends intelligence company that helps businesses across 20 different industries to understand and apply global consumer lifestyle, product and engagement insights, into their short and long term strategies.

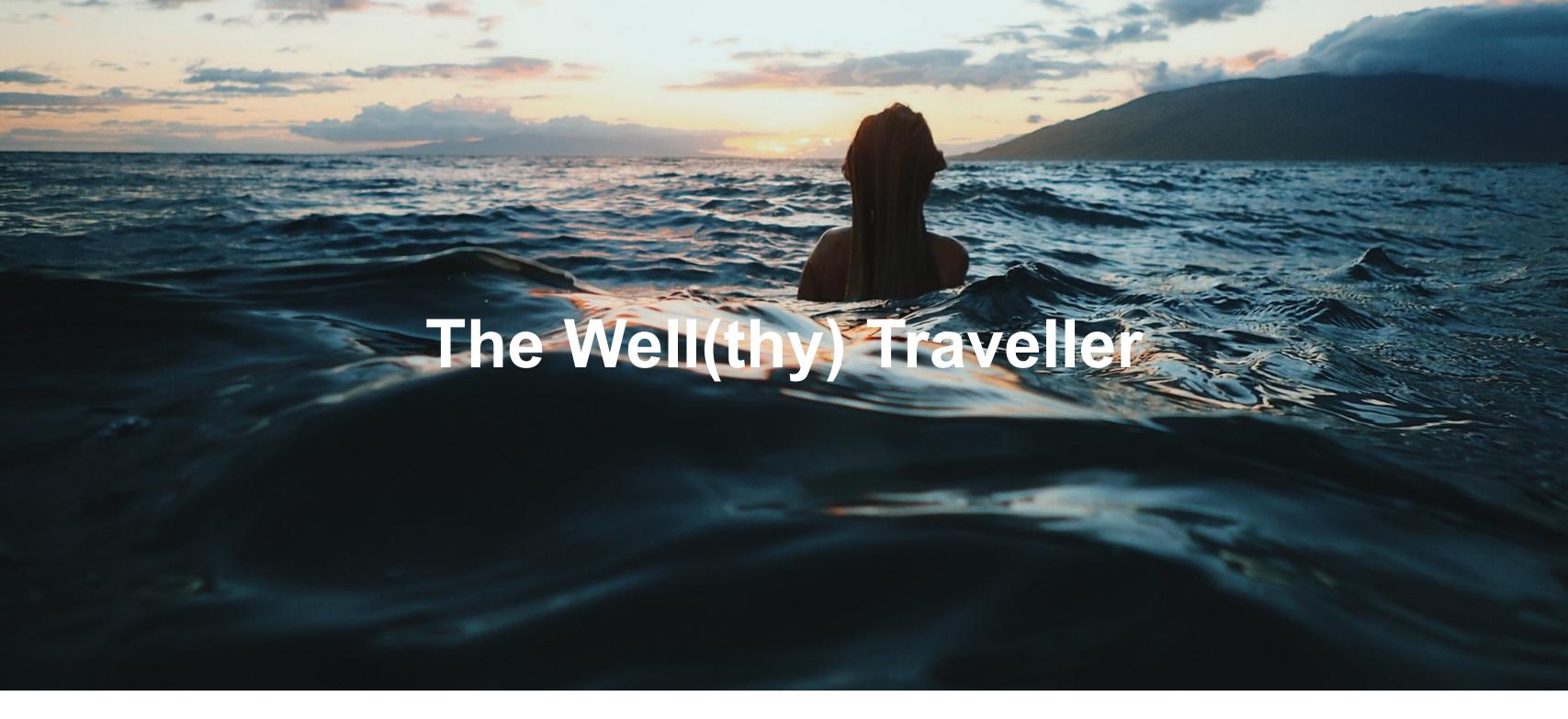
Always stimulating innovation and growth.







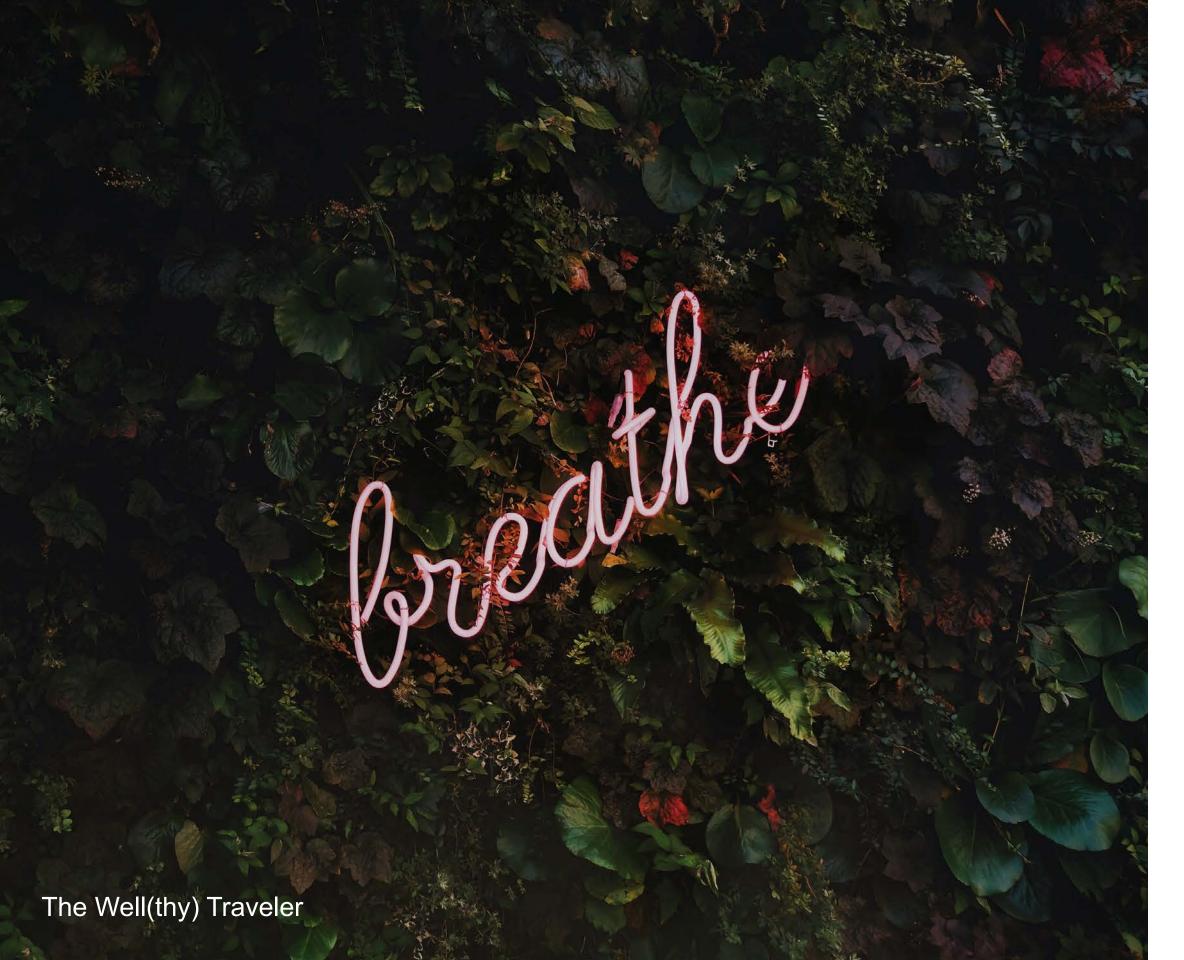




Before I dive into the four trends I will outline in this presentation, I want to very quickly take a step back and underscore the importance of this event's main theme: Wellness.

Back in the mid 2000's, when the concept of wellness first started to gain commercial traction, some stakeholders across different industries simply "brushed it off" as just another fad or fast-burning trend. That was a mistake.

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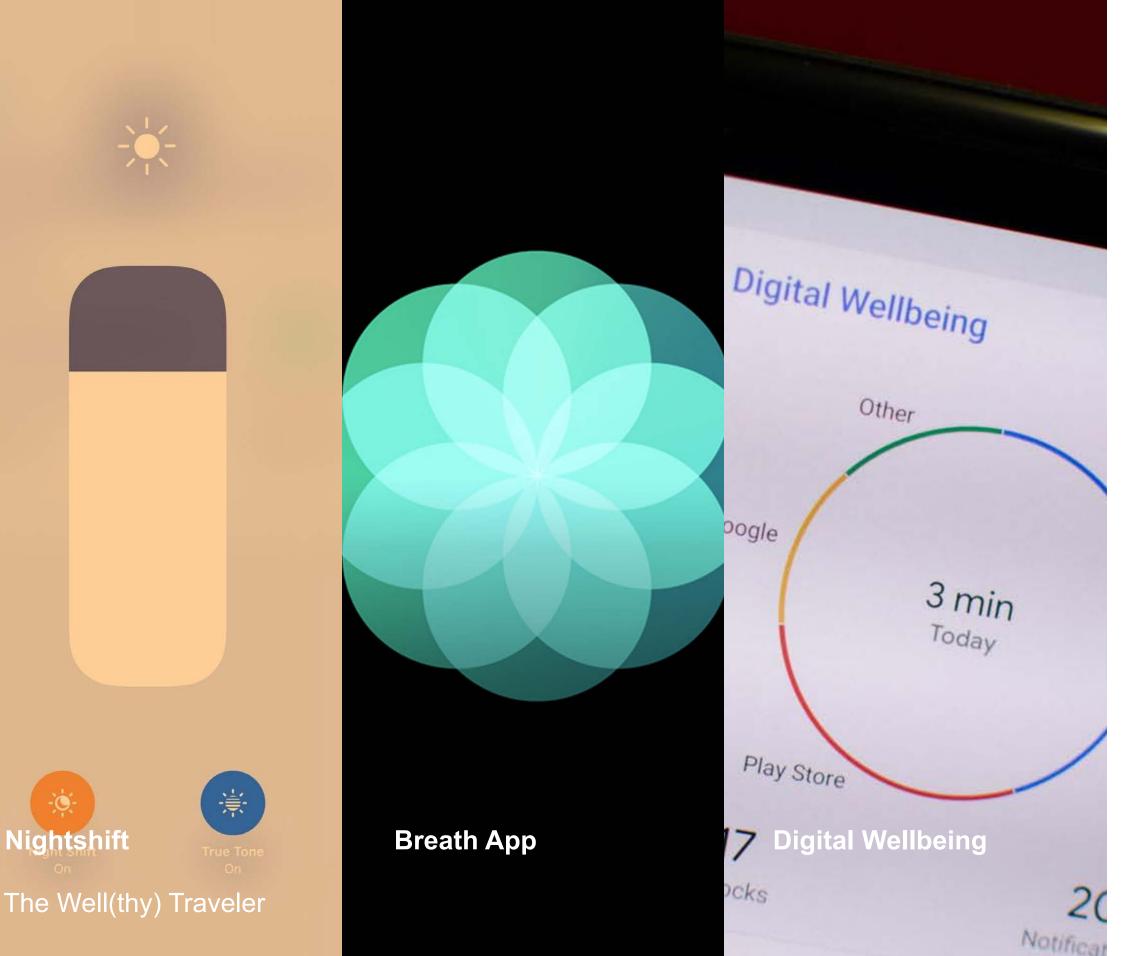


Over a decade later, and the unstoppable momentum of the wellness economy still holds rich opportunities for brands in every sector.

From retail spaces, to fashion and packaged goods, hints of this so-called "trend", can now be seen throughout the offerings of most major global brands.



Consumer's desire for wellness experiences is one of the reasons why we are seeing such a huge rise in self-care rituals and beauty products that promote mental wellbeing.



Nightshift

Also, It is not a coincidence that both Google and Apple are putting so much effort in developing wellness tools such as:

Night Shift, which aims to promote better sleep by reducing the amount of blue light emitted by our phones.

The Breath app, that reminds you to take a minute of introspection throughout the day.

or Google's Digital Wellbeing tracker, which helps us limit the time we spend on our devices.



## Wellness that Works

And that Weight Watchers has just recently rebranded itself as "WW", and is shifting gears to focus on wellness rather than weight-loss.

By the way, WW has just launched its WW cruises.

WW



There are so many examples of wellness permeating consumer products and services that I could literally spend all day talking about them.

What all of these brands have clearly understood is the fundamental importance of wellness in today's world.

In the face of faster lifestyles, longer lifespans, stress, and general unhappiness, wellness is becoming essential to modern life.

These brands are simply tapping into their consumer's subconscious desires.



And the message I want to get across to you today is that wellness is not "just a trend".

It is a very real, and more importantly — profitable — human need.

According to the Global Wellness Institute, catering to this need now represents a massive \$3.7tn industry.

## in 2017, Latin American consumers spent 34.8 billion dollars in wellness tourism

GWI, 2018

And as it relates to the travel industry, the concept of wellness continues to be incredibly fruitful.

That's because wellness travellers are typically more affluent, educated, well-traveled, and willing to try out novel experiences.

Just in Latin America, in 2017 consumers spent 34.8 billion dollars in wellness tourism, and that figure is forecasted to continue growing at a healthy pace over the next few years.

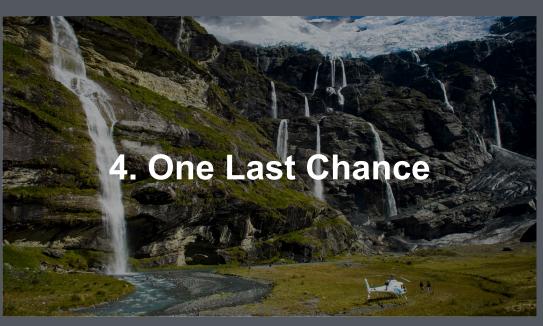


So, today I will show you how savvy travel brands are tapping into this opportunity in many innovative, — and often unexpected — ways.





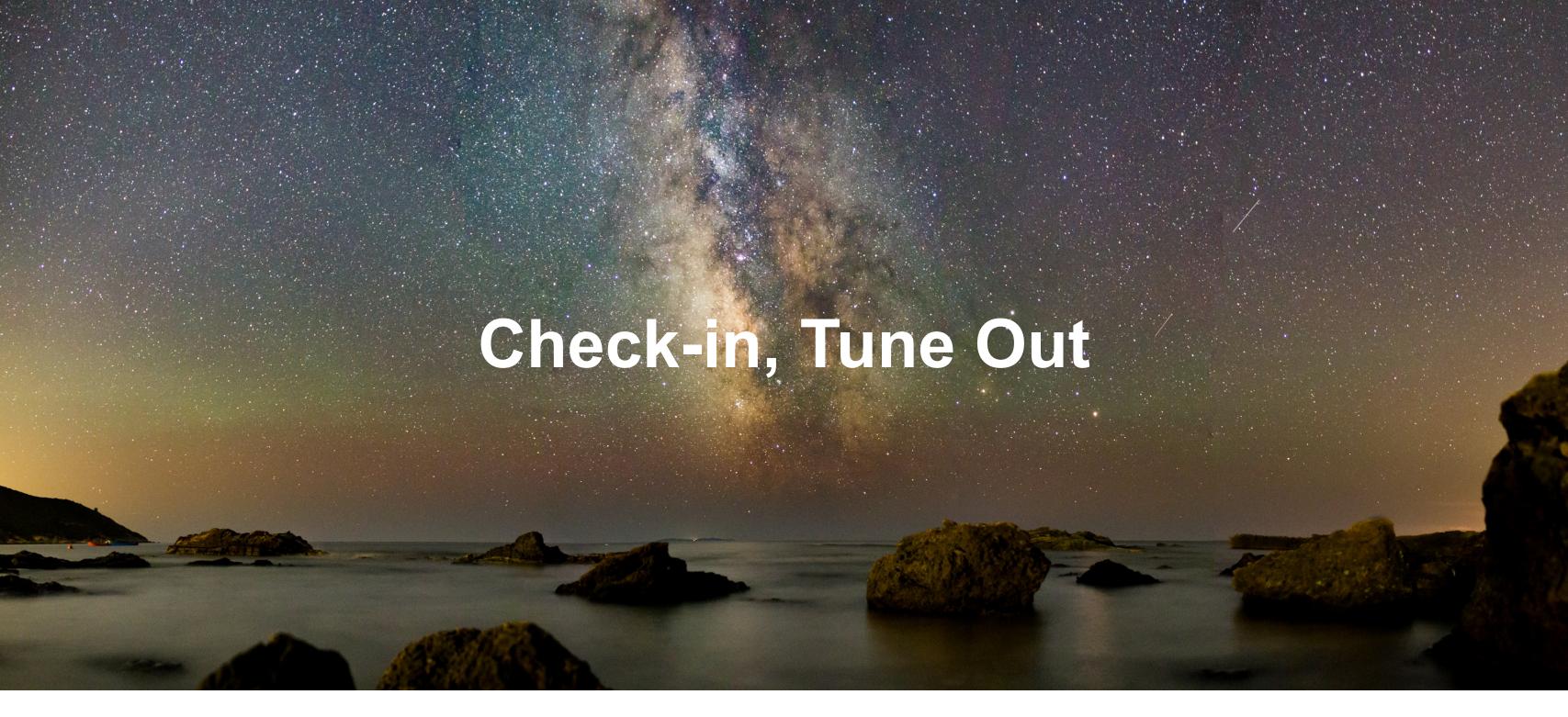




Wellness for the travel industry is maturing into something that goes way beyond your traditional spas and beauty treatments.

I will show you such innovations throughout the 4 key opportunities I want to tackle in today's presentation.

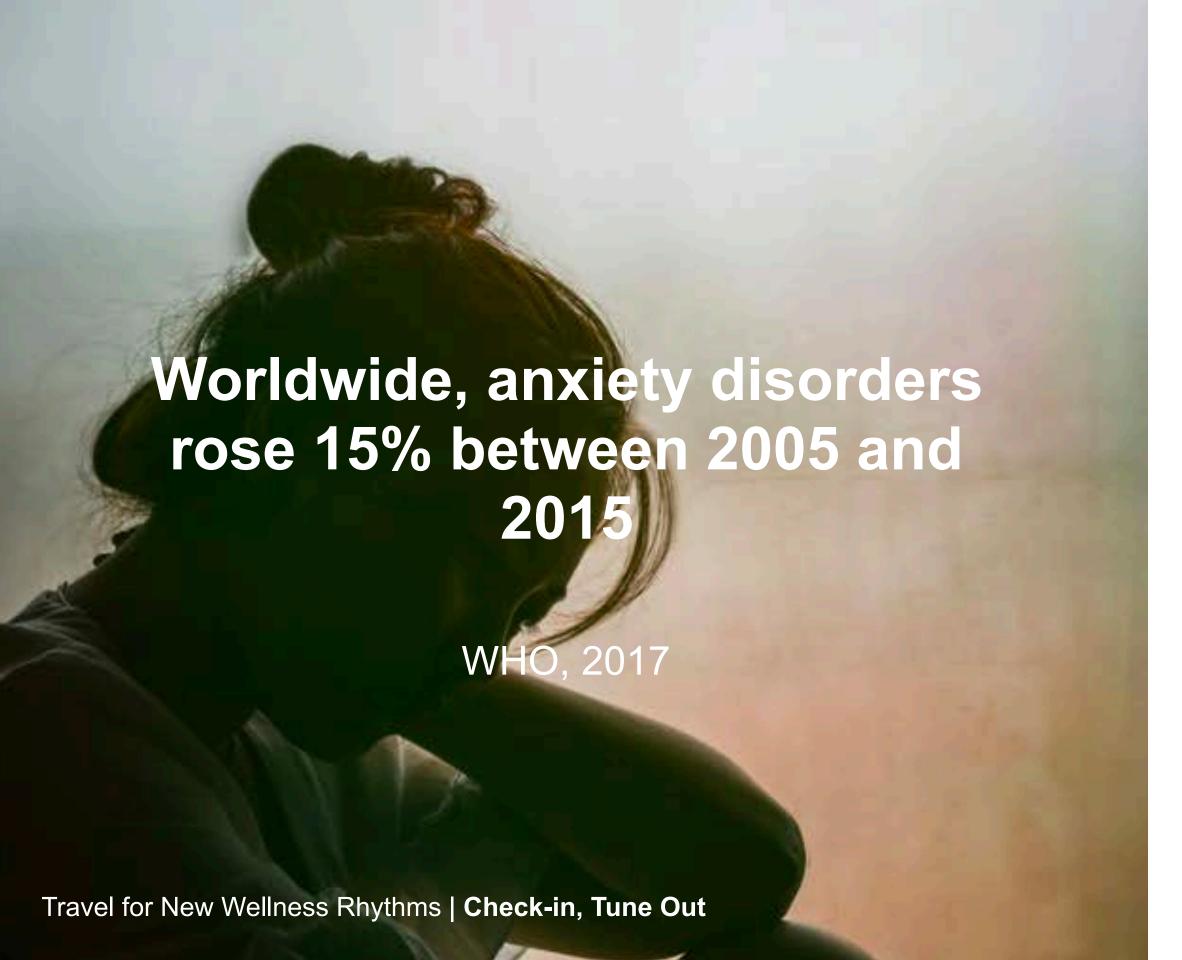
Though these are not the only trends impacting your industry, we chose these four trends because we believe them to be highly applicable to the Latin American luxury market. (Which the main focus today.)



Though technology and automation have, *in some ways*, made our lives easier, they also made the world a lot more obnoxious.

Rather than freeing up some time for leisure activities, it often feels like technology has simply allowed us to add more responsibilities to our schedules. As a result, we feel increasingly overwhelmed by our daily lives.

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As we struggle to keep pace with our always-on, hyper-connected lifestyles, mental health has become incredibly important.

According to the World Health
Organization, between 2005 and 2015,
there was a 15% rise in anxiety
disorders worldwide



In order to remediate the constant anxiety that has taken over our lives, we are seeing a growing trend towards removing sensory stimulation

Let's face it... we all need a little stillness to sit and catch our breath.



Digital detox packages are perhaps among the simplest initiatives you can implement to promote a wellness experiences for your clients.

And some hotels are putting a fun spin on their detox programs....

Take the Checkout Suite in Gothenburg's Hotel Bellora for example:

It uses a lamp from Swedish brand Skärmfri which tracks wi-fi usage, turning gradually from white to red after two hours of cumulative internet use.

Guests who were able to forgo their phones entirely during their trip received a free night's stay, with the cost progressively rising to the full price of €230 (\$261) after two hours online.

This initiative ran for one night only in February 2019

"Given this constant noise, clutter and messaging in your face, the future luxury consumer is looking for less. Quietness, reflection, mindfulness will be the new luxury items."

Julietta Dexter, CEO, The Communications Store

Julietta Dexter, CEO of The Communications Store summarised really well how this type of initiative translates to the luxury sector..

"Given this constant noise, clutter and messaging in your face, the future luxury consumer is looking for less.

Quietness, reflection, mindfulness will be the new luxury items."

I think this will make complete sense to anyone who's ever in a major urban center like São Paulo.



In today's world, silence has become a top-shelf luxury.

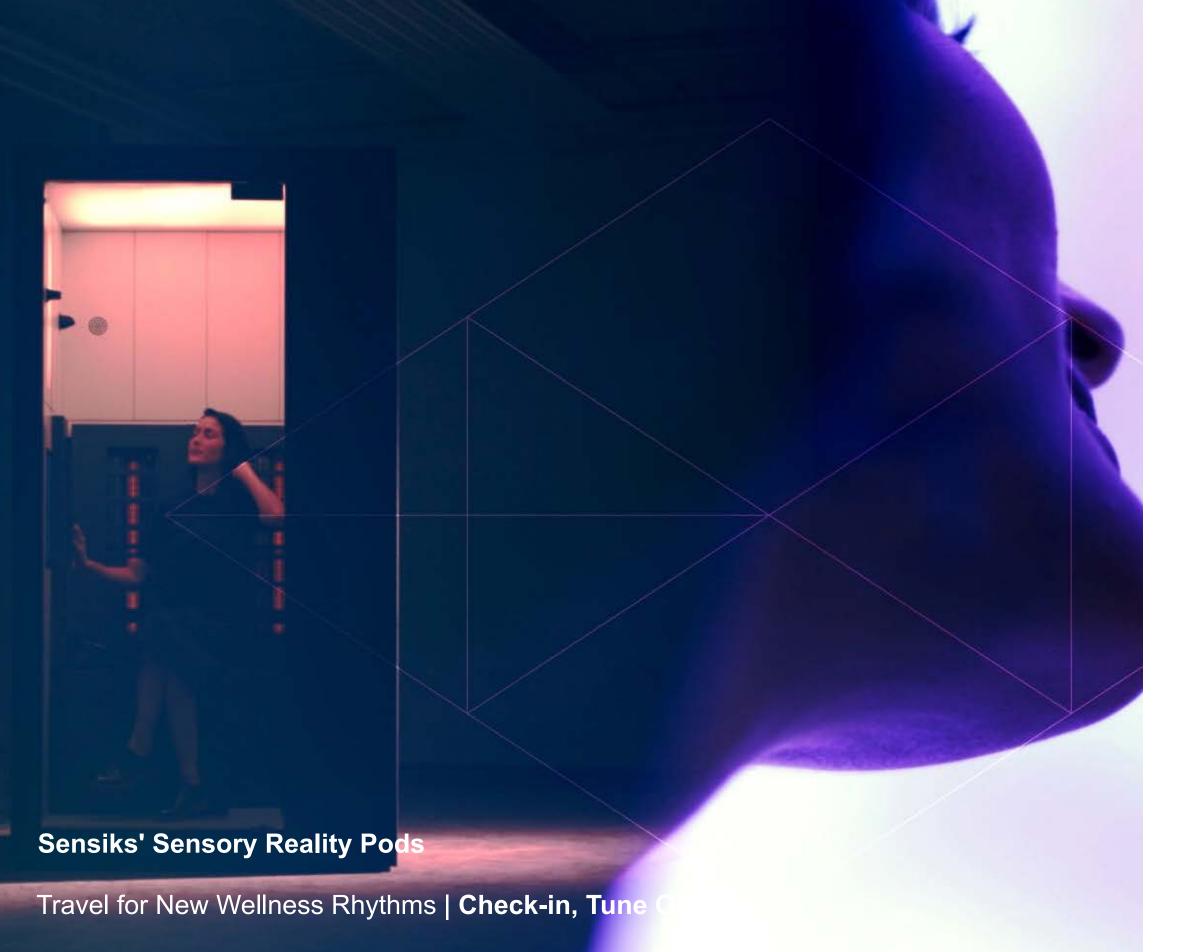
For some time now, we've been tracking a growing number of destinations that promote the absence of noise not as part of a broader spiritual message, but as a virtue in itself.

Such as the Silent Spa at Therme Laa in Austria, whose strictly no-talking policy allows for quiet introspection, and relaxation.



Though quietness may not look like such an "out-there" innovation, it is really tapping into a tangible consumer necessity.

Sensory deprivation techniques, such as floatation chambers, are emerging as an extreme way to trigger creativity and restore mental wellbeing.



And on the other end of the spectrum, multi-sensory stimulation is also being used to improve mental health.

Dutch tech start-up Sensiks' Sensory Reality Pods use audio visuals, VR, scent, temperature, air flow, vibrations, taste and light frequencies to help users de-stress, address traumatic memories, or reach euphoric states.

The wellness cabins use biometric sensors and artificial intelligence (AI) to tailor treatments based on an individual's mood or physical response.

Such devices would be a welcome addition in hotels, airports, and perhaps one day, even business class.



Agile hotel brands are also leveraging this quest for mental health as a way to explore entirely new territories.

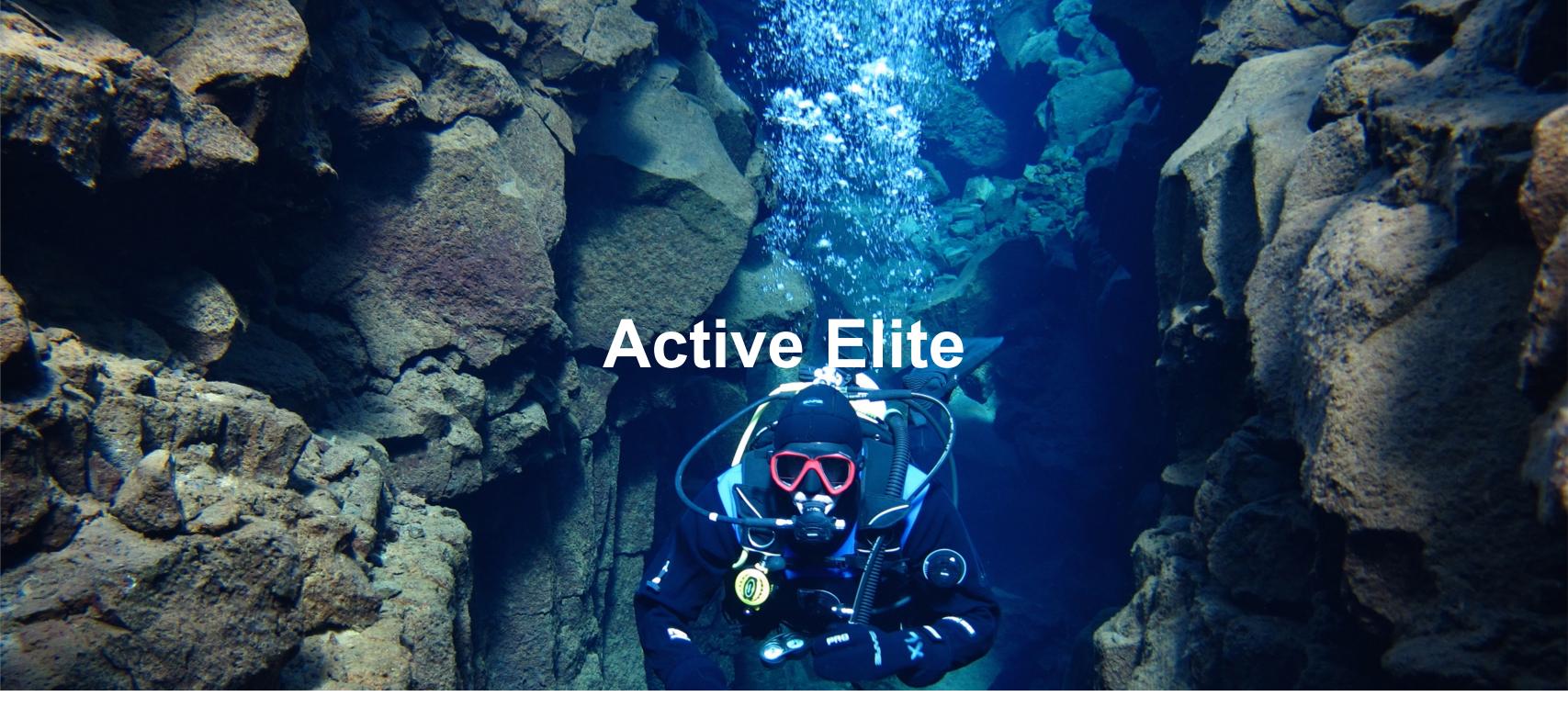
Located in the foothills of the Alps in eastern Switzerland, the Grand Resort Bad Ragaz is part holistic retreat, part medical diagnostics center.

On-site, *real doctors* examine guests for cardiovascular and neurological diseases, plus they can track their sleep through video-polysomnography.

By the end of a three-day stay, guests can discover whether their sleep woes are due to an organic sleep disorder, such as a respiratory problem, or nonorganic factors like stress.

For the latter, the property's nearly 20,000-square-foot thermal spa and sauna—complete with an herbal steam bath with Swarovski crystals—make it easy to unwind.

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While a lot luxury travel brands spend so much time and resources providing their customers with the upmost tranquility, we believe there's a huge opportunity for brands who dare to push their consumers out of their comfort zones.



Active Elite is a trend that arises partly from the huge amount of uncertainty we see in the world today, and partly from the utter lack of excitement we experience in our urban routines.

As a way to combat both, affluent consumers are looking for powerful, often uncomfortable experiences to shake up their daily lives.

From hair-raising rides and extreme sports, to extreme destinations — These wealthy thrill-seekers are desperate to feel alive again.

This points to a different form of wellness opportunity for travel brands.



We are going through some turbulent times. Economic, political and social unrest, means consumer's trust in traditional institutions is rapidly eroding.

In times of such uncertainty, it is not unusual to see consumers wanting to feel a sense of control over risk.

Its in the middle of chaos that people feel thirsty for adventures that seem big and daring



Susie Ellis, from the Global Wellness Institute, told Stylus.

"It's a reaction to stressful times. These extreme experiences are a way to truly take your mind to some other place where you are going to be mindful of what you're doing – you cannot be thinking of anything else,"

"It gives people a chance to be relieved from stress and learn how it's possible to get away mentally in ways that are rejuvenating."



And the growing popularity of theme parks validates this thrill-seeking mentality.

Attendance at the world's top 10 themepark groups increased by 4.3% between 2015 and 2016 (TEA, 2017).



Alongside thrilling rides, more and more people are choosing intense exercise formats to test their limits.

The London Marathon had record signups in 2017, with more than 40,000 applicants (ITV, 2017).



That's because as Rebecca Scott explains,

"Painful, extraordinary experiences operate as regenerative escapes from the self.

But how does all of this relate to the travel industry?



Global adventure tourism market is set to grow at a compound annual rate of 46% from 2016 to 2020

However, the criteria for adventure are changing.

Specially for younger wealthy consumers, an element of danger and the promise of exclusivity are crucial for those who prioritise out-of-the-ordinary pursuits.



And the consumer appetite for the antibanal underscores the incoming relevance of spaces with an edgier, even limit-testing outlook.

Launched in 2015 by UK travel company Global Running Adventures, the World Marathon Challenge consists of seven marathons across seven continents in seven days.

Competitors run the standard marathon distance (42.2km) in Antarctica, Africa, Australia, Asia, Europe, North America and South America, and raise money and awareness for charitable causes.



Taking an edgier route, UK travel company Untamed Borders hosted the first ski trip to Iraq. The company is renowned for offering small, private tours to war-torn, inaccessible countries such as Afghanistan and Somalia.



When it comes to accommodations for these thrill-seeking guests, luxury is all about being able to tell unique stories about their journeys.

In Peru, getting to your bed has never been such an adventure!

Would you sleep in a transparent capsule hanging off the side of a Peruvian mountain?
That's the idea behind the spectacular Skylodge Adventures Suites.

These pods are accessible only after climbing 400 meters (about 1,300 feet) of the rock face, or hiking a daring trail featuring a zip-line network.



And If you're brave enough to stay, you're treated to impressive panoramic views of the wild valley below and, at night, the Milky Way.

You will also enjoy a gourmet dinner in a circular, glass dining room pod and then enjoy a good night's sleep under the stars in your sleeping capsule (complete with its own private bathroom).

The next morning, climb back to the dinning room and enjoy a delicious breakfast with a view before zip-lining back down the mountain.



From high up to below the ground....

If you are looking for an extreme digital detox program, this just might be it.

Sala Silvermine is a one bedroom hotel that was built in what used to be the largest Silvermine in Sweden.
The room sits 500ft (152 meters) underground — so absolutely no cellphone signal down there...

The only means of communication with the outside world is an intercom that can be used to contact a staff member that stands on call and at the ready throughout the stay.

The suite is furnished with a luxurious double bed, champagne and, of course, silver furnishings.

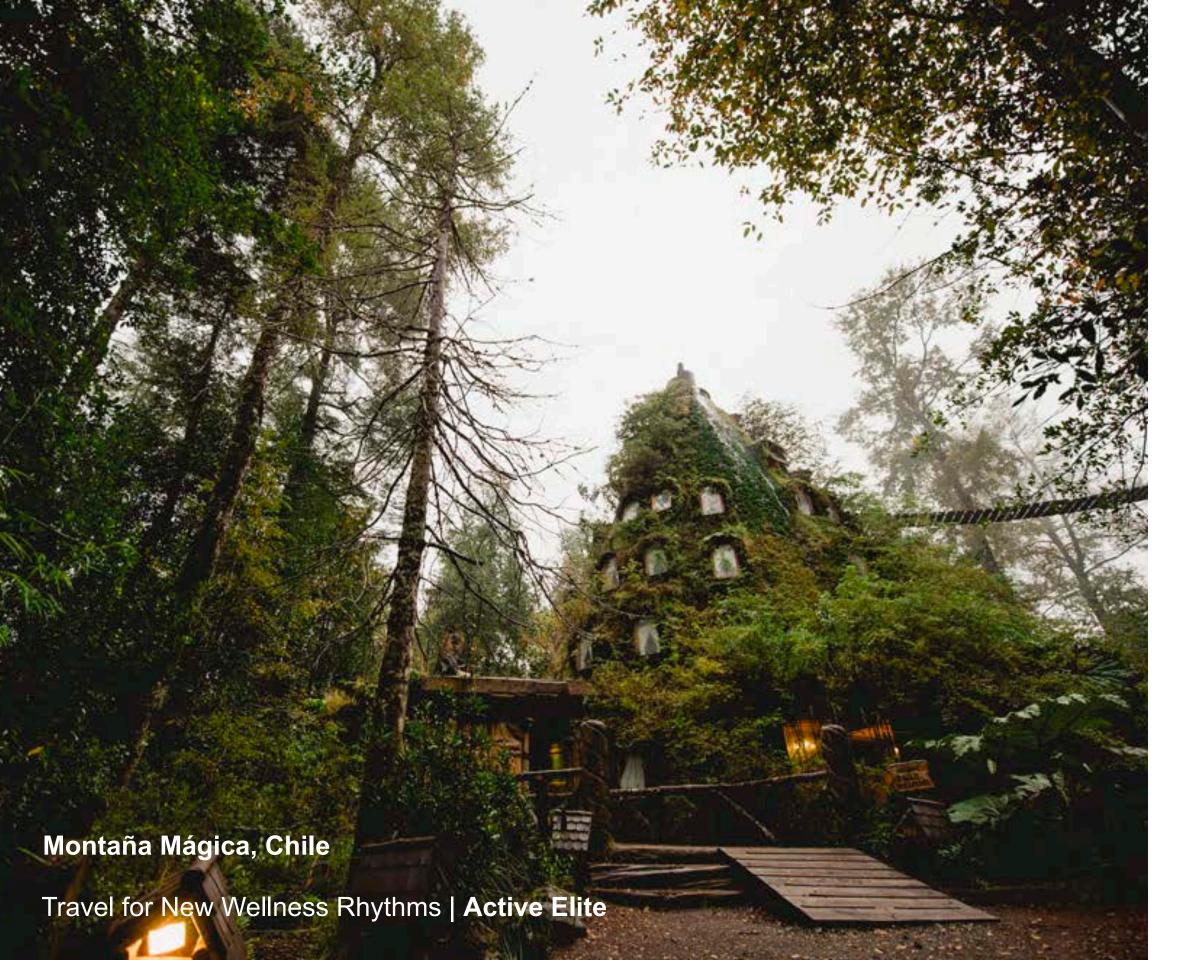


Consumer's desire to engage in unique experiences means good business for the latin American tourism market.

Latam is absolutely filled with unusual, "out-of this world" destinations.

Such as Palácio de Sal in the Uyuni salt flats in Bolivia, where the entire hotel is made of salt —

Just know that the staff strongly discourage guests from licking the walls...



Or Montaña Mágica, A other-worldly hotel in the heart of the Chilean rainforest.

It was built to resemble a volcano, and even 'erupts', sending water cascading down the outside of the lush moss and vine-covered exterior.



And to prove that extreme accommodations can definitely maintain a sense of luxury, the 5-star Entre Cielos offers rooms floating above a vineyard with views of the Andes Mountains,



...and Azulik's mind-blowing tree-huts in Tulum, will show you how Tarzan would have slept if he was extremely rich.



Going beyond the desire for experiential vacations, today's luxury travellers crave intentional journeys that enable them to stretch and grow intellectually, emotionally and spiritually.

The desire for transformation – and even transcendence – is motivating these travellers to infuse their journeys with self-growth opportunities.





As Filip boyen, CEO of small luxury hotels of the world said...

Self-actualisation is a trend whereby our luxury guests who possess so much, now seek experiences that tell a story about 'Who I Am'



The quest for self knowledge can be aided by modern technology.

London travel start-up Travel Unwrapped creates custom journeys for clients based on their DNA.

A world map of genetically relevant (and often surprising) countries is created, and then subsequently designed into a trip itinerary.

Travellers can even opt to be accompanied by a genealogist.



Another pioneer of this concept is the American Transformational Travel Council (TTC)

The company provides travellers and travel outfitters with tools to encourage personal and professional growth on the road.

The company's ethos is built around the "hero's journey", — where wisdom is learned from other cultures and then implemented at home. —

As per Kurt Kutay, co founder of TTC, We're at a point where the planet needs a higher consciousness, and transformational travel can give us that,"



Transformative tourism is being influenced by modern mysticism with a touch of hedonism...

Set deep in the Mayan Jungle, Azulik En Tulum is an unusual temple of self-knowledge and millenar teachings.



In Azulik's "Dome" guests can recover the teachings of the ancestral Mayan wisdom in order to heal their bodies, minds and souls..

Through sacred ceremonies, such as cacao or temazcal meditation sessions and yoga classes, guests can connect with native world vision that guides them towards mental peace and the harmony.



Their wellness packages are real journeys of introspection.

At the top of the pyramid of Coba, a native shaman and massage therapists can help guests experience a traditional pre-hispanic spiritual ritual, and abandon all worries and burdens in the exquisite place...



In Peru, Willka T'ika is not just a wellness retreat, it's a spiritual program offered once a year, and is especially designed for the single woman and male traveler, couples and friends who are looking for the ultimate Sacred Valley experience in the company of like-minded travellers.

The experiences include: Guided meditations in the Chakra Gardens, walks in the neighbouring Quechua community, chakra dance sessions, and even coca leaf readings with an authentic pakko — an andean healer.



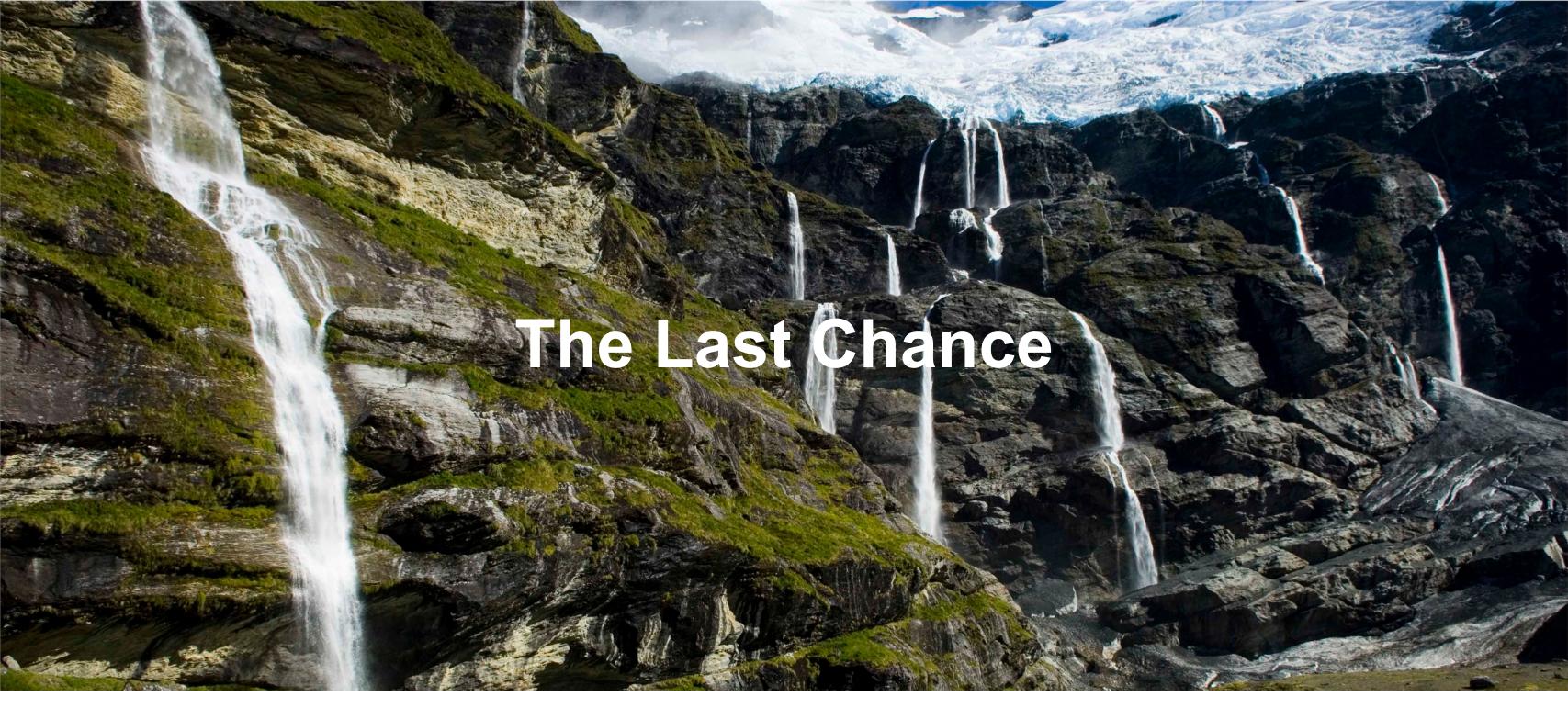
In this ongoing quest for self actualisation, some consumers are taking a more hedonistic approach and experimenting with mind-altering substances that can help them achieve higher levels of consciousness.



Located in Costa Rica, Rythmia is a Luxury Life Advancement center that celebrities such as Kelly Slater, Michelle Rodriguez and Graham Hancock swear by. There, spiritual healing, intellectual stimulation, physical wellness, and luxuriating in nature all take place in lush, large, highly private surroundings punctuated by a cooling, soothing swimming pool.

And of course, guests can schedule their Ayahuasca journeys right there.

The gracious staff are always on hand to ensure your experience is nothing short of wonderful.



Finally, to finish up todays presentation, the last trend I will cover today is all about Nature. It looks like we are finally realising that the natural environment is our most valuable possession.

Nature really is where our connection to the planet and all living things makes sense.



As climate change progresses, many natural landscapes are becoming more vulnerable, and a sense of urgency is driving eco-conscious travellers to see them now before they disappear.

Tapping into the wellness opportunity, nature is being leveraged by hospitality brands as a sensorial and calming medicine to our frenetic, fast-paced living.



The effects of nature on our health and general sense of wellness are so great that Nature is being medicalised.

A good example of this concept comes from Scotland's National Health Service, which has introduced "nature prescriptions" for issues including high blood pressure and depression.



But in the "not-so-distant" past, travel companies have benefited from nature without giving much thought to their impact on the environment. Often sacrificing nature in name of higher profits.

Going forward, must consider a fundamental rule:

Luxury does not have to be wasteful.

It is about time that luxury travel brands extend their "no compromise" attitude to the environment as well.



Launched in 2017 by luxury travel expert Juliet Kinsman (co-founder of hotelbooking service Mr & Mrs Smith), Bouteco is an eco-travel website that spotlights hotels combining luxury with sustainability.

The non-profit venture aims to publicise the "Bout-eco heroes" pioneering ecoluxe hospitality, breaking down barriers with regards to terms like 'sustainability' and 'eco'.



At the forefront of sustainability innovation, proving that the ultraluxurious design can go hand-in-hand with sustainability concerns, the Svart in Norway — which will open in 2021, will be a huge circular building resting on wooden stilts, giving a 360° view of the Svartisen glacier.

The futuristic concept is designed to be the world's first energy-positive hotel. (Which means it will produce more energy than it will consume)

Energy will be produced via over 4700 square meters of rooftop solar panels and geothermal wells.



In a similar initiative, Tierra Patagonia was established to showcase and preserve the natural beauty of Patagonia.

Along with a variety of initiatives to preserve local habitats and cultures, the lodge is supporting a reforestation campaign that seeks to plant 1,000,000 trees in Chilean Patagonia.

#### **Economic Nutrition**<sup>™</sup>

# fogo island inn

Labour 49%
Food, Room Supplies 11%
Commissions, Fees 5%
Operations, Admin 16%
Sales, Marketing 4%
Contribution to Shorefast Foundation 15%
Reinvested in the community of Fogo Island

#### **Economic Benefit Distribution**

Fogo Island 63% Canada 24% Newfoundland 7% Rest of World 6%

**Economic Nutrition** is a certification trademark of Shorefast Foundation, used under license by Shorefast Social Enterprises Inc.

But sustainability efforts don't necessarily have to be super high-tech or require a huge amount of investment.

Built on the principles of sustainability and respect for nature and culture. Fogo Island Inn is the prime example of that.

The hotel created an 'economic nutrition label' to outline how the money guests pay for a one-night stay is used by the establishment. The goal is total transparency.

Fogo Island Inn, Canada

Travel for New Wellness Rhythms | The Last Chance



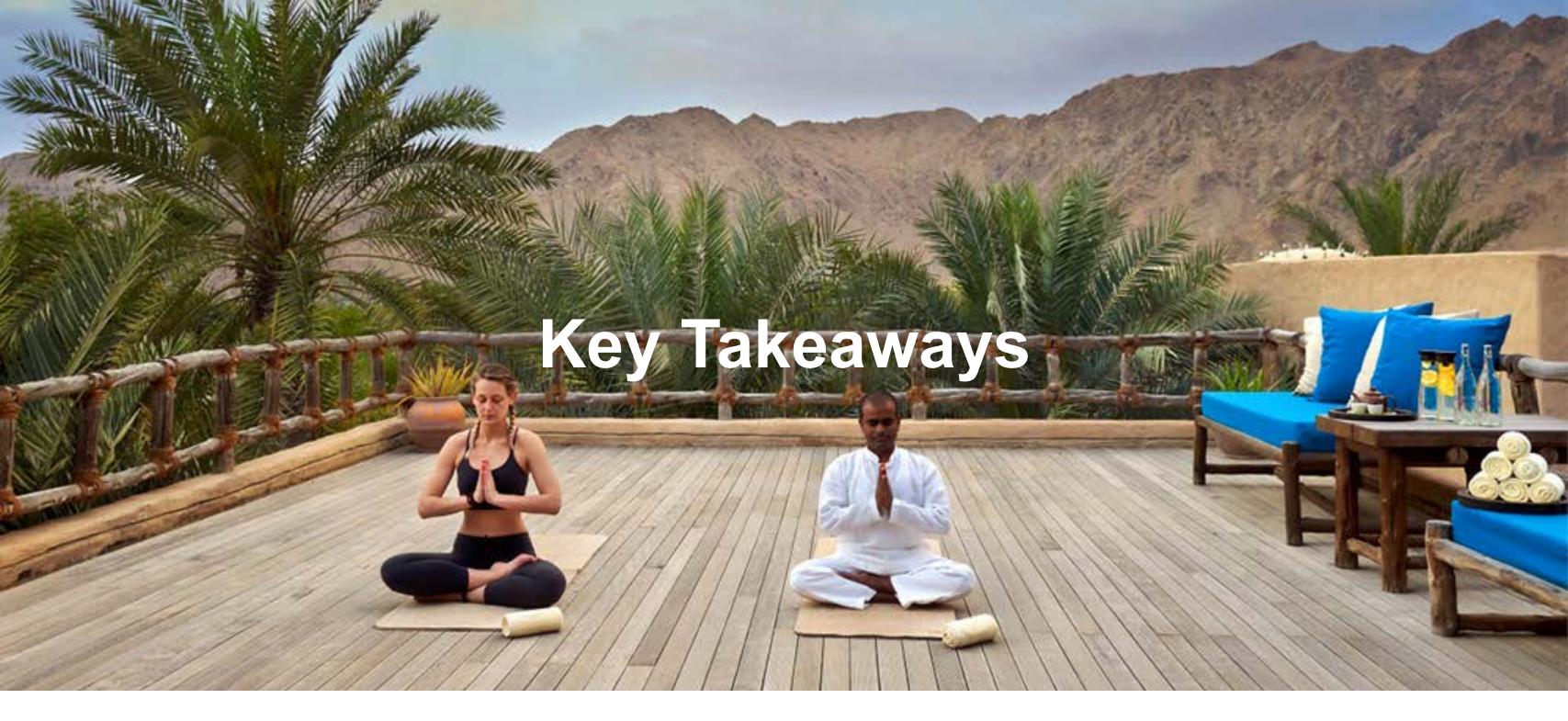
The Mashpi Lodge positions itself as a guide and guardian of nature.

It is a "Cocoon of Luxury in the clouds"

Upon arriving at Mashpi Lodge, you are entering far more than just a five-star hotel in an exquisite location: you are accessing a research station that is at the forefront of rainforest protection.

The main goal of this whole project is to bolster both the importance of research and enrich our knowledge of the lodge's surrounding ecosystem.

Further establishing its sustainable appeal, they sought to work hand-in-hand with those living in the areas surrounding the reserve, implementing an innovative program in which they, as well as Lodge employees, become shareholders in the enterprise.



#### 1. Innovate to Differentiate

As wellness gains traction across different industries, the hospitality market is flooded with competition. Luxurious massages and saunas will no longer impress today's wealthy consumers. To stand out in the crowded scenario, brands must think outside the box. Think of ways to innovate in this familiar scenario, with therapies that go beyond spas traditional offers, and promote mental health.



### 2. Push your guests out of their comfort zones.

High net worth individuals are looking experiences that give them a sense of control in an otherwise chaotic world. They want to feel alive again. Extreme experiences and destinations that push their limits and help these elite consumers tell unique stories about themselves, are set to succeed.



#### 3. Spiritual, cultural, and purpose-led trips are on the rise

As consumers look to add meaning to their lives, sometimes the best destination is within themselves. At the same time, we're seeing agile brands adding a hedonist spin to this spiritual pursuit. Ayahuasca, marijuana and other mind altering substances are becoming increasingly relevant for consumers who want to achieve new levels of consciousnesses.

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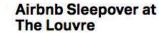
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Part of that team is specialised in the travel and hospitality sectors, and we are very proud to help companies such as Marriott, Hyatt Canyon Ranch, Rosewood, SilverSea Cruises and many more.

So if you want to know what the future of your industry holds, look no further than Stylus.











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HYUNDAI





























































# Thank you!

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