

C A R I B B E A N

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A review of the Caribbean

Health & Wellness Industry



A REVIEW OF THE CARIBBEAN HEALTH AND WELLNESS INDUSTRY

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Preamble

This report prepared by Denzil Phillips International was commissioned by Caribbean Export in February 2007. It aims to provide background documentation for the Caribbean Export sponsored health and wellness road map seminar planned for May 2007 in Jamaica. During the last 3 years Denzil Phillips International has been extensively involved in research and development in the Caribbean herbal industry, the health food sector and more recently the agro/herbal tourism and the wellness industry. All these enterprises are relatively new to the Caribbean. As a result there are very few reports, even fewer statistics and only partial information upon which to prepare such a document. This rapid review has had to rely on information collected during previous visits, regional workshops and ad hoc consultations. It hence only offers a partial overview of the industry and its various sub components.

While the health and wellness industry has many interrelated components it is spas, either resort spas or day spas that act as the catalyst which drives the remaining sub components. Increasing numbers of Caribbean professionals and overseas visitors are spending time and money in spa and wellness related facilities. Both local and overseas visitors are increasingly health conscious and are seeking healthier lifestyles through more exercise, better diets and beauty care treatments.

The report is designed to indicate the potential of the sector and make recommendations as to how the Caribbean might become a global player in this industry. The region has so far been relatively slow in realising the potential of the sector. If this report and the resulting meeting in Jamaica helps to make private and public sector decision makers more aware of the potential and the pre requisites needed to make this sector thrive, then we will have achieved a lot.

We have sometimes strayed from the precise sequence outlined in the terms of reference of this contract in order to show the holistic nature of this business. We have however tried to ensure that all the key issues raised in the TORs are to still covered.

Background

Wellness tourism is the fastest growing segment of the global tourist industry. While the European wellness market is relatively mature, the North American market has achieved spectacular growth figures in recent years.

Several demographic, economic and lifestyle developments are fuelling growth. First and foremost is the ageing of

the Baby Boomers, 78 million of them in the United States alone. Already boomers represent 60 percent of the spa and wellness market. Another factor is America's fascination with fitness and alternative therapies for health maintenance and healing. These statistics tell the story. In 1997, 42 percent of Americans spent \$21 billion on non-traditional medical therapies and products.

Health, wellness and the importance of spas

The word 'spa' actually comes from the Latin 'salud per aqua' meaning 'health from water'. It is also the name of a small village near Liège in southern Belgium, near the German border, where the Romans discovered that its hot mineral springs relieved soldiers' aches and pains after long marches and battles. Europe has a very long and ancient tradition of wellness created by the Greeks and Romans whose thermal baths can still be seen today and in some places are still in use. There are hundreds of spa towns and the use of spas for medical tourism has been developed for more than 200 years. Using spa therapies as part of medical treatment became a whole science, and for centuries was taught in all major medical schools in Europe. Around these spas, a host of health and wellness support services were developed including:

- Shops and restaurants selling special diet and health foods
- Bottled water and other specialist drinks (herbal teas)
- Gardens and parks where visitors could rest and recuperate
- Trekking trails and fitness centres
- Hotels and guest houses to house the guests
- Herbal treatment centres
- Natural Medicine manufacturers
- Cosmetic formulators and suppliers
- Medical treatment centres
- Specialist training centres for the health and wellness industry
- Conference centres and cultural programmes

This spa tradition extends right through Europe especially from Germany, into Switzerland, Eastern Europe up into Scandanavia and Russia. There are literally thousands of spas and millions of people who take some form of wellness treatment each year. The former Soviet Union, for example, had 3,500 spas and 5,000 reconditioning centers, which were all administered and run by the State. Even in the US, which has a short history of spas, 57 million US adults have been to a spa in their lifetime. 32.2 million US spa goes (15% of the population) and 3.7 million Canadian spa goes (26% of the population) have been to a spa within the past 12 months.

It is these spas and the linked industries and support services that led to the creation of the health and wellness industry as we know it today.

The International Spa Association (ISPA) has defined the “ten domains of SPA” as

The Waters
 Food, Nourishment, Diet and Nutrition
 Movement, Exercise and Fitness
 Touch, Massage, and Bodywork
 Mind/Body/Spirit
 Aesthetics, Skin Care, Natural Beauty Agents
 Physical Space, Climatology, Global Ecology
 Social/Cultural Arts and Values, Spa Culture
 Management, Marketing, and Operations
 Time, Rhythm, and Cycles

This definition clearly shows the holistic nature of the industry and the interrelationship between the various segments of the health and wellness industry. Not every spa includes every domain. Spas come in many shapes, sizes, and focuses - from day spas where you can get a single treatment to destination spas where you can stay for a week or more to medical spas that treat cosmetic and chronic health problems.

Caribbean situation

The dominant wellness facility in the Caribbean is presently the resort spa. They come in all shapes and sizes, some are simple one treatment room offering a few massage treatments as well as perhaps access to a gym and fitness centre. Others are multi million dollar facilities with up to 20 cabins and a wide range of alternative treatments; Today international spa tourists expect a serious internationally recognised resort spa to include beauty and massage treatment rooms; fitness centre; meditation and/or yoga programmes; tailor made daily or weekly treatment schedules; opportunity for special diet regimes; as well as other off site wellness product offerings - walking, botanical tours etc. The most common spa services demanded in the U.S.A. in 2003:

- 84% (27.1 million) Full body massage
- 48% (15.5 million) Manicure/pedicure
- 46% (14.8 million) Facial
- 21% (6.8 million) Movement classes
- 20% (6.4 million) Body scrub or wrap
- 12% (3.9 million) Hydrotherapy

What type of spas are used? A recent Hartmann Group survey indicated that US spa goers used the following types of spas:

- 77% (24.8 million) Day spa
- 64% (20.6 million) Resort/Hotel spa
- 21% (6.8 million) Cruise ship spa
- 21% (6.8 million) Club spa
- 15% (4.8 million) Destination spa
- 13% (4.2 million) Mineral springs spa
- 12% (3.9 million) Medical Spa

Wellness travel

It is clear from the above definition that a spa is much more than a treatment complex and embraces the whole concept of “wellness”. Wellness Travel is the term used to describe those interested in a travel experience that combines a sense of health and well-being. It’s about traveling to a destination primarily for relaxation, rejuvenation, to restore lost energy, kick-start a healthy living lifestyle, or to find inspiration by connecting with nature. It may be a trip to discover the simple art of pampering or taking care of oneself, or the luxury of getting to know the inner-self.

The University of Berne’s Research Institute for Leisure and Tourism, defines wellness tourism as ‘the sum of all the relationships and phenomena resulting from a journey and residence by people whose main motivation is to preserve or promote their health.’ In that same report, the Hawaii Wellness Tourism Association offers this definition: Wellness Tourism is ‘travel with the intention of enhancing balance and harmony mentally, emotionally, physically and spiritually.’ As aging populations becomes more health conscious and more pro-active in the management of their health care, they plan vacations and holidays that incorporate a visit to a spa, a stay at a full-fledged wellness destination, a fitness adventure or an inspirational experience. This is the essence of Wellness Travel.

Market drivers in the Caribbean

What is encouraging the growth of the wellness industry in the Caribbean?

- Growing overall tourist numbers
- Growing variety of destinations
- Improved transport infrastructure
- Improved access to information (especially internet)
- Economic need to diversity tourist product
- Need to diversify the agricultural economy
- Increasing returning retirees
- Growing numbers of local professional women
- Increasing urbanisation
- Growing problem of obesity
- Growing middle class population

- Increasing globalisation of fashion trends
- Increasing travel by Caribbean residents abroad

What are the very latest wellness trends?

An international conference held in 2002 on spa and wellness trends reported that:

- Spa goers are drawn to indigenous treatments and products, especially when travelling
- Non spa goers are similarly drawn to indigenous products
- The evolution of spa going men boosts demand for spa products and services designed specifically with men in mind
- The demand for gender-specific products, especially male-only products, is strong
- Customers desire experiences customized to their personal needs and desires
- Products are increasingly sought online
- Mothers desire products and experiences designed for them and their babies

Spafinders 2005 predictions for the ten latest trends include:

1. Spa Design Comes Home

Wellness accessories for household use. Home fitness centres.

2. Live at the Spa, Literally

Creation of holiday home complexes with built in luxury spas such as the newly developed facility in Grenada.

3. Luxury Becomes Ultra-Luxury

Spas are going up-market. Sandy Lane has invested more than 2 million.

4. Spas go Mobile

Home service. This is already popular in the Caribbean but will grow especially fast in this island market.

5. Spa-Goers Become Spa "Goal-ers"

Going to a spa becomes a status symbol and hence all the luxury goods that go with attending a spa also form part of this trend.

6. Spa Travel Virtually booms Online

The growth of not only bookings but also information about health and wellness in general has been growing very rapidly as has pre-travel consultations and "check ups".

7. Spa Rx, A Prescription for a Kinder, Gentler Medical Experience

Toning down the white jacket and clinical look and making the experience more relaxed.

8. Stay Spas Continue to "Go Exotic" While Day Spas Get "Back to Basics"

The demand for exotic tropical locations and images and the development of simple traditional structures.

9. Spa Cuisine Served up for Mass Consumption

Spa foods are now becoming used as health foods OUTSIDE the spa. This will drive the growth in demand for Caribbean Health foods and development of special Caribbean dietary supplements.

10. Eco spas Thrive

Eco spa and agro tourism links are growing right across the globe. People want more than sitting in a cubicle.

Please note that all these trends indicate that the development of local spas using local cultural heritage, art, staff and treatments set in tropical surroundings are what the market wants!



The Caribbean In A Global Context

The Caribbean is a late comer to the global health and wellness industry. It is important that if it is to catch up with the competition that it learns as much as it can from its competitors and develops a USP (Unique Selling Point) which it can share with both its local residents and visitors from abroad.

A review of some of the web sites listed in the appendix to this report will show just how large and varied the global wellness industry is. Please note the rather limited coverage on the Caribbean. In order to see the Caribbean in the context of the global health and wellness industry, a brief review of the other global destinations are outlined below.

Europe

Europe has the largest and most mature wellness market with hundreds of destination spas and treatments centres scattered throughout the region.(see appendix) The strong links with hospitals and treatments centres which existed in the past has to some extent hindered the growth of a

wellness industry as in the 19th century spa were associated with illness rather than health. This has changed rapidly in the last 10 years and the image of a place where white coated nurses push around their ageing guests in wheel chairs has been replaced with modern luxury relaxation areas where good looking young and middle aged women and men are to be found. Europe has so many spa traditions to draw from:

- Scandanavia with sauna and snow
- France with Thalassotherapy
- Central Europe with its hot springs and lakes
- Greek and Roman spa towns
- Turkish and Islamic influences in Hungary, Balkans and Southern Spain

Germany accounts for the biggest share of international spa and health business, representing between 30-40 percent of total European and probably world demand. A survey conducted in 1996 indicated that some 2.3 percent of German adults aged 14 years and over are regular clients

of spas and health resorts and an additional 20.7 percent go occasionally. Given the increased reluctance of state and private medical insurance schemes to reimburse the cost of spa treatment, more and more Germans are going abroad to sample the delights of foreign spa treatment.

According to Accor, at least 20 percent of Europeans are looking for more active, health oriented holidays and would like to find some kind of health and fitness facilities integrated in their holiday resorts, or even take their holidays in a dedicated health resort.

With perhaps the exception of some of the modern wellness complexes in the Mediterranean European wellness facilities are unlikely to operate in competition with operators in the Caribbean as both the purpose and the attraction of the facilities are very different.

North America

There are nearly 11,000 day spas and more than 1,200 resort spas in the United States, and the figure is growing at just under 20% per year. The US spa industry generated \$9.7 billion in 2005, up from \$7.0 billion in 2003 with an annual average growth of 18%. There are 77 mineral springs where most of the 71 destination spas are located. While North America like the Caribbean has limited cultural tradition for spas and wellness tourism what it lacks in history it has made up with marketing and promotion. The spa industry is particularly strong in Arizona and New Mexico (Canyon Ranch is the world's largest spa), California, Hawaii and Florida. Except for Hawaii and Florida, North American spas do not really compete with the Caribbean, as weather and environment are not really similar. The US spa and wellness market is estimated to turnover just under \$9 billion, consisting of:

- Day spas : \$6.794 billion.
- Resort and hotel spas: \$2.026 billion.
- Medical spas: \$469 million.
- Club spas: \$209 million.

A recent Hartmann report of the US wellness industry can be summarised as follows:

Locations. The number of locations has doubled in number every four years. The number of locations has increased by an average of 20 percent annually over the last eight years. The Resort/hotel spa segment has been expanding faster than any other and showed a cumulative two-year increase of 143 percent in a number of locations. Mineral springs spas are also growing faster than the industry average.

Employment. The spa industry saw an 87 percent increase in the total number of employees in the past two years.

Establishment Types. Day spas continue to dominate the industry in terms of number of establishments, but resort/hotel spas are gaining ground. The resort/hotel spa group was the fastest growing sector, firmly establishing itself as the second largest segment, well ahead of club spas.

Product Trends. The Eastern/Asian influence continues to be very strong in the industry, influencing products, services and spa design. There is a strong trend towards "medical type" products and services. Food- and plant-based treatments have also gained widespread popularity. Spas are responding to the increasing interest by males by gearing services specifically to men

Consumer Trends. Many people no longer see the spa as "pampering", but as a requisite to stay healthy and look good. These consumers want simplicity in their spa experiences and are returning to more traditional spa products. Consumers' limited free time means they have less time available to spend at the spa, and the industry is designing its offerings around this trend.

Technology Trends. The industry's use of technology has advanced in the past two years. Spas have moved beyond the use of the Internet as a simple research or e-mail tool, and now report major investments in database management, integrated channel customer contact systems and marketing products/services online.

Competition From Central America, And Florida

The Caribbean coastline including the Cancun coast of Mexico, Costa Rica and Florida all have major wellness investments. Moreover by and large their cost structure is well below that of the rest of the Caribbean. As a result this region poses a direct threat of competition particularly to places like Belize and Curacao and some other locations near to mainland Latin America. The region has already formed a fledgling spa association. The recent hurricanes have badly affected the region and it will take several years before they are fully operational again.

Non ACP Caribbean

It is clear from a review of the Caribbean wellness sector that developments have generally been much faster in the non ACP Caribbean than elsewhere. Places like Curacao; St Barths; Turks and Caicos and the Virgin Islands have invested

HEALTH TOURISM IN CUBA

Patients by Country of Origin
January to October 1992

Country	No. of Patients	Percentage
Argentina	364	16.0%
Ecuador	293	12.9%
Dominican Republic	260	11.4%
Venezuela	194	8.5%
Chile	168	8.5%
Mexico	119	7.4%
Curacao	103	5.2%
Bolivia	87	4.5%
Spain	81	3.8%
Others	415	18.2%

heavily in luxury spa destinations. Although their cost structures may be higher than the ACP region there is no doubt that they have been far more successful at attracting international capital to develop their wellness business. The free flow and use of the dollar or euro as currency in these regions is a major advantage as is the free flow of goods and services to Europe or USA. A classic example is the Turks and Caicos islands which have developed a reputation worldwide for some of the most inspiring and attractive spa destinations in the world. The US territories are rapidly attracting investment in medical tourism particularly in the area of retirement villages and care of the aged.

Most of the big chains like Sandals have investments in both the ACP and non ACP Caribbean wellness sector.

Wellness Cruises

The advent and rapid development of wellness cruises is a major new development in the wellness industry. While almost all cruises liners have had basic beauty salon and fitness centres it is not until recently that purpose made wellness cruises have been developed. Companies like Steiner and Transocean have specialised in this sector. In 1994 Steiner purchased Coiffeur Transocean Ltd, another leading Beauty concession on board cruise ships, doubling the Steiner spas on board to over ninety cruise ships. Such wellness cruises offer many of the advantages of being in the Caribbean without any of the disadvantages faced with building up a land based new industry. Moreover as with all cruise tourism there is always the question of the % of revenue which is retained by the ports visited.

Canyon Ranch (the world's biggest spa) recently announced plans to build two cruise ships of its own. According to the press announcement, each ship will be equipped with amenities such as a 50,000-square-foot, state-of the-art gym; studios; a rock-climbing wall; a jogging track; 35 spa treatment rooms; and a beauty salon. In addition, they would have a health and healing centre staffed by physicians, health educators, nutritionists, exercise physiologists, physical therapists and others. It is not yet built!

Cuba

Cuba has already become a major medical tourism destination for Latin America and Spain and provides a selection of spa services at costs far below the rest of the Caribbean. Their rich natural resources, mineral springs and well-promoted traditional medicine sector is a major asset while their strong public health service with low cost nurses will help the medical tourism sector also.

Competition From Other Warm Weather Destinations

Hawaii, Seychelles & Maldives, Dubai, Thailand, Malaysia and India are all leading destinations for wellness clients seeking both good quality treatments coupled with assured good winter weather. All these destinations are spending lavish amounts of money to promote their wellness industry

Malaysia and Thailand

Malaysia and Thailand are today in many ways the king and queen of the wellness world. There are more world class facilities in these two countries than almost anywhere in the world and their treatment techniques, architecture, training and approach (their brand) is being used by spa operators all over the world. Big companies like Six Senses and Mandara spas have gone out all over the world selling the brand and the image of the tranquil oriental spa. Both countries have spent sizeable sums promoting the wellness industry both through web sites, brochures, exhibitions and conferences. At trade fairs the Thai and Malaysia stands are usually the most spectacular and crowded. Almost all modern wellness facilities use Thailand or Malaysia as their reference point for architecture, facilities and standards.

India

India has entered both the wellness and the medicinal tourism sector quite aggressively in recent years. Most of the spas have been built around either the large luxury palace hotels that have been converted by big hotel chains or have developed within the context of Ashrams, yoga and

meditation or ayurvedic treatment centres. The widespread and hugely important herbal medicine tradition, the highly competent hotel management groups like Taj, ITC and Oberoi have resulted in a rapid growth in India wellness tourist visitors. Distance from Europe and North America, the main markets, poor local infrastructure and urban and industrial pollution problems are the main constraints on the growth of the sector. India's medical tourism sector is also on the up and up, catering for Indians living abroad as well as others in South Asia looking for quality medical care at reasonable cost. Both allopathic and complementary health service care is on offer supported by excellent doctors and nurses and a thriving local pharmaceutical industry.

China

China has only recently entered the wellness market and it will be some time before they catch up with Thailand and Malaysia. But the incredible growth in the number of 5 star hotels, the rising middle class and the need to find ways to cope with rising stress in the hectic business environment means that wellness tourism for both the local and tourist market will grow rapidly. The country has all the advantages found in other Asian countries in terms of culture, history, traditional and modern medicine and low cost skilled labour. Language and problems of urban and environmental pollution pose the greatest threat to growth in this market.

Hawaii

Hawaii is one of the most exotic and attractive wellness destinations at the moment. Lying within the Pacific but as a US state this has major attractions especially for those living in the West Coast. There are many active volcanoes and hot springs, mineral baths and mud baths all with ancient traditions are being developed for the wellness industry as is the local seaweed and traditional medicine products such as Noni and Mangosteen juice.

Seychelles and Maldives

These small island countries between Africa and Asia have also carved out a specialist niche for luxury spas. The cross-cultural links between the two continents and the exceptionally clean and non-industrialised environment have resulted in the construction of many award-winning spas. These islands have virtually no local market for day spas and hardly any opportunity for major spin offs for the local economy as the local raw material base is very small indeed.

Australia / South Pacific

Queensland which is a major tourist destination especially the Barrier Reef and the Gold Coast have been quick to develop resort spas and wellness programmes with strong adventure and fitness elements. More recently New South Wales and Victoria are trying to rehabilitate their old mineral springs and other wellness centres, which had been allowed to run down in the 60s and 70s. Australia has a strong natural product industry (aromatherapy and natural cosmetics) as well as a growing Chinese and Vietnamese population who have brought their traditional medicines and spa treatment systems with them. The nearby Pacific islands offer even more exotic locations but only Fiji with its volcanic springs and Tahiti with Gauguin paintings, Tiara flowers and French lifestyle has really developed the sector. The distance from Europe and North America the main wellness tourist buyers is also a limiting factor.

Middle East and Africa

The Middle East has a long traditional spa culture, which was perfected by the Turks and spread throughout the whole of the Ottoman Empire including North Africa and southern Spain.

The traditional bath house (Hammam) has been recently upgraded and used in places like the Gulf States to create luxury spas. All the mega tourist property complexes, which are presently being built in the Gulf, particularly in Dubai, have major wellness components. Moreover the Gulf per capita consumption for cosmetics and beauty care products is one of the highest in the world.

The UAE is investing very heavily in medical tourism partly to replace the mass exodus of local people to Europe for medical treatment but also to become one of the most modern and leading centres of medical tourism in the world. A whole health City is being developed with speciality clinics and hospitals. North Africa particular in Morocco and a lesser extent Tunisia has their wellness industry on the basis of Mediterrean concepts of health and wellness with an Islamic touch. Ancient Arabic spas are now being greatly revived.

In the sub Saharan Africa it is the links with the Safari and adventure tourism that is driving the spa industry forward. South Africa and to a lesser extent Kenya and Botswana all have developed bush spas integrated into the safari experience. South Africa has a boom natural cosmetic industry, which is presently going global. Apart from these areas the only other major spa developments are the Indian Ocean islands off East Africa such as Mauritius, Seychelles and reunion.

Latin America

Except in the case of Mexico, which is the back door to California, Texas, and the Caribbean (see non ACP Caribbean) the wellness concept is not well developed in Latin America. The strong Italian influence in Argentina and the thermal springs in the Andes means that some high-class spas have been established in Chile and Argentina. Brazil and Venezuela have both become world centres for cosmetic surgery. Beauty salons, slimming and wellness centres abound in big cities like Caracas, Sao Paolo and Rio de Janeiro.

The Amazon has become the inspiration and the source of many new products and treatments. Many natural cosmetics use Brazilian ingredients. For countries like Guyana and Surinam linking up with these developments could be very interesting. On the other hand the great similarity in the environment, flora and fauna means that Brazil can be seen as a major competitor to the Caribbean in terms of raw material supply.



Sub Components Of The Wellness Industry

It is important to realise that the spa and wellness industry cannot be seen in isolation as it has many interrelated sub components. These together form an interlocking industry of large and growing importance worldwide. The diagram below is an attempt to display these linkages. A decryption of each sub sector and how they relate to each other is given below. Maximising the linkages between each sub sector is clearly the key development objective.

Resort Spa: Destination Spa

The core of the wellness industry in the Caribbean is the resort spa. The wellness industry usually distinguishes between resort and destination spas.

- Resort/hotel spas, which are located within a resort or hotel and provide spa services, fitness and wellness components, and some spa cuisine menu choices.
- Destination spas where the sole purpose is to provide guests with lifestyle improvement and health enhancement through spa services, physical fitness, a spa cuisine menu,

educational programming, and on-site accommodations.

In the Caribbean there are very few “destination spas” as even those that do exist such as Le Sport -Body Holiday offer a wide range of other activities and cater to visitors for whom the spa treatment is just an added bonus.

In Europe thermal baths and healing water sources are certainly to be considered as destination spas indeed in such places the hotel and the spa may be physically quite separate and people may travel quite a long way from where they stay to obtain treatments. In the USA huge destination spas have been developed such as Canyon Ranch in New Mexico which more than 50 treatment rooms. Demand for the destination spa, which focuses on lifestyle improvement and health enhancement, has, as its forerunner, the fat farm.

Condo Spas

For the long term vacation visitor or those seeking a retirement home in the Caribbean the condominium or serviced flats



and villa complex is an increasingly important component of the tourist economy. Visitors purchase or rent such facilities or increasingly partake in time share options. Many of these vacation property complexes include a major spa facility and some even have a spa as the central feature of the complex. Two such facilities are presently under construction in Grenada.

Day Spas

While a very large number of so called day spas are simply glorified beauty salon, the line between the two is very vague and there is no control on the use of the word day spa in the Caribbean. In most cases these centres are used by local professional women as Caribbean men are as yet still hesitant to go to such places while massage parlours are largely considered as places for sexual services as opposed to therapeutic centres

In places like Montego Bay and Bridgetown day spas have been established to cater for the tourist staying in apartments and small hotels. In some cases these centres are actually located in big hotels in others they are based in villas; Mobile spa services are also increasing for villa based tourist who like to have treatments in the privacy of their own residents. Some small hotels also provide access to many of large shopping centres in the big Caribbean towns have day spas and several beauty salons. The development of day spas

and beauty salons unlike resort or destination spas certainly favours SME local business.

Sport and Fitness centre

Such facilities are normally either urban based small businesses used by local people or hotel/resort based facilities primarily for guests . Some hotel based facilities also encourage local clients to join as members. Most if not all equipment is imported and the extent of linkages with the local economy is limited. Many of these centres however expand either vertically by adding a fully fledged spa operation or horizontally by including outdoor sport and fitness activities.

Most fitness centres offer a range of classes. Some organise mobile workshops in large offices or factory premises for company staff. Many hotels offer water gymnastics or other water or beach based fitness programmes. Jamfit a Jamaican company provides outdoor fitness classes as well as a regular television based class. With growing weight problems and lack of regular physical exercise such business are bound to grow in number throughout the Caribbean. Beach based fitness centres would appear an ideal growth sector for the Caribbean.

Some hotels have jogging tracks paths either within or nearby to the resort some along the beach. The development of

outdoor fitness facilities and programmes within and nearby to resorts offers considerable opportunities

Beauty Salon and Beauty Farms

Caribbean women are rightly proud of their beauty and spend considerable amounts of money and time on it; Beauty salons, hair salons, manicure centres abound in most of the urban centres catering for the middle class professional women. This is especially true in Port of Spain, Kingston, Santa Domingo, Fort de France, Bridgetown and Castries, while the majority of such centres generally offer a rather limited palette of treatments some employ trained aestheticians and a full range of body and facial care services. The limited number of qualified aestheticians has limited the growth and expansion of the quality end of this market. Almost all the products used are imported; many used US made products specially designed for Black American people.

Slimming: Dietetics, Detox and Drug Rehabilitation

The growth of specialised medical and paramedical facilities to help cure social diseases such as obesity, anorexia, alcohol and drug abuse is one of the key sub components of health tourism. Some of these facilities are publicly run but most are private or perhaps charities. All such centres require trained nurses and access to doctors but also include wellness, good health food; fitness and exercise regimes; peace and quiet. Many are secret and guest list is anonymous. Some such centres in places like India have regimes built around traditional medicine and healing practice. Most are residential but some day centres also exist in big cities. The Betty Ford Foundation has a series of such luxury clinics with fully-fledged resort facilities.

The Caribbean with its excellent tradition of nursing care; good climate and isolated island geography offer good opportunities for such developments but lack of strong medical infrastructures are a major constraint

Health and Medical Tourism

Whether travelling to a spa for some serious rest and relaxation or flying somewhere to seek non-traditional medical therapies, cosmetic surgery or diagnostic testing, a multitude of people can be classified as health tourists. Most health tourism today focuses on two areas: pampering and wellness. Pampering involves offering people an experience that makes them feel good-services such as massages, herbal wraps and exfoliating scrubs. Wellness involves helping healthy people prevent problems so they stay well,

both physically and mentally. Sometimes this means offering diagnostic testing to identify potential problems. More often, guests who have self-identified concerns are taught how to relieve stress, change eating habits, reduce the likelihood of sports injuries or improve their sex lives.

The “classic” form of health tourism, largely pioneered in countries like India and the Philippines is a hospital and medical clinic based service to undertake a wide range of surgery operations which are either very expensive to obtain or where there are long waiting lists to obtain space. Over 200,000 foreigners already having received treatment in the country since the opening of the Philippine Medical Tourism Programme in 2002. The Philippines offer special tourist packages which include a medical check up or even surgery!

Cosmetic surgery is the “softest” form but medical tourism includes cataract and other minor eye operations, hip and other bone replacements and even such things as kidney transplants. High quality service at low cost, excellent after care and rehabilitation facilities and anonymity are the key to success. Countries like Poland, Czech Republic, Venezuela and the U.S.A. have built strong reputations for cosmetic surgery while India, Philippines, Singapore and Dubai offer a full range of medical facilities. In the Caribbean, Cuba is poised to become a major centre while Trinidad and Jamaica have made significant investments to attract medical tourist visitors.

One percent or 247,000 international visitors to the United States come for medical treatment by 2000 while Costa Rica attracts 150,000 health tourists annually while US News On Line reported that Cuba earned \$25 million from health tourism as early as 1997.

A World Bank/PAHO report on medical tourism in the English speaking Caribbean concluded that high labour costs and poor medical support facilities did not indicate major opportunities except perhaps in the field of slimming and detox.

Traditional Healing Centres

A sub sector linked to both spas and medical tourism is the development of centres for alternative and complementary medicine. These offer low cost alternatives to western health care and use holistic approach to health and wellness, which include diet; fitness; exercise and mind body treatments. They are suited to the spa environment. Spas based on Chinese, Ayurvedic or Tibetan medicine traditions have been developed in many parts of the world where meditation, yoga

and herbal baths and massage using a wide range of local plants form the centre of the treatment programme. Some efforts have been made in Barbados, Jamaica and Cuba to develop such traditional healing and wellness centres but these are all largely geared at serving the local community rather than resort-based tourist healing centres.

The baby boomer generation continues to be the most influential segment in the spa industry, and this group is demanding education and new experiences. The popularity of alternative medicine reflects this trend. For example, hydrotherapy, aromatherapy, body wraps, and "eastern" treatments, such as ayurvedic medicine, yoga and feng shui, are growing in appeal.

Developing linkages between the spas and centres of traditional knowledge and healing has yet to be realised in the Caribbean. The spiritual dimension is also often lacking in most Caribbean spas while Arawak, Carib, Rasta, Maroon or Creole concepts of wellness and beauty have been largely unresearched and even less developed into a defined system of therapy.

Herbal and Botanical tours

Many wellness centres promote the importance of an understanding and respect for nature and for the plants that are used in cosmetics; perfumes and traditional healing. It would be almost impossible to envisage Thai and Indian spas without surrounding gardens and plants. The wellness industry hence promotes linkages with the development of botanical garden, medicinal plant gardens, botanical trails, traditional healing centres and products and services using local plants, trees and other natural products. These services are sometimes provided within a resort setting such as at Half Moon hotel in Jamaica has its own nature reserve and promotes tree-planting programmes on the property. Herbal and botanical tourism is often linked to heritage issues. Hope Gardens in Kingston, Chincona Gardens in the Blue Mountains were developed in colonial times. Some still have wonderful colonial houses attached. Private/public sector interaction is important to develop this type of business as planting programmes, nature conservation, footpaths and nature trails all require public regulation and support.

Herbal trekking has been well developed in Peru, Costa Rica, Mexico and the Amazon but has great potential for expansion in places like Jamaica; Guyana, Surinam and Tobago. Belize is almost certainly the most developed country in this segment of the business. The sector also brings opportunities for local tourists as well as school educational tours. Merchandising of the products in or around the gardens is important to reap

the full value added potential. Spice and herbs in retail packs; Live potted plants; Exotic seeds; Botanical books and videos; Postcards and calendars; Natural craft objectives; Essential oils; soaps; cosmetics; health foods and drinks.

Adventure tours

Sometimes linked to sport and fitness are companies that offer outdoor adventure sports such as hiking tours; cycling; canoeing . In Europe and U.S.A. there are in addition all the winter sports. This is a very rapidly growing sector closely linked to the wellness industry. In some Caribbean countries like Dominica, Guyana and Belize, adventure tourism is the key growth sector. These can also be sold under the wellness banner particularly herbal and botanical tours (see above). Other related activities are camping and trekking to visit local ancient monuments. Local walking tours, short treks or mountain biking is also ideal in combination with indoor fitness programmes.

A recent article on "spa trekking" in Spavox magazine indicated that worldwide there are a growing number of hotels operating in this field. For example, Barnard Harbour in Vancouver, Canada includes guided activities include sea kayaking, hiking, wildlife observation and fly-fishing as well as a major resort spa. The combination of challenging natural pursuits and luxurious spa treatments has gained this spa many awards. Spa treatments take their inspiration from the nature and geography all around the lodge." Ease your hiking aches with Raindrop Therapy, where ten different essential oils are dripped over your body and massaged in, or "Canadian Shield!" a combination of treatments designed to focus on soothing sore backs and necks" states the web brochure.

Safari spas are also of growing interest in Africa and India. These could well be developed in Guyana or Surinam For example Witwater Safari Lodge in South Africa includes local made village housing within the safari park. These traditional structures are linked with wooden walkways but inside, they are all equipped with a steam shower or spa bath. After a dusty day in the jeep, spotting nature's most magnificent creatures including rhino and cheetah, there are plenty of indulgent spa treatments at the Witwater "Wellness in the Wilderness" spa. Massages, hot stone treatments and wraps - there will be something for every day of your stay here. Their signature treatment stimulates the muscles of the back and neck - perfect.



Spa And Wellness Links With The Local Economy And Environment

Thermal baths, healing water sources, salts and mineral springs

The heart of the European wellness industry especially in Switzerland; Germany centres around the use of thermal waters, salts and mineral springs for post operative care and treatment centres for various ailments such as TB; bronchitis arthritis and the like. The Kur (or taking the waters - literally drinking the waters) was an established part of European social life in the 19th Century where towns like Baden Baden, Evian; Marienbad attracting kings, queens, aristocrats and business tycoons from all over Europe.

An important aspect of the growth of these spa towns is the public private sector partnership. Without close collaboration between the local government and industry these would not have boomed. Many of the actual thermal baths are publicly owned while visitors stay in privately owned hotels, resorts and villas and take daily treatment in these large public facilities. In a place like Budapest the whole family will go to a thermal bath house for a Sunday outing. Similar use of

volcanic steam and thermal waters exist in Japan where public baths and thermal treatment centres are imbedded deeply in the culture and in the system of traditional medicine.

This type of thermal treatment centres hardly exist in the Caribbean although in colonial times some thermal springs like Milk River and Bath were developed in Jamaica and also in Nevis; Most of these facilities which are in public hands. Some thermal springs are been developed as wellness centres in Dominica and Belize but the author is not aware of even a complete geological survey of the thermal sites that exist in the Caribbean let alone chemical analysis of the waters, mud and salts of the region.

Thalassotherapy and Sea Water Treatments

Another specifically European development involves Thalassotherapy based on the use of seawater, sea muds, algae, sands and salts. This is especially important in France (Brittany) but can also be found in places like the Dead Sea and Hawaii.

Dead Sea mud and salt is now exported all over the world for use in cosmetics and skin care products; Similar mineral rich muds and salts are found in many volcanic locations and these are increasingly being developed for wellness purposes and for the development of natural skin care and treatment products. The Caribbean is a nation of volcanic islands with muds, mineral rich sands, sea plants etc. which could be used in the wellness industry. One or two resorts have used some simple muds and minerals but none of these have been commercialised.

Plants as the inspiration for spas

There has been a considerable amount of interest in spa which focus on specific plants. The most famous are vinotherapy spas based around grapes. Caudalie in France has developed a whole range of spa products around grapes and there are a number of wine estate based spas in France as well as in Italy and South Africa. www.caudalie.com. To develop a spa concept around a Caribbean plant like banana or brown sugar would pose an exciting challenge for a spa designer

There is much work to be done to develop spa facilities integrated into agro-tourism projects

The Caribbean has a strong history of traditional medicine based upon herbal treatment. These include: Aloes, Nutmeg, Pimento Leaf, Sorrel, Soursop, Vetiver. Caribbean plant materials are also used increasingly on the skin for cosmetic purposes and for the growing spa industry including body decoration, cleansing and conditioning, fragrances, insect repellents, moisturizers and lotions, mouth and teeth cleaning, sunscreens and skin protect ants. There is an important opportunity to link the growing spa, holistic health and well-being sector, with the exotic herbs and essential oils from the Caribbean. Such a connection can produce a number of important competitive advantages for Caribbean spa suppliers.

Functional foods and health foods

The US market for Organic Foods/Beverages is estimated at: \$12.8 billion and is growing at 17%. According to Nutrition Business Journal in 2005. The Natural Foods/Beverages market is \$12.4 billion (11% growth). In comparison the annual growth rate among conventional grocery stores is 4.6%. Comparatively, the health and wellness industry's growth is quite remarkable. Research and development into the production and processing of a range of health foods and dietary regimes based on local raw materials has hardly begun in the Caribbean although products like Barbados Cherry (Acerola), Soursop, Arrowroot and Yam are being developed in other parts of the world for such purposes.

Resort wellness centres offer a major market for local health and organic foods. Many spas now have special dietary regimes and also include health food bars or health food restaurants in their complexes.

Caribbean diets and Culinary experiences

At last year's sustainable tourism conference Andrew Dumaine, a tourism expert, stated "The Caribbean is uniquely positioned to meet the demand and use alternative tourism models to build a healthier future for residents and visitors alike". Dumaine furthermore mentioned that "The region's food, with its strong ties to family, tradition, culture and memory, provides many soul-stirring points of connection." Developing of specialist health food restaurants, juice bars and health food festivals will go a long way to support the resort spa experience.

Natural Beauty Care products

The US Natural/Organic Personal Care is estimated at \$4.9 billion and is growing at around 22%. The EU market is nearly double that figure and is also growing much faster than the conventional beauty care market. Professional beauty care products are often the most profitable and interesting market segment to develop. At present almost all spas in the Caribbean use imported products and supplies for not only their spa treatments but also the spa shop. The spa shops are some of the most important marketing outlets in this sector. A number of local companies have begun to develop a range of natural beauty care products (Starfish Oils, Blue Mountain Aromatics, Earth Mother Botanicals, Natmed, Herbarium) but Ligne St Barths is the only Caribbean company to date that has penetrated the international spa market in a serious way. Increased demand for local products will increase demand for the raw materials that go into making these inputs.

Spa Architecture

Obviously the construction of new resort spas can provide income and employment for local architects and builders. The more a local style of facility is developed the more local raw material will be demanded. To date very few spas or wellness facilities in the Caribbean have been designed by local architects and few use many local materials.

While European Thai, Indian and even Arabic architectural traditions have been widely used in the Caribbean it is clear from the above picture which is of a spa near Cancun that local architecture can form the basis of spectacular facilities.

« At the XQUENDA Huatulco Spa Temascalero, we are



practicing this in a resort because busy people don't have the time or the idea to go to the mountains, but I can introduce the experience to them here." just as I was first introduced to this truly ancient, mystic, but scientifically proven healing experience in Huatulco, Oaxaca on Mexico's southern pacific coast. » Juan Pinela, Spa Manager Xquenda.

Wellness Interiors

While almost all the specialist equipment that goes into spas and fitness centres will need to be imported from abroad the furniture, fixtures and fittings can all be made locally. Indeed the whole trend in spa design is to go local and go natural. Unlike Thailand, India or Malaysia the Caribbean has done very little to develop the interior architecture and craft fittings. These can include textile drapes, sheets, pillowcases, towelling robes, slippers as well as lighting, curtains, blinds, door fittings architraves and flooring materials. There are a host of creative talent in the Caribbean especially in the field of traditionally jewellery, basketware and leatherware. These need to be harnessed for the wellness industry. It is interesting to learn that all the sea island cotton that is grown in the Caribbean is sold in Japan to make the finest quality products which often find their way into local Japanese spas!

Wellness And Returning Emigrants

Retirement communities are perhaps the most promising initiative for the Caribbean wellness sector from the long term economic perspective. Although those islands with growing security problems will find entry into this market very difficult, in others this could be a growing market linked to the wellness sector. The target market should be younger healthy Caribbean and North American retirees who are relatively affluent. Current retirement communities in the English-speaking Caribbean represent a first wave of

interest on the part of people who are willing to take risks and experiment. Further research both with the existing retirees in the Caribbean and in the target markets is needed to understand what can and should be done to encourage growth in the market.

From Spas To Medical Tourism

As the World Bank study on Medical Tourism in the Caribbean reports, spas may offer the best possible entry point for entry into the health tourism sector. A spa with a solid reputation in fitness and simple cosmetic treatments such as mud baths and facials could, for example, decide to add specialist facial peeling treatments. Over time, the spa could move beyond these dermatological services to plastic surgery and liposculpture, gradually building health-related technological capabilities as it gained a solid reputation in the more basic technologies. On the other hand, a spa that is focused on relaxation therapies and stress reduction techniques might decide to move into counselling in smoking cessation, weight control, etc. and find demand among its clientele for more sophisticated addiction treatments.

Why Should The Caribbean Tourist Industry Invest In Spas

According to general managers or directors of operations at 30 resort-based spas in USA, spa facilities generate net operating profit of 15-25 percent, which is far higher than for pure accomodation. Among the managers surveyed, 97 percent said spas enhance or increase their marketing advantages, 83 percent said they boost revenue per occupied room and 73 percent said having a spa on site increased occupancy. Spas hence increase the profits and the occupancy rates of holiday hotels.



What Are The Keys To Developing A Caribbean Wellness Brand?

A major constraint on the development of the Caribbean wellness industry has been the lack of any clearly identifiable identity or image for the Caribbean wellness sector.

What are the key elements that make up this identity?

- Marketing and branding
- Interior design
- Treatment systems
- Exterior architecture and layout
- Environment
- Therapists
- Products
- History

History

While thermal springs and mineral baths exist in the Caribbean, the historical development of these facilities in pre-colonial times appears largely absent in the Caribbean. There are of course thermal sources in Dominica, St Lucia, Jamaica, Belize and Nevis. These received some attention in colonial times but by no means drive the industry today; many indeed are lying in a state of disrepair. The Aztecs and Amero-indians appear to have some traditional use of sources but this seems

not to have been well developed into a brand or identity even in Belize and Mexico although with the strong pottery, graphic and architectural ready for exploitation, why is this? It is necessary to look at the bathing, washing and make up traditions of the Arawaks and Caribs as well as Afro; Maroon and other later traditions. To develop the cultural context for the Caribbean wellness industry will require investigation into primarily the systems of traditional medicine used in Arawak, Carib, Amerindian as well as Negro and colonial history. This is a task that could well be commissioned to a University or trade association or even local consultants.

Environment

The physical and geographic environment in which the spa or wellness facility is housed or situated is of critical importance to developing the right feel. Obviously this is not always under the control of the sponsor. In this case, public private sector partnership is of critical importance to conserve the natural environment and the built environment. In Europe many of the great spa towns like Baden Baden, Bath are

conservation areas and attract large numbers of tourists just to visit the beautiful buildings and landscaped parks. The Pitons, Soufriere and Milk River are potentially centres of beauty and wellness that could be conserved and developed in a similar manner. Landscaping, architectural conservation, nature conservation and good street architecture are all key words in this endeavour.

Architecture

Almost all the wellness facilities in the Caribbean are designed by outsiders and use imported design concepts whether from Asia, Europe or U.S.A. Even in North America they turn to Indian culture for much of the inspiration that goes in New Mexico one of the most important centres for wellness in USA; The lack of a strong modern architecture tradition outside perhaps the Mexican Caribbean as opposed to India, Thailand and Sri Lanka which is a weakness that needs rectifying; The proposal for an architectural prize is one way of encouraging this. Attempts to find this image is taking place in Jakes in Jamaica, Jungle Bay in Dominica.

Interior Design

It is not just the exterior architecture and layout that defines a spa or wellness centre it is also the objects and the colours used to furnish it: This can be used to transform even mediocre exteriors; Most of the facilities I have visited have little or nothing to identify that one is in the Caribbean. Again, attempts to develop Caribbean design and craft exists in various countries; in some it is stronger than in others but it is clearly important to understand the links between the craft and design and the wellness sector. In Europe, Thailand and China some of the most famous architects and designers are used to design the spas and bring their name to the brand. Most of the treatment rooms are void of any pleasing objects, colours are uninspirational and even a few inspire a feeling of being in the Caribbean. Outdoor treatments are becoming increasingly popular and this is perhaps part of the true Caribbean spirit.

Treatment Systems

There is as yet no defined Caribbean treatment system or even partial treatment system, which can be promoted not just in the Caribbean but elsewhere. The Thai, Turkish, Indian and Chinese treatments have been adopted worldwide and form the core of most spa menus. The development of local spa menus is just beginning but needs more effort. Many of the treatments systems used in Thai or Chinese spas have been developed out of traditional medicine and the involvement of Caribbean traditional healers in the development of local treatments is something that needs to be much more developed.

Locally Trained Staff

Most internationally qualified therapists working in the Caribbean are not local. This is partly because of the lack of local training facilities but as important the lack of any local qualification schemes, which are internationally recognised. In the case of medical spa tourism then, the availability of trained nurses, para-medical staff and specialist surgeons is of critical importance. Quality control and quality assurance is critical to developed confidence in the system.

Products

The products used by the therapist and sold in both the spa shops and in the resort boutiques and drug stores can draw immediate attention to the image of the facility. Almost all the facilities use imported brands as the development of the local beauty care industry is at an early stage. Lack of formulation skills, lack of product testing, lack of raw materials, lack of packaging materials and lack of marketing and after sales service are just some of the constraints. Some work with CHBA and consortium and individuals is underway but progress has been slow to develop sufficient local or locally inspired product.

Red exudes warmth and passion, qualities that have motivated Spa Director Karen Sprung to redefine Sandals and Beaches spas throughout the Caribbean. You'll find more local products and island-inspired treatments. Here in the Turks, experience crushed conch shells acting as exfoliant, green coffee beans used in wraps and sea salt as body polish. The new West Indian Massage uses warm river stones, rain forest-scented mist and white sand for your tootsies. New signature treatments use the beach, the garden, and even a moonlit sea.

Marketing And Promotional Materials

The development of promotional materials both web based, print and TV and radio is of central importance to building the brand image. This is done through specialist trade association; ISPA; Spafinder; Hawaii spa tourism association; Thai spa association. At present CTO, CHA, CHBA or indeed none of the national promotional agencies have produced any specialist promotional materials for the wellness sector. This is a key demand of CSWA but even when funds are found it is important that the text and visuals are of the correct quality, image and philosophy. Promoting this image overseas will be the job of trade associations with government funding as for most owners the cost of taking stands is too high moreover it is essential to build a critical mass. A key question is can this be done regionally or only nationally.



What Are The Opportunities And Constraints On The Caribbean Health And Wellness Sector?

IN SUMMARY

- Varied rich physical environment
- Varied and rich botanical heritage
- Multiracial appreciation of beauty
- Excellent Climate
- Interesting culinary heritage
- Interesting traditional medicine system
- Rich and varied coast and marine coasts
- A large and growing tourist industry
- Large and vibrant resort hotel industry
- Global yacht and cruise destination
- Limited barriers to entry
- Returning emigrants

FINDING THE USP

It is important to try to find the USP (Unique Selling Point) for the Caribbean so when discussing its advantages it is

important to see these in relation to competitor destinations. One must always bare in mind whether what one finds in the Caribbean cannot equally well be found in Thailand or Hawaii.

Geographic position

Most of the Caribbean lies one or three hours flight from North America, the world's largest wellness market. Being on America's back door gives the region an advantage which none of its rival areas can compete against.

Rich and varied cultural heritage

The cross cultural nature of Caribbean society including cross cutting elements from Amerindian, African, Asian and European cultures, throws up much in the way of cultural traits which can be drawn upon. Of particular interest would

be Arawak and Carib wellness concepts although those of the mainland and indeed of West Africa, Asia and the different European colonial cultures can all be drawn upon to build up a rich and diversified picture.

A people of beauty

The multicultural society that has developed in the Caribbean has produced a strong, healthy, sportive society with a great sense of grace and beauty. Caribbean people are very interested in the way they look and hairstyles, clothing, jewellery and accessories are an important source of national identity. Caribbean sportsmen, women, fashion designers and models, as well as musicians, go a long way to promoting a youthful vibrant culture which supports the wellness ethic.

Rich and varied botanical resources

The geography of the Caribbean ensures it has a rich and varied number of medicinal and aromatic plants that have uses in wellness and beauty care as well a rich and varied flora and fauna as a background to the industry. Botanical gardens, parks and forest areas grow rapidly and abundantly making it very easy to create new landscaped areas as well as interior floral decorations, which are so important in Asian spa regimes.

A strong and vibrant tourist industry

There has been steady growth in the tourist industry right across the Caribbean. The major infrastructure in terms of ports, airports and telecommunication facilities are in place and a large resort hotel infrastructure has been built up. It is this infrastructure more than anything else which is driving the present wellness sector in the Caribbean.

A growing educated middle class and growing urbanisation

The Caribbean has a growing number of urban centres with a growing professional middle class, especially females who have the money and interest in beauty care, wellness and fitness. Port of Spain, Fort de France, Bridgetown and Kingston now all support such communities which in turn has created a great increase in the number of beauty salons and day spas which form an important local market for the wellness industry.

Relatively easy market access

Although with ancient roots, wellness tourism is a new

industry where new ideas and new initiatives are welcome and where small companies can still find a market niche. It was only in 1991 that the international spa association was formed. This means that there are not as yet many major barriers to entry and SME companies can get into the business easily.

The returning emigrants: retirees

The Caribbean diaspora now has a population in excess of those that remain. They reside in the big metropolis of London, New York, Miami, Atlanta, Paris and Amsterdam. Many of these people have invested in holiday and retirement homes in the Caribbean. They provide a growing market for beauty care products and services. This sub sector also is one which has attracted considerable interest amongst those promoting medical tourism and nursing homes.

CARIFORUM

The development of a single Caribbean market could also help to increase flows of funds to the region and within the member states. The free flow of product and skills could certainly help to alleviate some of the skill shortages that exist in the wellness sector and encourage regional regulations and standards. This single market will also make collaboration with non ACP Caribbean easier to administer.

New institutional structures

Apart from this grand strategy a number of important new organisations have been established within the last 2-3 years, which will help promote this industry internationally. This includes Caribbean Spa and Wellness Association (CSWA), International Day Spa Association Caribbean Chapter (ISPA), Caribbean Herbal Business Association (CHBA), Caribbean Association for Herbal Researchers and Practitioners (CARAPA). These will help promote the sector more rapidly.

A first attempt at defining the Caribbean USP

- Back door to the United States
- Cultural cross roads, Africa, Europe, South America
- World class hotel network
- Incredible geographic diversity
- Tropical island lifestyle
- Excellent winter climate
- Rich botanical diversity
- “Beautiful people”

Caribbean the number two destination for North American wellness travellers

A recent survey by ISPA listed the top Preferred Destinations for US wellness travellers:

- 68% USA
- 31% Mexico/Caribbean
- 25% Europe
- 15% Canada
- 10% Asia

The top Preferred Destinations for Canadian wellness travellers were:

- 45% Canada
- 39% Mexico/Caribbean
- 30% USA
- 24% Europe
- 12% Asia

WHAT ARE THE WEAKNESS AND CONSTRAINTS?

IN SUMMARY

- Lack of spa and wellness heritage
- Lack of thermal springs - sources
- Lack of trained therapists
- Small size of local market
- Lack of good health support systems
- Lack of well developed specialist associations
- Lack of brand identity
- Lack of product base
- Lack of focused promotion
- Lack of understanding of the sector
- Lack of market research
- Problems of inter island travel
- Over reliance on foreign technology
- Lack of specialised promotion
- Natural Disasters
- Violence

WEAKNESSES AND THREATS

As with strengths so with weaknesses. We need to try to distinguish between those problems which are common to many wellness destinations and those which are unique to the Caribbean. Moreover it is important to separate weaknesses and threats which apply to all aspects of the tourist industry and those which are specific problems of the wellness sector.

General problems

Small size of the local market

Small local market for wellness services. A city like Mexico City or Sao Paulo has perhaps as large an urban middle class market as the whole of the Caribbean combined. The small scattered local market and limited professional middle class clearly affects the day spa and fitness sectors.

Natural Disasters

The Caribbean and Gulf Coast has in the last two to three years received a lot of bad publicity due to Hurricanes and cyclonic storms. While the region has always suffered from this bad press perhaps not enough attention to safety standards can damage this as well as all tourism related products. This is obviously not something that affects the wellness sector especially. Indeed the destruction caused in Cancun and the Mexican Caribbean due to hurricane Ivan may have actually helped the ACP Caribbean spa operators.

Violence

Violence - This problem differs widely from island to island but places an important part in determining favourite locations. The boom in Barbados as opposed to Jamaica is clearly violence related while the flow of investment from oil rich Trinidad to Barbados is also linked to increasing violence on that island. Since the wellness industry lives on the idea of "peace and tranquillity" any feeling of violence or criminality will particularly affect this sector

Environmental Degradation

In many parts of the Caribbean irresponsible building regulations, overpopulation, poor water conservation and sewerage systems have caused serious degradation of the environment while road and boat congestion increases pollution on land and sea. The wellness industry almost by definition requires a clean, tidy and unpolluted environment to thrive. Degraded environments are not good for wellness investors.

Domination of sector by large international groups

Since much of the wellness development in the Caribbean has been resort based it has been largely the big hotel groups who have undertaken most of the investments there is a danger that they monopolise the benefits. Ensuring that SME operators are encouraged to enter this sector and

ensuring that the income generation and employment spin offs are well distributed will be difficult.

Lack of a well defined brand

As yet no distinctly Caribbean wellness brand has been identified or marketed by the operators in the region. Developing such a brand is critical to international promotion and the refining of the USP (Unique Selling Point). Discussion as to what goes to makes the brand is considered elsewhere in this report.

Lack of qualified staff

Although the hotel and catering sector as a whole has an ever expanding number of trained local staff this is not the case with wellness. There are very few local spa managers and very few trained technical staff. Traditional healers are not subject to any training or certification while skills in the area of formulation and development of treatment therapies, design of building and interiors is still very reliant on outside help.

Lack of local consultancy expertise

There are very few Caribbean consultants who specialise in providing business and technical services in this field. This lack of local technical expertise means that anyone wishing to enter this sector needs to recruit architects, interior designers, spa managers, equipment specialist and landscape planners from outside the region.

The high cost and limited availability of local beauty care products and treatments

While the Caribbean is rich in medicinal and aromatic plants the high cost of cultivation, the lack of management expertise and the very low levels of productivity mean that what limited materials that are available are expensive and of poor quality relative to the rest of the world. Lack of local quality extracts, oils and other beauty care inputs has hindered the development of local spa treatments.

Lack of information

There is a great lack of information about the local and regional wellness market. To date no proper market study has been undertaken to assess the size and structure of the Caribbean Wellness market and there are virtually monitoring facilities to track the growth of the industry in the region. Moreover the local tourist industry also lacks information about what is going on elsewhere in the world. Lack of

information about global trends in the wellness market about new products; treatments; competitors and possible partners inhibits growth.

Lack of awareness

Probably the biggest threat is a lack of awareness amongst Caribbean tourist planners and administrators of the growing importance of this component of the tourist industry. No major tourist destination will survive without a certain amount of spa wellness and fitness components being included whether within the all inclusive package or outside of such packages. There has perhaps been too much emphasis on growth in tourist numbers and hotel bed occupancy rates and not enough on the creation of new forms and brand of tourism.

Lack of unified standards and regulations

Unless strong regional organisations emerge to help develop and enforce regional standards there is a danger of huge variation in quality of services, training and facilities across the region. At present for instance each country has its own legislation covering what over the counter medicines and herbal supplements can be sold in drug stores and chemists. Similarly, legislation on skin care products is either non-existent or of varying standards across the region. A key role for regional associations is to try to unify such standards where they exist.

Cultural Attitudes to pampering, massage and nudity

While the Caribbean may at first sight appear a free and liberated environment, religion and strong family tradition is still very important. By and large there is a pretty conservative attitude to body care, beauty care and body treatment. Very few Caribbean men for instance go to day spas, massage is treated as something that only happens in red light districts and nudity is generally frowned upon either on beaches or in spa facilities. These attitudes put a slight break on the growth of the local market for wellness products and services.

Lack of good health support systems

The largest deterrent for development of retirement communities in the Caribbean is the state of the existing health systems according to the World Bank. Lack of good general health care means that visitors need to take out expensive overseas health insurance if they retire in most Caribbean islands. Only Martinique and Guadeloupe offer the sort of services expected by EU citizens.



The Role Of Different Support Organisations

Caribbean Export

The Caribbean Export Development Agency (Caribbean Export) is a regional agency set up to promote the export of Caribbean goods and services both regionally and extra-regionally. Caribbean Export has identified some new sectors for promotion which includes creative industries, agroprocessing and the health and wellness sector. The Agency has a significant role to play in the provision of linkages created with the wellness product suppliers and developers and wellness service suppliers and raising awareness of the potential of this sector.

Caribbean Export works in partnership with other institutions, national, regional and international and will actively promote this sector in the years to come. Several facilities are being put in place to facilitate this work. For more information contact: services@carib-export.com.

Caribbean Development Bank

As the lead development bank in the region, CDB is a major investor in all aspects of the Caribbean tourist industry. As far as we are aware CDB has no specialist staff nor any specific portfolio or programme which targets the health and wellness sector. It would appear CDB needs to take a more active role in the planning and investment in the sector.

CTO - Caribbean Tourist Organisation

The CTO is the key strategic and planning agency for the regional tourist industry. To date there is no coherent CTO strategy or programme for the health and wellness sector nor any specialist staff or expertise in this field. Their sustainable tourism development programme has many inputs and features which could directly dovetail with the wellness

industry. The STDP training programme for instance could begin to help outline comprehensive wellness training and a certification programme. There is clearly a keen interest by CTO to get involved in this sector but lack of a road map we believe hinders active participation

Caribbean Hotel Association

The CHA is the key trade association operating in the field of Caribbean tourism. With a strong membership base right across the region this organisation has a key role to play in promoting health and wellness tourism. So far little efforts have been made in this direction. The development of the new web based portal for the association opens up opportunities for cooperation in market promotion with other more directly wellness orientated organisations. CHA has no special committees on wellness or agro tourism as yet.

Caribbean Alliance for Sustainable Tourism (CAST)

CAST's mission is to enhance the practices of the region's hotel and tourism operators by providing high-quality education and training related to sustainable tourism. CAST serves, through its direct connection with 1,100 Caribbean Hotel Association members and 750 allied members, CAST provides an excellent possible vehicle to deliver some health and wellness services.

CHBA - Caribbean Herb Business Association

A new trade association designed to promote the growth of the herbal and nutraceutical industry. CHBA has taken some time to "find its feet" and its membership base and internal finances are still weak. CHBA is still very reliant on donor finance and has as yet no clear manifesto or management team to drive it. Links with the wellness sector exist in principle but no coherent action plan or technical support work has been undertaken to date.

CARAPA - Caribbean Association for Research and Practitioners

This organisation is a network organisation for scientists and healers working with medicinal plants and provides the technical counterpart to the CHBA. . The differing roles of CARAPA and CHBA are still unclear but to date informal collaboration has been strong.

CSWA - Caribbean Spa and Wellness Association

An even newer organisation which has brought together many of the key spa owners, promoted originally by CDE at the first Caribbean wellness conference in St Lucia the organisation has begun to develop a programme of work and a management team drawing upon Hilton and Le Sport as the key pillars of the sector. The marketing and training sub committees will play a key role in defining the road map for the resort spas of the region.

ISPA Caribbean Chapter

The ISPA Caribbean Chapter has been promoted by Positive Tourism in Jamaica to bring together medical and day spas in the region. This is a slightly different client group as that served by CSWA but there is much to be done to build bridges between these two organisations to avoid wasteful duplication.

CFNI: Caribbean Food and Nutrition Institute (CFNI)

40 years old, the goal of CFNI is to attain household food security and achieve optimal nutritional status for all the people of the Caribbean. The Mission of CFNI is to cooperate technically with member countries to strengthen their ability to analyse, manage and prevent the key nutritional problems and to enhance the quality of life of the people through the promotion of good nutrition and healthy lifestyle behaviours. So far they have not been involved in health and wellness tourism at all.

IICA

IICA is the main agricultural and rural development training and technology transfer organisation in the region with offices in most CARICOM countries and interesting links with Central America. IICA is the management organisation for the OAS agro tourism project and through this initiative has much to offer in terms of developing linkages between the wellness sector and the agricultural sector

CROAM - Caribbean Organic Agricultural Movement

Another recently created regional organisation this trade association has struggled to find a raison d'être and a membership base. Presently headquartered at the University of Guyana CROAM has so far failed to bring in the private sector into its fold. Other national organisations like JOAM in Jamaica and BOAC in Barbados have developed as important national pressure groups for organic and natural products. They have not solved the problem of the chronic lack of

product supply of any form of Caribbean organic materials

sector partnership.

The Caribbean Epidemiology Centre (CAREC)

CAREC's mission is to improve the health status of Caribbean people by advancing the capability of its 21 member countries in Epidemiology, laboratory technology and related public health disciplines through Technical cooperation, Service, Training and Research.

Caribbean Media Exchange

The Caribbean Media Exchange (CMEx) is a regular gathering of tourism industry representatives, government officials, media, youth delegates and development specialists in a bid "to improve the health, wealth, environment and culture of destinations".

CMEx is linked to Counterpart, a US based charity set up to promote sustainable tourism and promote fair trade in the industry.

SOME RECOMMENDATION POSSIBLE INTERVENTIONS

Health and wellness information centre

The most immediate task that needs to be undertaken is to develop a centre for the survey, collection and evaluation of data on both the regional and the international health and wellness industry. Such a centre, which could possibly be a virtual facility, needs to:

- Undertake consumer surveys within the Caribbean
- Monitor developments in competitive markets
- Develop a data base of regional wellness facilities
- Develop a data base of regional service providers
- Develop a data base or regional and international input suppliers
- Technical survey geo-thermal sites and mineral springs

Development of Quality Assurance and Certification Programmes

Certification of both spa facilities and the staff who work in them is an important aspect of improving client security and satisfaction. At present there are no recognised standards for either the facilities or management or the technicians working in wellness facilities. This applies equally for resort spas as to day spas, beauty salons and wellness and healing centres.

The development of such standards requires a public-private

The key issues are to prepare:

- Guidelines for the assessment of quality standards (whose rules EU, US, Thai?)
- Evaluation of present facilities and grading of such facilities
- Development of fixed and mobile training centres for both practitioners and managers
- Development of a regional certification and inspection body

The CSWA training sub committee has already drawn up a work programme which is of direct application. Its general aim is to improve the quality of our spa related services through technical competence and human resource enrichment, by means of ongoing assessments and educational programmes. The long term aim is to establish a benchmark standard of Spa training throughout the Caribbean by means of a syllabus, tailored to our specific regional needs.

- Plan of action: To consult with persons currently involved in the training of spa personnel throughout the Caribbean in order to sufficiently establish their needs and concerns as well as the challenges the face.
- To arrange Training programmes for trainers which target the improvement of their ability to administer training.
- To arrange training for spa personnel using regional trainers as well as international independent spa trainers as may be necessary.
- To prepare news letters approx. twice yearly in order to keep spa personnel up-to-date * with new treatments and techniques.

Suggested training seminar topics

Anatomy & Physiology
 Massage Techniques
 Aromatherapy
 Skin Care
 Electrotherapy
 Nailcare
 Makeup Artistry
 Thallasotherapy
 Hair Removal Techniques
 Ear Piercing

Other topics

Health & Safety
 Professional Image
 Professional Ethics
 Spa management/marketing/operations

Product Knowledge (General)

Development and Promotion of the Caribbean wellness brand

To make any impact on the international market the Caribbean wellness industry must come up with an identifiable brand, which it will use to promote the industry worldwide. In a previous section of this report we have tried to outline the key elements that go into create a unique brand. Expertise is needed to gather information, images, sounds and other images and coming up with an agreed brand product. A brand consultant working closely with regional trade organisations would be needed to develop:

- Special logos, slogans, special activities need to be developed and designed
- A web site
- A regional wellness magazine
- A regional PR campaign
- Specialist merchandise
- Caribbean stands at major international trade events manned

A Private - Public sector partnership commission on wellness development.

One of the problems with developing this sector is that it is multidisciplinary with no clear boundaries between different sectors of the economy. As a result no Ministry or Government department and few private sector trade bodies have adopted the health and wellness sector as their own. Every organisation is waiting for its neighbour to take the lead. In consequence nobody moves!

It is essential that regular consultations between representatives of the following sectors need to be organised to help plan interdisciplinary and inter-ministerial collaboration:

- Tourist Promotion - National and international
- Architecture and Town Planning - Building Conservation, parks, roads, street architecture
- Agriculture and Rural Development - MAP production; organic foods; Agro-tourism etc; botanical gardens
- Environmental Management - water, forest, air quality
- Small Industry Development - cosmetics; interior accessories; gifts
- Health and Family Welfare - Support for traditional healers, regulations, private health care, nursing services

In Europe and the Far East the success of the industry is usually due to a successful public-private sector partnership;

In the Caribbean to date it has been the big resort chains or international spa groups that have taken most of the lead in promotion. It is our view that if even half of the organisations listed in the previous section regularly met to develop supporting programmes for the development of the health and wellness sector, rapid progress would soon be achieved at relatively minimal cost.

Wellness Conservation and Environmental Protection Programme

To develop a wellness sector without a comprehensive national or regional programme to foster and protect both the buildings and the natural environment within which health and wellness tourism is practised is well neigh impossible. It is not surprising that this industry develops in areas with excellent forest and woodland management, flourishing botanic gardens, parks and coastlands and interesting historic architectural buildings and facilities. Industrial pollution, run down urban landscapes and degraded forests and coastline actually discourage investment in the health and wellness sector.

A survey is required of the location of existing infrastructure and planned investments

To see to what extent the environment around these facilities is threatened or could be improved by conservation laws, planning legislation and proper zoning.

Spa and Wellness Architecture and Design Course

The Caribbean has few graduate level facilities where art, architecture and design are studied. The most advanced ones appear to be in Jamaica, Dominican Republic, Trinidad and Cuba.

These centres should be encouraged to start special courses in wellness architecture and design to encourage the creation of more local products. An international wellness architecture and design prize was one of the recommendations of the first Caribbean Wellness conference in St Lucia.

Design and manufacture of Caribbean Spa and Wellness Furniture and Accessories

Spa, beauty salons, wellness treatment centres and even fitness centres require a wide range of fixtures and fittings many of which can be made using local design and materials. In Thailand and Malaysia bamboo and local woods are used for most of the treatment centres, while batik textiles, cotton towelling robes, slippers, bed covers are all made locally using

traditional textile designs. Wellness shops require also good local accessories. Efforts should be made to set up small workshops or bring together groups of young designers and designer manufacturers to produce a range of wellness fittings and accessories. One attempt of this nature is taking place in Martinique. USAID is promoting the design of contemporary outdoor furniture in Guyana and similar work is taking place in Surinam. These efforts are not specifically focused on the wellness sector.

Beauty Care product development in the Caribbean

A review of Caribbean companies in the body care/beauty care sector suggests that only one or two products from each company are presently suitable to sell in overseas markets. Major investment in time and money would be required to launch their full product range individually. Even where the formulation is sound, company branding and packaging is seldom up to standard. None of the companies, moreover, have the strength and know how to formulate, market test and promote a sufficiently large range on their own to make an impact on export markets. From this stems the idea of a developing consortium group to develop Caribbean body care range made up of a selection of the very best products available in the region. The key components features of such consortium are:

- Formation of jointly owned marketing company
- Five to six companies involved
- A specially selected product range drawn from right across the Caribbean
- Uniform branding, packaging and labelling
- Each partner works as a contract manufacturer for the group
- Centrally distributed from probably Miami
- Joint promotion through trade fairs and stands

To date one attempt at such a regional consortium is underway and despite many technical and administrative problems they hope to launch a limited range of truly Caribbean products geared to the wellness market and regional high end stores.

Development of Caribbean Organic and Natural Food products

In 2004 Denzil Phillips International prepared a business plan strategy for the Caribbean organics sector. The project was sponsored by ASTT and Proinvest. The main recommendations of this project are summarised below as they apply equally to this exercise.

Regional and international surveys of the organic industry

confirm that with the notable exception of the Dominican Republic, the Caribbean is only a very minor producer and even smaller exporter of health foods and organic products. Moreover surveys showed:

Europe is rapidly becoming self sufficient in basic organic fresh produce hence export opportunities are far less attractive than the regional market.

- a) Europe is rapidly becoming self sufficient in basic organic fresh produce hence export opportunities are far less attractive than the regional market.
- b) There is a chronic lack of supply of certified and non-certified organic product throughout the Caribbean region.
- c) Caribbean transport and logistical costs make it very costly to export perishable produce either regionally or internationally.
- d) Present Caribbean food exporters are by and large too small to individually satisfy the year round requirements of even small EU or US importers.
- e) Central and South American farmers can produce organic raw materials similar to that grown in the Caribbean for 75% or 50% of the cost. Against this background, DPIL proposed the following strategy:

1) Promote health foods not just organics

To promote both health foods and organic products with the former being a stepping stone to reach the latter. By limiting efforts to simply certify organic products, the production and local marketing base will simply be too small to have any impact on the agriculture of the region.

2) For fresh product focus on your local market and cut transport costs

Focus must be placed on the supply and distribution of a small selection of value added products, to local supermarkets and high-end hotel outlets in the local markets not on exports. The wellness industry offers a growing customer base for all kinds of healthy vegetables and fruits.

3) Develop pre packing facilities to collect, grade, package and pack healthy foods

To promote expanded local demand for healthy and organic vegetables we recommend the establishment of a **model specialist pack house in selected major urban catchment areas**. The pack house would work closely with a series of **"approved growers"** who would either be members of local organic associations or farmers prepared to operate under EU approved **Good Agricultural Practices (GAP) for**

natural products.

4) Develop a specialist input supply companies for the health food and organic sector

As a vital complementary service to farmers supplying such pack houses **an input supply company/agency** would be set up which would provide both specialised organic farm inputs as well as training in organic and non organic GAP. The input supply company/organisation could be a private company or growers co-operative. They could produce **organic compost, bio-pesticide** and possibly **vermiculture**.

5) Launch a Caribbean Natural Health Show

In almost every region of the world there is a professional trade fair event specialising in natural products and organic foods. We recommend that local organic and agribusiness organisations in the region should help develop a Caribbean Natural Product Fair. This event along with an associated trade magazine and web site should become the main "shop window" for both producers and consumers of organic and healthy food. This could be a specialist section of the Caribbean Craft and Gift Fair but the preferred option would be for it to link with a major or culinary food or wellness event.

6) Naturally Caribbean Marketing Consortium

The cost and skills require to promote a product range in major overseas markets grow all the time. Very few Caribbean food companies have the financial muscle to develop new markets on their own. We therefore, recommend the setting up of a market umbrella including a Caribbean companies ready and able to export organic and speciality natural foods on the international market. This "association" which we have called "Naturally Caribbean" would have its own web site, sales catalogue and a common ordering point. A membership fee will be charged and operating costs will be a shared arrangement for trade fairs, trade missions and other trade promotion activities.

Caribbean Wellness Cooking and Catering Facilities

Closely linked to the above projects to expand the range and quantity of health foods and organic products is the development and promotion of Caribbean catering facilities, which cater specifically for the health and wellness market. This will include:

- Identification of local fruits and vegetables which have functional health properties
- Development of such raw materials into special menus
- Inclusion of such ingredients into processed foods
- Promotion of Salad Bars
- Promotion of Juice Bars
- Health food corners in Supermarkets
- Health food restaurants
- Vegetarian restaurants
- Special cook books
- Special slimming programmes on TV and radio
- Development of special skills at regional catering schools
- Mobilisation of local food technology centres to focus on health foods and nutraceuticals
- Culinary and wellness festivals

APPENDIX: MAJOR SPA AND WELLNESS INFORMATION SOURCES

www.spafinders.com

A leading US based spa promotion organisation

www.monacospaevent.com

A major spa and wellness exhibition and conference event

www.thermalies.com

The largest public show concerning thermal spas in Europe

www.professionalspa.co.uk

A professional conference in UK

www.spaandresortexpo.com

One of the major shows in the US concerning spas

www.spavox.com

Spa marketing company specialising in the Caribbean

www.chainethermale.fr

A French association marketing French thermal spas

www.hwta.net

Hawaii wellness tourism association, first national WELLNESS

www.spagoer.com

Promotion site prepared by author of 100 best spas in the world

www.spaasia.com

Major spa and wellness conference in Asia

www.experienceispa.com.

ISPA is recognized worldwide as the leading professional organization and voice of the spa industry. Founded in 1991, ISPA's membership is comprised of more than 2,700 health and wellness facilities and providers from 75 countries

www.mspa-international.com

MSpa International Ltd., the operators of the prestigious Mandara and Anantara spa brands in Thailand, China, the Middle East & Africa with 28 spas and plans for 80 spas by end of 2008.

www.destinationspas.com

The Destination Spa Group directory which focuses on health and wellness programmes. Links to 26 resorts across the US, Canada and Mexico can be accessed.

www.experienceispa.com

The International Spa Association - Members of this professional association include resorts, day spas, and destination spas worldwide.

www.thespadirectory.com

Spas Directory - based in England, lists destinations worldwide. Not comprehensive, but helpful links. Also offers news and views.

www.virtualspa.com

Virtual Spa - Professional resources for enhancing your business and career in the spa industry.

www.discoverspa.com

A large free spa directory

www.healinglifestyles.com

A US health and wellness site

50 TOP SPAS

The Independent newspaper recently listed 50 of the world's top spas. It is interesting to note that so far only Four Seasons in Nevis and Cotton House in Mustique are Cariforum based spas, Parrot Cay in Turks and Caicos and Little Dix Bay in the Virgin Islands are the only other Caribbean award winners. France and Thailand have the most awards.

Ananda - India

Banyan tre Thailand

Begawan Giri Indonesia

Blue Lagoon Iceland

Canyon Ranch US

Chiava Som Thai

Cocoa isand Maldives

Cotton House Mustique

Daintree Australia

Datai - Malaysia

Dogo onsen Japan

Fairmont Scottsdale USA

Four Seasons - Maldives

Four seasons Nevis

Gellert- Hungary

Grayshott Hall UK

grotta giusti Italy

Hasseludden Sweden

Hilton Maldives

Le 32 Montorgueil, France

Le source de caudalie France

Le Touessrok Mauritius

Les Fermes de Marie France

Les Thermes Marins - st Malo France

Little Dix Bay Virgin Island

Mardavall Mallorca

Marienbad -Czech

Mayr Spa Austria
 Mountain Resort Delphi Ireland
 Observatory - Australia
 One spa UK
 Opium spa Cyprus
 Pangkor Laut - Malaysia
 Parrot Cay - Turks & Caicos
 Royal Park Evian france
 Sanctuary Zara Jordan
 Serinity Spa UK
 Sofitel Thalassa Portugal
 Soneva Gili - Maldives
 Spa at Las Ventanas USA
 Spa at Mandarin Singapore
 Stoke Park UK
 Taj by Mandara Maldives
 Tamara India
 Terme di Saturnia Italy
 Thakassa Cyprus
 Thermae Bath Spa UK
 Therme Vals Switzerland
 Thermes de Marins - Switzerland

LIST OF GERMAN SPA TOWNS

- Aachen (Aix-la-Chapelle, Aken)
- Alexisbad
- Bad Abbach
- Bad Aibling
- Bad Arolsen
- Bad Bentheim
- Bad Berka
- Bad Berleburg
- Bad Bevensen
- Bad Bramstedt
- Bad Breisig
- Bad Brückenau
- Bad Buchau
- Bad Cannstatt (Stuttgart)
- Bad Doberan
- Bad Dürkheim
- Bad Elster
- Bad Ems
- Bad Endorf
- Bad Fallingbommel
- Bad Frankenhausen
- Bad Gandersheim
- Bad Godesberg
- Bad Gottleuba-Berggießhübel
- Bad Grönenbach
- Bad Harzburg
- Bad Hersfeld
- Bad Homburg
- Bad Honnef

- Bad Kissingen
- Bad Klosterlausnitz
- Bad König
- Bad Königshofen
- Bad Kösen
- Bad Köstritz
- Bad Kreuznach
- Bad Krozingen
- Bad Lausick
- Bad Marienberg
- Bad Mergentheim
- Bad Münster am Stein-Eberburg
- Bad Nauheim
- Bad Neuenahr-Ahrweiler
- Bad Neustadt
- Bad Oeynhausen
- Bad Orb
- Bad Pyrmont
- Bad Reichenhall
- Bad Säckingen
- Bad Salzuflen
- Bad Salzungen
- Bad Schwartau
- Bad Segeberg
- Bad Sulza
- Bad Sülze, Nordvorpommern
- Bad Tölz
- Bad Vilbel
- Badenweiler
- Bad Wiessee
- Bad Wildbad
- Bad Wildungen
- Bad Wörishofen
- Baden-Baden
- Belzig
- Heilbad Heiligenstadt
- Tegernsee
- Titisee-Neustadt
- Wiesbaden
- Wildbad Kreuth

LIST OF THERMAL SPAS IN UK

- Askern
- Bath
- Boston Spa (West Yorkshire)
- Builth Wells
- Buxton
- Cheltenham Spa
- Dorton Spa
- Droitwich Spa
- Epsom
- Harrogate
- Ilkley
- Knaresborough

- Llandrindod Wells
- Llangammarch Wells
- Llanwrtyd Wells
- Malvern
- Matlock
- Matlock Bath
- Royal Leamington Spa
- Royal Tunbridge Wells
- Shearsby
- Strathpeffer
- Tenbury Wells
- Woodhall Spa

LIST OF WELLNESS TRADE FAIRS

- **FERIEN** - Bern (Switzerland)
New Holiday, Leisure Time and Wellness Concepts Fair
- **LEBENSART** - Hannover (Germany)
Wellness & Leisure Exhibition
- **ITBA** - Kiev (Ukraine)
International Exhibition of Hotels, Health Centers, Holiday Resorts, Clubs and SPA
- **VACANCES, SPORTS & LOISIRS** - Geneve (Switzerland)
Tourism, Sports, Wellness, Diving and Leisure Time Fair
- **NATURE** - Venice (Italy)
Nature & Wellness Fair
- **GOLF UND WELLNESSREISEN** - Stuttgart (Germany)
Golf and Wellness Holidays
- **INTERNATIONAL TRADE FAIR** - Trieste (Italy)
Handicrafts, Tourism & Wellness, Regional Food Specialties
- **FERIEN-MESSE** - Vienna (Austria)
Plenty of New Ideas on how to Lead a Healthy Life, on Spa Hotels and Saunas, and on how to organize your Leisure Time
- **SALON DES SENIORS** - Paris (France)
The biggest Senior & Retirement Expo in France. Tourism, Lifestyle, Health, Wellness, Financial & Juridical Services, IT Technologies
- **ALTRAVITA - EKOVIDA** - Skopje (Macedonia)
International Fair of Popular and Traditional Medicine, Medical Tourism, Protection and Improvement of Environment and Technical and Technological Achievements, Organic Food, Paranormal Power and Leisure Physical and Spiritual Sports and Activities

LIST OF SPA FAIRS

- **WELLNESS** - Banská Bystrica (Slovakia)
Annual Exhibition of Healthy Life Style and Spa Industry
- **SPA, HEALTH AND FITNESS** - Kiev (Ukraine)
International specialized Exhibition of Health and Beauty Technologies
- **SPAS** - St. Petersburg (Russia)

Specialized Exhibition in Complex of Sanatoriums and Resorts, Recreational, Health and Fitness Centers, New Technologies

- **SALON DES THERMALIES** - Paris (France)
Water, Wellness, Thermalism & Thalassotherapy Exhibition
- **WELLNESS WORLD EXHIBITION** - Milan (Italy)
Exhibition devoted to Fitness, Diet, Spas and Beauty Treatments
- **WELLNESS & SPAS MIDDLE EAST** - Dubai (United Arab Emirates - UAE)
International Trade Fair for the Professional Spa and Wellness Industry
- **WELLNES - BALNEA** - Prague (Czech Republic)
International Trade Fair of Balneology and Regeneration
- **WELLBEING SHOW DUBAI** - Dubai (United Arab Emirates - UAE)
Comprehensive Event presenting all aspects of the Wellbeing Concept
- **LIFETIME KONGRESS** - Francfort (Germany)
International Congress for the Professional Spa and Wellness Industry & accompanying Expo
- **BEAUTY SALON DIMENSIONS** - Utrecht (Netherlands)
Trade Fair for Beauty Specialists, Manicurists, Pedicurists, Owners of Hairdressing Salons, Cosmeticians, Trainee Beauticians, Skin Therapists, Managers/Employees of Solariums, Saunas, Beauty Centres, Fitness Centres and Slimming Establishments
- **BEAUTY & TRENDZ AHEAD** - New Delhi (India)
International Exhibition on Hair, Skin, Cosmetics, Nails, Spa, Aesthetic, Packaging, Contract Manufacturing, Health, Slimming, Wellness
- **ITBA** - Kiev (Ukraine)
International Exhibition of Hotels, Health Centers, Holiday Resorts, Clubs and SPA
- **BEAUTY EURASIA** - Istanbul (Turkey)
International Exhibition for Beauty Products, Cosmetics, Perfumery, Beauty/Hair Salons, Packaging, Private Label, Wellness and Spa
- **LIFETIME** - Francfort (Germany)
International Trade Fair for the Professional SPA and Wellness Industry
- **MONDIAL SPA & BEAUTÉ** - Paris (France)
International Spa & Beauty Exhibition
- **COSMOFARMA EXHIBITION** - Bologna (Italy)
Health, Wellness, Beauty Products and Services sold in Pharmacies
- **FERIEN-MESSE** - Vienna (Austria)
Plenty of New Ideas on how to Lead a Healthy Life, on Spa Hotels and Saunas, and on how to organize your Leisure Time

WELLNESS AND BEAUTY EVENTS

- **SPATEX** - Brighton (United Kingdom - UK)
Exhibition for Professionals in the Design, Installation, Retailing, Maintenance, Operation and Management of Pools, Spas, Saunas and Ancillary Equipment
- **COSMOPROF ASIA** - Hong Kong (Hong Kong)
International Perfumery and Cosmetics Exhibition
- **AQUA-THERM NITRA** - Nitra (Slovakia)
International Trade Fair for Heating Technology, Air Conditioning, Sanitary, Environmental Protection Technology, Measurement and Regulation
- **COSMOPROF** - Bologna (Italy)
International Perfumery and Cosmetics Exhibition
- **WELLBEING SHOW DUBAI** - Dubai (United Arab Emirates - UAE)
Comprehensive Event presenting all aspects of the Wellbeing Concept
- **BEAUTY & TRENDZ AHEAD** - New Delhi (India)
International Exhibition on Hair, Skin, Cosmetics, Nails, Spa, Aesthetic, Packaging, Contract Manufacturing, Health, Slimming, Wellness
- **INTERBAD** - Dusseldorf (Germany)
International Trade Fair for Swimming Pools, Pool and Baths Technology, Saunas, Physiotherapy
- **THE MONACO SPA EVENT** - Monaco (Monaco)
European Spa Exhibition for Luxury Hotels, Spa Resorts, Thalassotherapy Institutes, Thermal Institutes, Beauty & Cosmetic Institutes...
- **SPAS** - St. Petersburg (Russia)
Specialized Exhibition in Complex of Sanatoriums and Resorts, Recreational, Health and Fitness Centers, New Technologies
- **SPA, HEALTH AND FITNESS** - Kiev (Ukraine)
International specialized Exhibition of Health and Beauty Technologies
- **WELLNESS & SPAS MIDDLE EAST** - Dubai (United Arab Emirates - UAE)
International Trade Fair for the Professional Spa and Wellness Industry
- **SHK MOSCOW** - Moscow (Russia)
International Trade Fair for Sanitation, Heating, Air-conditioning, Swimming-Pools, Pools & Bath Technology, Sauna
- **LIFETIME KONGRESS** - Francfort (Germany)
International Congress for the Professional Spa and Wellness Industry & accompanying Expo
- **BEAUTY SALON DIMENSIONS** - Utrecht (Netherlands)
Trade Fair for Beauty Specialists, Manicurists, Pedicurists, Owners of Hairdressing Salons, Cosmeticians, Trainee Beauticians, Skin Therapists, Managers/Employees of Solariums, Saunas, Beauty Centres, Fitness Centres and Slimming Establishments
- **LIFETIME** - Francfort (Germany)
International Trade Fair for the Professional SPA and Wellness Industry
- **COSMOPROF COSMETICA** - Sao Paulo (Brazil)
International Perfumery and Cosmetics Exhibition
- **SPA & INSTITUT BY COSMEETING** - Paris (France)
Exhibition dedicated to Beauty Care Products and Equipments for Beauty Salons and Spas
- **ISPA** - Shanghai (China)
International Spa Resorts, health Care Products, Equipment, Accessories & Essential Exhibition
- **JARDIN ET PISCINE** - Paris (France)
Gardens and Swimming Pools Exhibition
- **AQUA-THERM MOSCOW** - Moscow (Russia)
International Trade Fair for Heating, Ventilation, Air Conditioning Technology, Sanitary Equipment & Environmental Protection - Including Moscow Pool
- **THE GOOD HEALTH & BEAUTY SHOW** - Sydney (Australia)
One of the Leading Healthcare Events in Australia.
- **WELLNES - BALNEA** - Prague (Czech Republic)
International Trade Fair of Balneology and Regeneration
- **FERIEN-MESSE** - Vienna (Austria)
Plenty of New Ideas on how to Lead a Healthy Life, on Spa Hotels and Saunas, and on how to organize your Leisure Time
- **WELLNESS** - Banská Bystrica (Slovakia)
Annual Exhibition of Healthy Life Style and Spa Industry
- **WELLNESS WORLD EXHIBITION** - Milan (Italy)
Exhibition devoted to Fitness, Diet, Spas and Beauty Treatments
- **SALON DES THERMALIES** - Paris (France)
Water, Wellness, Thermalism & Thalassotherapy Exhibition
- **POOL SALON MOSCOW** - Moscow (Russia)
International Trade Fair for Swimming Pools, Whirl Pools, Aqua-parks and Saunas
- **ITBA** - Kiev (Ukraine)
International Exhibition of Hotels, Health Centers, Holiday Resorts, Clubs and SPA
- **BEAUTY EURASIA** - Istanbul (Turkey)
International Exhibition for Beauty Products, Cosmetics, Perfumery, Beauty/Hair Salons, Packaging, Private Label, Wellness and Spa
- **SALON DE LA PISCINE, SPA ET SAUNA** - Paris (France)
Swimming Pool, Spa, and Sauna Show
- **MONDIAL SPA & BEAUTÉ** - Paris (France)
International Spa & Beauty Exhibition
- **COSMOFARMA EXHIBITION** - Bologna (Italy)
Health, Wellness, Beauty Products and Services sold in Pharmacies



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