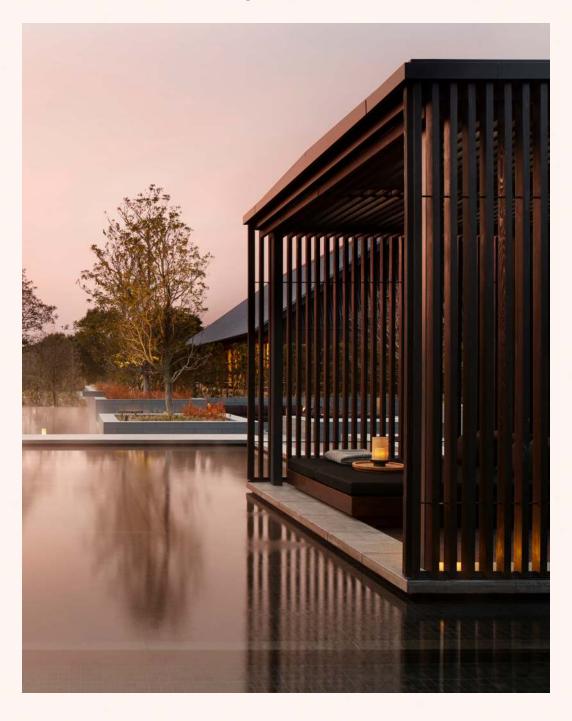


WHAT WELLNESS TRAVELLERS WANT

September 2018



Mental Health Retreats, Plastic-Free Policies & The Maldives

INDEX

About Compare Retreats	03
Research Method	04
Executive Summary	05
Survey Demographics	09
Part One: Wellness Traveller Habits	10
Part Two: Retreat Trends	15
In Brief: Top Take Aways	23

COMPARE RETREATS

AT A GLANCE



Compare Retreats is the world's first booking portal and online publication for luxury wellness retreats that have been vetted by certified health and fitness professionals.

From Aman Resorts and Mandarin Oriental Hotels to The Farm at San Benito and Nihi Sumba, our partners range from the biggest brands to the most renowned boutique resorts in luxury wellness.

As the wellness travel industry continues to evolve rapidly, we turned to our community to find out what wellness travellers actually want — and how their preferences and habits will shape the trends of the future.

RESEARCH METHOD



This research study presents findings from a self-administered online survey conducted between August and September 2018.

504 fully completed questionnaires were submitted. Participants were wellness travellers who are interested in luxury wellness retreats, aged between 18 and 76, who predominantly live in Hong Kong, Singapore, UK, Ireland, USA and Australia. Participants were recruited through Compare Retreats' online channels including their digital magazine, newsletter, Instagram, Facebook, Twitter, LinkedIn and Pinterest.

EXECUTIVE SUMMARY

WHAT WELLNESS TRAVELLERS WANT: MENTAL HEALTH RETREATS, PLASTIC-FREE POLICIES AND THE MALDIVES

Wellness has become more than a trend. As a multi-trillion dollar industry, wellness has become a point of global concern, and the wellness travel industry continues to be the fastest-growing tourism market. The sector is far from reaching saturation-point. With more wellness retreats on offer than ever before, what is it that wellness travellers really want?

To find out the answer to that question, Compare Retreats, the online booking portal and publication for the world's leading luxury wellness retreats, conducted an online survey to investigate the desires of wellness travellers globally. Compare Retreats surveyed 504 wellness travellers between the ages of 18-76 from locations around the globe including Hong Kong, Singapore, the USA, the UK and Australia, to explore consumers' behaviour, preferences and desires.

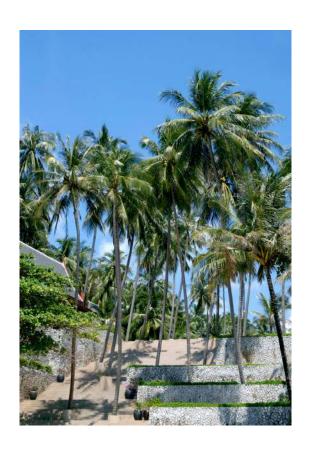
From most-desired destinations to how wellness travellers research retreats, the survey results have uncovered what makes wellness travellers in 2018 tick.

Google search, Instagram, and friend referrals are key channels

The top three ways that the wellness travellers surveyed research and found retreats were via Google search (80.5%), friend referrals (65.6%), and Instagram (45.7%). Online publications are important among the 50+ demographic where they ranked third in place of Instagram. With good SEO practices, online publications can see themselves having extra influence if they fall into the top pages of a google search. Print publications are important for third-party validation of wellness retreat businesses but only 10.7% of users said they refer to print when searching for a retreat. This indicates that advertisers and retreats would be wiser investing money in online publications and well-crafted Instagram marketing plans as well as referral programmes to reach across audiences of all ages and genders.

Mental health is the new wellness priority

Physical fitness has long dominated the wellness industry, but wellness travellers are showing a significant shift towards mental health as their main focus on retreats. Survey respondents were asked to rank mental, physical and spiritual health in order of importance: 62.9% selected mental health as number one. Millennials ranked mental health far higher than other demographics, with 67.2% ranking it as first compared to 57.7% of Gen X and only 52.5% of the 50+ group. Overall, physical health was ranked first by 24.4% of respondents, and second by 57.9%, showing it continues to be important to many wellness travellers. Spiritual health ranked last, with 75.8% respondents selecting it as their lowest priority.



Plastic-free policies influence wellness travellers' decisions

The anti-plastic movement is growing momentum fast, and 89.5% of wellness travellers surveyed want wellness retreats to have a plastic-free policy. Women were more concerned with environmental issues: with 90.7% of female respondents favouring plastic-free policies to 82.3% of men. The huge push towards plastic-free demonstrates the need for wellness retreats to update their sustainability policies to remain competitive.

The Maldives, Bali and Thailand come out on top

Tropical destinations continue to dominate the wellness travel destination bucket list, although surprisingly, Bali is no longer the number one choice for wellness travellers. The three most desired wellness travel destination was The Maldives (45.4%), followed by Bali (42.9%) and Thailand (34.5%).

Retreats are for prevention instead of a cure

Wellness retreats are commonly viewed as an annual investment in your body and mind. The majority of retreat-going wellness travellers surveyed (45%) attend a retreat once a year, while 36.6% save wellness retreats for special occasions, and 18.4% go two or more times per year. Furthermore, only 0.2% of wellness travellers showed interest in medical health retreats and having doctors onsite ranked the lowest of the desired features (2.8%).

All-inclusive packages are preferential

78% of wellness travellers want all-inclusive packages and set programmes that include accommodation, meal plans and activities/therapies. Modern day living requires people to make an increasing number of decisions every day, so when checking into a retreat they want to be able to switch off.

Romance isn't dead but corporate retreats might be

When asked who they would like to attend a retreat with the majority of participants (46%) opted to bring their romantic partner along. Men were the demographic most in favour of this: 60.8% of men would rather travel with a romantic partner, compared to 43% of women. Additionally, when it came to favoured retreat types, men ranked romantic marriage and couples' retreats fourth (after fitness, yoga and spa). While a corporate retreat might sound like a good idea, only 0.4% of respondents were interested in going on a retreat with their colleagues.

Yoga, fitness and spa retreats are the most popular types of wellness retreats

Yoga (17.8%), fitness (17.1%), and spa retreats (16.5%) were the most popular retreat types overall, followed by anti-stress (9.7%) and detox retreats (8.1%) in fourth and fifth place.

Digital detox and WiFi indifference

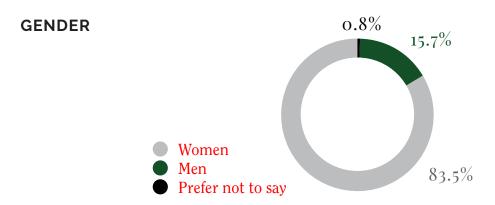
Only 1.2% of survey respondents were interested in a digital detox retreat, and attitudes towards WiFi were indifferent: having WiFi throughout the resort (6.9%) or WiFi free zones (5%) were of little interest, while a WiFi-free retreat (7.1%) is less in demand than the digital detox trend would suggest.

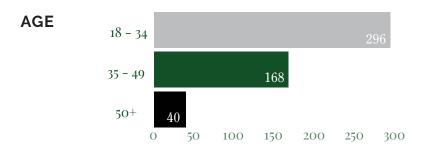
Weight loss is no longer the main concern

Only 2.8% of respondents were interested in weight-loss retreats. The popularity of yoga, fitness and spa retreats as well as adventure sport activities reflects the wellness travellers' changing focus towards fitness and overall health

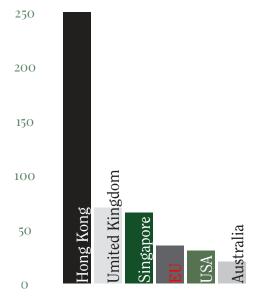
SURVEY DEMOGRAPHICS

Survey participants were asked their age, gender and country of residence to help establish trends in different demographics.





COUNTRY OF RESIDENCE



PART ONE

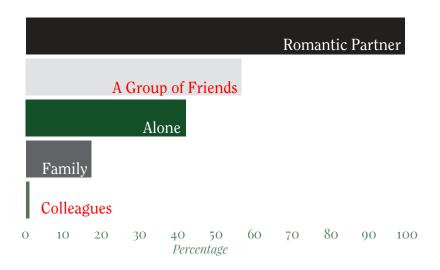
WELLNESS TRAVELLER HABITS



Who are our wellness travellers?

WHO ARE THEY TRAVELLING WITH?

Wellness travellers have indicated most interest in travelling with a romantic partner (46%), while travelling with colleagues ranks least (0.4%).



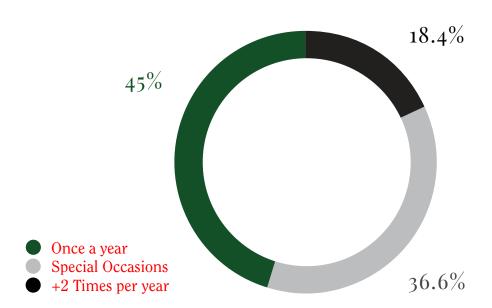
60.8% of men would rather travel with a romantic partner, compared to 43% of women

Women ranked friends as their second option (29.5%) after a romantic partner, while travelling alone fell third (20%), and family fourth (7.4%).

Men would rather travel alone (17.7%) than with family (11.4%) or even friends (8.9%). As a female-dominated space, it seems that wellness retreats have much to do to convince groups of men to seek out wellness retreats for their 'boys' holidays'.

HOW OFTEN ARE THEY TRAVELLING?

The wellness travellers we surveyed show 45% of those who have attended retreats going annually, while 36.6% of retreat-goers are only looking for retreats on special occasions. Of the surveyed audience who attend retreats, 18.4% attend retreats two or more times per year.



The over 50s group were the most likely to only travel for a special occasion (58.3%). Combined with their interest in travelling with friends, there is a strong market for more mature group holidays to celebrate birthdays and anniversaries.

WHAT KIND OF RESORTS DO THEY WANT?

		All	-Inclusive	
0	25	50	75	100

Survey respondents were asked about their preference for all-inclusive packages, and overwhelmingly voted in favour of them: 78% of wellness travellers prefer to have all accommodation, treatments, food and beverage, and activities included in the price.

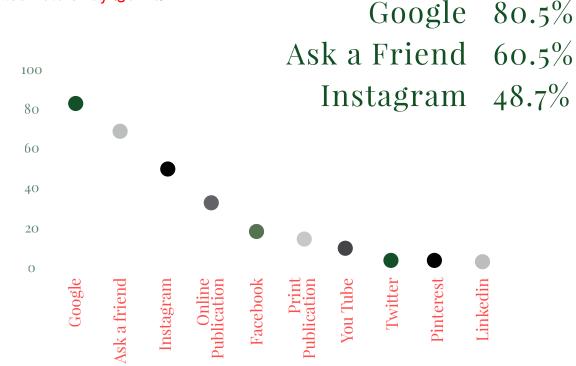


The plastic-free movement continues to grow in strength and wellness travellers are fully on board. 89.5% of respondents indicated that they prefer wellness retreats with plastic-free policies, demonstrating the need for wellness retreats to be acutely aware of sustainability and eco-friendly policies.

Women were more concerned with environmental issues: compare 90.7% of respondents preferring plastic-free policies to 82.3% of men.

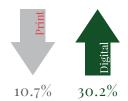
HOW DO THEY FIND RETREATS?

Survey respondents were asked to select their top three ways of researching a retreat before booking: Google Search (80.5%), Ask a Friend (65.6%), and Instagram (48.7%). Just missing out on the top three overall, online publications also hold sway (30.2%).



Google 70%
Ask a Friend 62.5%
Online Publications 30%

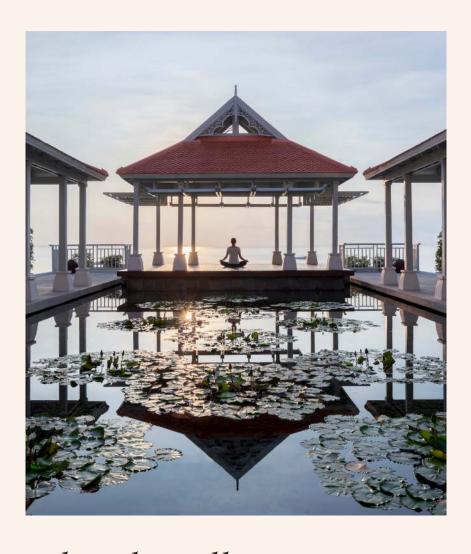
The 50+ demographic deviated from other demographic groups, with respondents relying almost as much on recommendations from friends (62.5%) as a Google search (70%). The 50+ group ranked Instagram sixth, with online publications coming in third instead (30%), demonstrating the need for resorts to vary their approach and not rely solely on social media to reach more mature audiences.



Print publications ranked below Facebook (15.9%) in terms of influencing travellers' choices, with only 10.7% of the overall vote (and only 6.8% of Millennials' vote). This indicates that advertisers and retreats would be better investing money in online publications and well-crafted Instagram marketing plans.

PART TWO

RETREAT TRENDS



What do wellness travellers want?

WHERE DO THEY WANT TO GO?

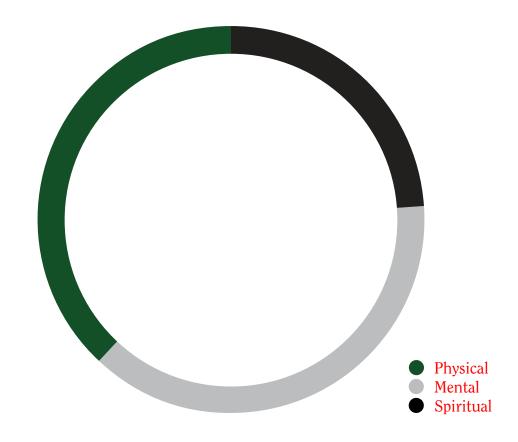
The Wellness Traveller's Bucket List

The Maldives	45.4%
Bali	42.9%
Thailand	34.5%
The Philippines	27.6%
Sri Lanka	18.5%
New Zealand	16.7%

The lowest ranking destinations were China, the UAE and UK, indicating that despite claims China is the next big wellness travel market, international wellness travellers lack interest.

UK	2.4%
UAE	1.4%
China	1%

WHAT IS THEIR WELLNESS FOCUS?



Mental health has become the primary focus of the wellness traveller, with 62.9% of readers selecting it as top priority. This shows a shift away from the focus of retreats for body-shaping, weightloss and fitness training.

Millennials ranked mental health far higher than other demographics, with 67.2% ranking it as first compared to 57.7% of Gen X and only 52.5% of the 50+ group.

Overall, physical health was ranked first by 24.4% of respondents, and second by 57.9%, showing it continues to be important to many wellness travellers. Spiritual health ranked last, with 75.8% respondents selecting it as lowest priority.

WHAT RETREAT TYPES DO THEY WANT?

Overall

Yoga and Meditation	17.9%		
Fitness		Men	
	- /		20.3%
Spa Retreats	16.5%	Spa Retreats	
Anti-Stress	9.7%	Yoga and Meditation	13.9%
Detox Retreats	Q 10/2	Romantic Anti-Stress	10.1%
Down Houreas	0.1/0	71111-511055	10.1%

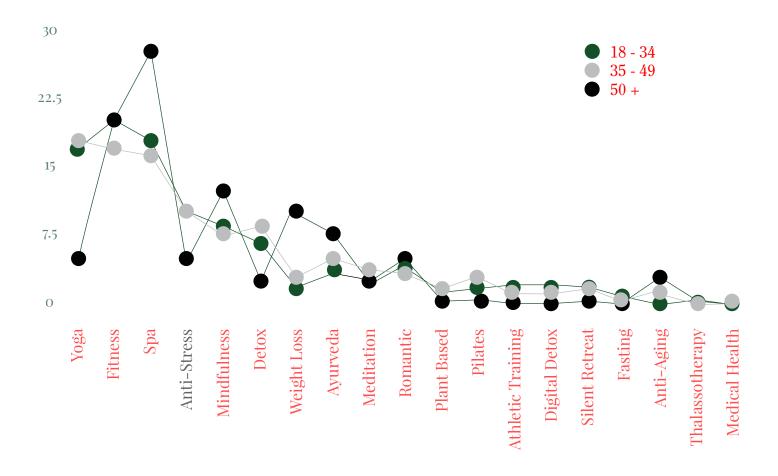
Yoga, meditation, fitness and spa retreats were the most popular retreats overall, followed by anti-stress and detox retreats in fourth and fifth place respectively.

The results for women mirrored the overall results, whereas for men, fitness and spa outranked yoga while romantic, marriage and couples' retreats was their fourth top retreat: 10.1% of men would choose to go on a romantic retreat, compared to just 2.1% of women, who ranked it 11th in retreat types.

While anti-stress stayed out of the top three, its consistent appearance in the top five across all age groups and genders points towards it being an important theme in retreats for 2019.

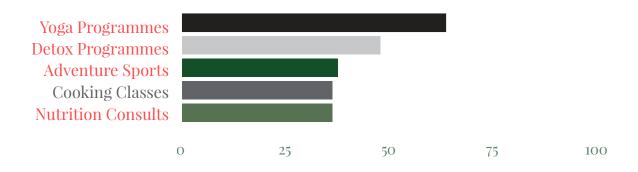
WHAT RETREAT TYPES DO THEY WANT?

When looked at by age, Millennials (18-34), Gen X (35-49) and the 50+ had varied responses to their favoured retreat types. Fitness ranked highest for Millennials, while Gen X favoured yoga and 50+ preferred spa. The extreme differences in preferred retreat types can help retreats understand who their target audience is.



WHAT RETREAT FEATURES AND FACILITIES ARE IN DEMAND?

Survey respondents were asked which features and they would most like to see at a wellness retreat. The top five included yoga and meditation programmes, detox programmes, private nutrition consultation sessions, adventure sports, and cooking classes.



VARIATIONS BY GENDER

While yoga and meditation remained top for both men and women, it's worth noting that the rest of their top five favourite features or activities at a retreat varied significantly.

Women		Men
Yoga and Meditation	1^{st}	Yoga and Meditation
Detox Programmes	2 nd	Adventure Sport
Cooking Classes	$3^{\rm rd}$	Detox Programmes
Private Nutrition Consult	4 th	Medical Checkups
Adventure Sport	5 th	Sleep Therapies

VARIATIONS BY AGE

There was a notable difference between what the three age groups valued, with Gen X placing greater importance on sleep therapies and medical checkups, while the 50+ places cultural excursions in second place.

18 - 34	35 - 49	<i>50+</i>
Yoga & Meditation Detox Programmes Adventure Sports Cooking Classes Private Nutrition Consultations	Yoga & Meditation Detox Programmes Adventure Sport Cooking Classes Private Nutrition Consultations	Yoga & Meditation Cultural Excursions Detox Programmes Private Nutrition Consultations Sleep Therapies

Overall, both WiFi throughout the resort (6.9%) and WiFi free zones (5%) were of little interest, while a WiFi-free retreat (7.1%) is less in demand than the digital detox trend would suggest. Having doctors onsite ranked the lowest of the facilities (2.8%).

WHAT RETREAT TYPES ARE LEAST POPULAR?

The least popular retreat types were: athletic training, silent, fasting, medical health, and thalassotherapy retreats: the specialised nature of these retreats could be a factor.

Retreat types that were expected to be popular but underperformed include weight loss, Pilates, and this year's biggest trend, the digital detox retreat.

Wellness retreats are no longer just about losing weight, and the survey results reflect the wellness travellers' changing focus towards fitness and overall health.

0%	Thalassotherapy
0.2%	Medical Health
0.4%	Fasting
1%	Athletic Training
1%	Silent
1.2%	Digital Detox
2.6%	Pilates
2.8%	Weight Loss

IN BRIEF

TOP TAKE AWAYS

- Google search, Instagram, and friend referrals are key channels
- Mental health is the new wellness priority
- Plastic-free policies influence wellness travellers' decisions
 - The Maldives, Bali and Thailand are the three most desirable destinations
 - All-inclusive packages are preferential
 - Romance isn't dead but corporate retreats might be
 - Yoga, meditation, fitness and spa retreats are the most popular types of wellness retreats
 - Wellness travellers appear to be indifferent to digital detoxes and no WiFi zones
 - Weight loss is not a primary goal for wellness retreat travellers



COMPARE RETREATS

ABOUT

Compare Retreats is the booking portal and online publication for the world's leading luxury wellness retreats that have been vetted by certified health and fitness professionals.

This report was researched, written and edited by Compare Retreats Founder Dervla Musgrave and Compare Retreats Editor Rebecca Cairns.



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