



ACCOR

IT'S A **WELLNESS** WORLD

THE GLOBAL SHIFT SHAKING UP OUR BUSINESS

---

DECEMBER 2019

# CONTENTS

**FOREWORD**  
It's time to take wellbeing  
as seriously as our guests

**P. 3**

**1**

**GOOD FOR GUESTS**  
Expectations for wellness  
experiences continue to rise

**P. 5**

**2**

**GOOD FOR BUSINESS**  
Wellness attracts higher-value,  
more frequent customers

**P. 10**

**3**

**GOOD FOR ACCOR**  
Wellness serves the  
group's image & strategy

**P. 13**

**5**

**WELLBEING AT ACCOR**  
Highlights

**P. 18**

**4**

**SUMMARY**

**P. 16**

**WELL  
NESS**

# FOREWORD

BY **EMLYN BROWN**  
VICE PRESIDENT WELL-BEING  
LUXURY & PREMIUM BRANDS

As we enter 2020, it's time to rethink wellness.

The 'wellbeing state of mind' has changed the way people, from millennials to silver surfers, think, consume - and travel.

Across these generations, across social media platforms like Instagram, their focus is on health before all else. There's no room for denial in any industry, but especially in ours, which is so fundamentally connected to wellbeing.

It's time to reassess the value of wellness: its role within our operations, our Group's image and, most importantly, how we calculate the ROI of

our investment in wellness activities.

With our colleagues in Consumer & Market Insights (CMI), we've crunched the data to explore and anticipate consumers' expectations for wellness experiences. And what the payback is for business.

The data shows we need to make wellness the standard, not the add-on. And we need to think bigger: beyond the gym, beyond the spa, and beyond granola and chia seeds for breakfast.

Because the modern luxury traveler of now - and the future - is on a journey: to find purposeful new travel

experiences that speak to their inner self and to personal fulfilment. And they're willing to pay a premium for it.

What's more, the data shows that how well we meet their wellness needs influences how 'delighted' they feel about their hotel stay; and how likely they are to return.

It is a dynamic chapter across Accor to make wellbeing activities a companywide imperative. How much we truly invest in wellness, how we integrate feeling better into the entire customer journey so our guests can stick to their healthy habits in-hotel as they do at home, and how we provide spaces for them to discover new ones. It's an exciting time as we look to shore up our future business health.

Wellness is a lifestyle goal and it's here to stay. And if we're as committed as our guests are, if we can give them new wellness experiences, they'll be here to stay too.





# FOREWORD

BY **FRANÇOIS DUNG**  
SENIOR VICE PRESIDENT  
CONSUMER & MARKET INSIGHTS

## **Welcome to the wellness age.**

The changes over the past decade have been fascinating to observe. Through our studies into human behaviour, at CMI, we've seen the growing desire to live healthier evolve into one of the most powerful cultural shifts of this second decade of the 21<sup>st</sup> century.

What emerged as a trend has become a way of life in itself. Once approached in short bursts as an antidote to the negative impacts of modern existence, a healthy lifestyle has become the very definition of successful living. Today, wellbeing is a positive opt-in, rather than a quick-fix opt-out of stress.

Our role at CMI is to bring our understanding of today and tomorrow's consumer into the heart of business decisions at Accor. In this report, we've pooled data from our own guests' behaviour and our hoteliers' insights, with external research from consumers worldwide. Together with market observations of the most inspiring wellness innovations from other brands, we've weighed up the commercial advantage of wellness and how this can inform the group's strategy in this White Paper.

As we go into the 2020s, what challenges can we anticipate? In a world waking up every

day to greater environmental urgencies, as technology continues to impact our lives for good and for bad, consumers' approach to wellness will continue to evolve.

As the market grows ever more sophisticated, to stand out we will need sharply positioned wellness propositions to bring value to each of our brands. New dimensions of wellness will emerge, and existing ones will evolve. Healthy nutrition, for example, is already a highly developed, multi-faceted offer; we can expect other areas of wellness, such as sleep and design, to grow more important and nuanced too.

No longer a trend, no longer an option. No longer a commitment just at home, or in waking hours; wellness is the standard our guests have come to expect. At CMI we're delighted to help our brands and business not only meet these standards but also stay ahead into 2020. At Accor, wellness is our world. Let's own it.

1



**GOOD FOR**  
**GUESTS**

*Expectations for  
wellness experiences  
continue to rise*

“  
Is there  
a jacuzzi  
in the room?  
”

**WELLNESS  
IS THE NEW  
STANDARD**



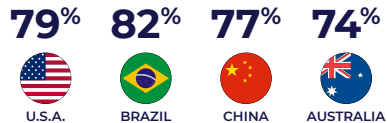
Behind the mind-body headlines, the smoothie bowls and pilates poses, wellness is simply the state of being in good health as an actively sought lifestyle goal <sup>1</sup>.

When it comes to wellness, consumer research confirms a fundamental societal shift underway: feeling healthier as a lifestyle goal has well and truly entered the mainstream.

**BEING HEALTHY  
A DAILY AMBITION**



TAKE STEPS IN DAILY LIFE TO STAY HEALTHY, SUCH AS EATING IN MODERATION, GETTING EXERCISE, MANAGING STRESS



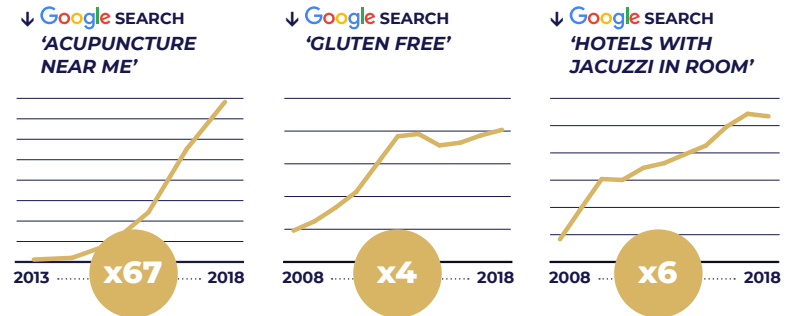
**HEALTH, OR ELSE  
WELLBEING IS THE No.1 GOAL  
FOR THE COMING YEAR**



'I'M STRIVING TO BECOME HEALTHIER IN THE COMING YEAR'  
(2<sup>ND</sup> AND 3<sup>RD</sup> TOP CHOICES WERE: 'SPEND MORE TIME WITH MY FAMILY' & 'GO SOMEPLACE NEW')



**Google TRENDS DATA SHOWS  
'WELLBEING' SEARCHES ON THE UP <sup>4</sup>**



**What is Google Trends?** By analyzing what people are searching for on Google, Google Trends shows us the relative popularity of search terms over a certain period of time. What you see in the charts above is not the total volume of searches for a particular term, but rather how popular that search has been, compared to the total volume of searches on Google. To ensure data is relevant, we have filtered it by specific categories (e.g. Health, beauty, fitness, food & drink, etc.). See notes at end for further details of filters used.

“  
*I experience  
therefore  
I am*  
”

**WHY  
WELLBEING  
IS HERE  
TO STAY**

The top wellness trends – the must-try fitness techniques, the miracle superfoods – may come and go, but our underlying desire to get healthier is here to stay. As is the willingness to pay for wellness products and services to help us do so.

That’s because the profound economic & social factors driving wellness aren’t going anywhere...



**4 ECONOMIC & SOCIAL FACTORS  
DRIVING THE RISE OF WELLNESS**

**UNHEALTHY  
MODERN LIVING**

Hyper-connection, pollution, congestion, industrialized food, sedentary office work: modern living is taking its toll on our health.



**IN 2018,  
30% OF  
PEOPLE**  
WORLDWIDE REPORTED FEELING UNHAPPY (PAIN, WORRY, STRESS) FOR MUCH OF THEIR PREVIOUS DAY. THAT’S ALMOST ONE IN EVERY THREE OF US <sup>5</sup>

**HEALTHCARE  
FOR AGEING  
POPULATIONS**

The rising healthcare costs of an ageing population is driving an increased focus on prevention, through lifestyle changes to promote wellbeing into old age.



**HEALTHCARE  
SPENDING**  
IS GROWING FASTER THAN THE ECONOMY IN MOST COUNTRIES, AND OVERALL WORLDWIDE <sup>6</sup>

**CONNECTED  
HEALTH**

Technology gives us the tools to track our bodies and what we put in them, putting data at our fingertips to take our health into our own hands.



**57% OF  
CONSUMERS**  
GLOBALLY SAY THEY’RE INTERESTED IN A DEVICE TO TRACK THEIR HEALTH & SEND INFORMATION DIRECTLY TO THEIR DOCTORS <sup>7</sup>

**‘I EXPERIENCE  
THEREFORE I AM’**

The shift from possessions to experiences goes hand in hand with wellness. With its focus on finding new ways to feeling good, wellness, by its nature, meets our desire for greater personalization and more experience.



**72% OF  
CONSUMERS**  
FEEL THE NEED FOR NEW EXPERIENCES IN THEIR LIFE <sup>8</sup>

“  
Are the curtains air-purifying?  
”

**WHY GROWING ANXIETY ABOUT THE ENVIRONMENT TAKES WELLNESS CONCERNS BACK TO BASICS**

Even where living standards are high, today's environmental context is calling into question health fundamentals such as clean water and air. Media headlines and emotive brand campaigns mean guests may have these concerns on their minds when they visit our hotels. Not just spas and workouts, wellness for consumers is also about rethinking our health from the basics up.



**INDOOR POLLUTION**

The risks of outdoor pollution are generally well-established; recently consumers' attention has also been drawn to the risks of indoor pollution and its health impact, with some major brands taking on the subject.

↓  
**VELUX'S INDOOR GENERATION CAMPAIGN CLAIMS THAT INDOOR AIR CAN BE 5 TIMES MORE POLLUTED THAN OUTDOOR AIR**

↓  
**IKEA INNOVATES WITH THE AIR PURIFYING CURTAIN "GUNRID"**

**MICROPLASTICS IN OUR WATER**

The world has woken up to plastic – that it's not only all around us – but actually inside us. The discovery of microplastics in bottled water prompted the WHO to launch a safety review. Consumers are concerned and confused about what is ultimately safe to drink.

STUDY FINDS MICROPLASTICS IN **93%** OF BOTTLED WATER

**325** AVERAGE NUMBER OF PLASTIC PARTICLES PER EVERY LITER OF WATER SOLD



↓ **LOWEST & HIGHEST NUMBER OF PLASTIC PARTICLES FOUND PER LITER OF BOTTLED WATER (LOCATION & BRAND)**

BRAND	PURCHASED IN	LOWEST AND HIGHEST NUMBER OF PARTICLES PER LITRE
NESTLÉ PURE LIFE		0 - 10,390
BISLERI		0 - 5,230
GEROLSTEINER		9 - 5,160
AQUA Danone		0 - 4,713
EPURA Pepsico		0 - 2,267
AQUAFINA Pepsico		2 - 1,295
MINALBA Grupo Edson Queiroz		0 - 863
WAHAHA		1 - 731
DASANI Coca-Cola		2 - 335
EVIAN Danone		0 - 256
SAN PELLEGRINO Nestlé		0 - 74



“  
We should  
have built  
a bigger spa

HOTELIER



**WHY  
WELLNESS  
MUST  
NO LONGER  
BE AN  
ADD-ON**

## \ Our Challenge \

### KEEPING UP WITH RISING EXPECTATIONS

WELLNESS IS NOT AN OPTION  
IT'S THE STANDARD TODAY'S GUESTS EXPECT

CAN HOTELS KEEP UP WITH  
GUESTS' GROWING WELLNESS EXPECTATIONS?

CONSUMER  
FEEDBACK

It's become so important to help our kids eat healthily now, we make a lot of effort at home. Then when you go on holiday, you lose control because kids' menus are all ice-creams and fried food. <sup>10</sup>

LUXURY  
HOTELIER  
FEEDBACK

We've definitely seen guests grow more demanding with wellness over the years. What was exceptional 10 years ago is just standard now. If I'd known 10 years ago, I would have built a bigger spa. <sup>11</sup>

BUSINESS TRAVEL  
MEANS PUTTING YOUR HEALTH ON HOLD.  
FOR HOW LONG?



BUSINESS TRAVELERS

54%

I'm **less likely to WORK OUT** on a work trip than at home. <sup>12</sup>

44%

I'm **more likely to EAT UNHEALTHY FOODS** on a work trip than at home. <sup>13</sup>

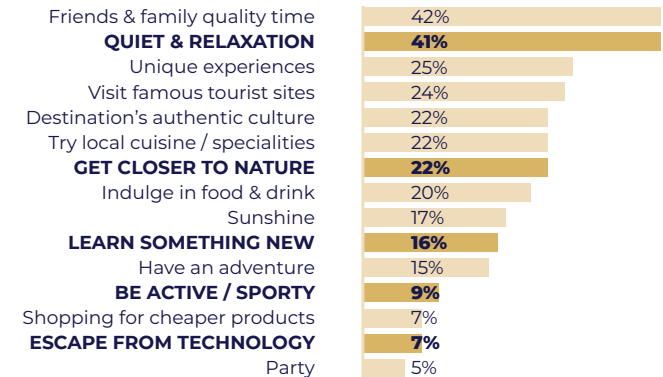
## \ Our Opportunity \

### LEVERAGING THE POTENTIAL OF WELLNESS

HOTELS ARE NATURAL HOMES FOR WELLNESS  
AND WELLNESS COMES WITH PAYBACK

CONSUMERS ALREADY TRAVEL TO FEEL BETTER

↓ WHAT CONSUMERS LOOK FOR IN A HOLIDAY <sup>14</sup>



MANY MOTIVATIONS FOR TRAVELLING ARE SYNONYMOUS WITH WELLNESS

WELLNESS IS TODAY A STATUS SYMBOL

Health is the new wealth, as evidenced  
by the number of celebrities creating wellness brands.

→  
Jessica Alba launched *The Honest Company* selling natural baby products in 2011.

Other examples of celebrity wellness brands include Kate Hudson's *Fabletics* sportswear brand and Gwyneth Paltrow's *Goop* lifestyle brand.

© Jessica Alba, image by TechCrunch, image licensed under the Creative Commons Attribution 2.0 Generic license



2

GOOD FOR  
**BUSINESS**

*Wellness attracts  
higher-value, more  
frequent customers*



*I love to exercise, and eat healthy [...]*

*Not many hotels cater for health-conscious eaters [...]*

*I will only stay here from now on*

CUSTOMER REVIEW <sup>15</sup>



**WHY  
WELLNESS PAYS  
FOR OUR GUESTS  
AND US**

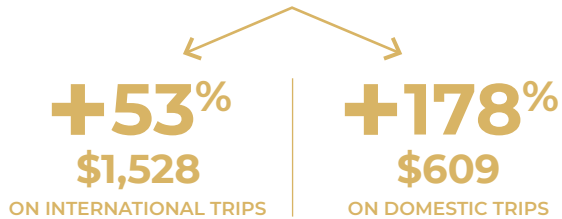


1

**WELLNESS-SEEKING TRAVELERS SPEND MORE**

Wellness travelers far outspend the average tourist. With their promise of a healthier, happier, safer self, wellness products and services typically command a premium, attracting those willing & able to pay it.

COMPARED TO THE AVERAGE TOURIST  
WELLNESS TRAVELERS' PER-TRIP SPEND <sup>16</sup>



“Wellness travelers are very high-spending, high-yield tourists”

GLOBAL WELLNESS INSTITUTE

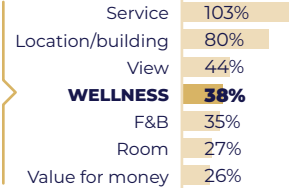
2

**WELLNESS HELPS CREATE THE MOST 'DELIGHTED', FREQUENTLY RETURNING GUESTS**

Accor's data scientists analyzed what makes a highly satisfied customer from millions of comments sourced from review sites & GSS surveys. They also looked at booking behavior to determine whether “delighted” customers were more likely to return than neutral or dissatisfied customers.

**WHAT MAKES A 'DELIGHTED' CUSTOMER? <sup>17</sup>**

DELIGHTED = THOSE SCORING 90-100 IN OVERALL SATISFACTION QUESTIONNAIRES



Customers who gave positive feedback about wellness were 38% more likely to give their hotel a top overall satisfaction score.

A delighted guest is

**+14%**

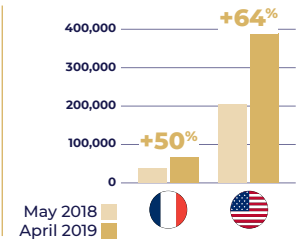
more likely to return than an average guest <sup>18</sup>

3

**WELLNESS IS OUR 'IN' TO A GLOBAL, GROWING CONVERSATION**

Visual, aspirational and spanning many sectors: from food to fitness, wellness feeds 8.5 million conversations a month. Fueled by dynamic, innovative brands and star wellness influencers.

**8.5 MILLION**  
WELLNESS CONVERSATIONS ON SOCIAL MEDIA EVERY MONTH



**RISING WELLNESS TOPICS ON SOCIAL MEDIA**  
MONTHLY MENTIONS OF WELLNESS TOPICS <sup>20</sup>

Tap into wellness messaging and you're tapping into a thriving ecosystem of already engaged users.

**EXAMPLES OF HIGH-PERFORMING WELLNESS BRANDS & INFLUENCERS**

(Numbers of followers/subscribers taken in November 2019)



**YOGA WITH ADRIENE**  
5.51 MILLION SUBSCRIBERS



**JEN SELTER**  
12.7 MILLION FOLLOWERS



**LULULEMON**  
3 MILLION FOLLOWERS



**DELICIOUSLY ELLA**  
1.6 MILLION FOLLOWERS



**THE BODY COACH**  
3.3 MILLION FOLLOWERS



**CALM**  
1.4 MILLION FOLLOWERS

3



**GOOD FOR**

**ACCOR**

*Wellness serves  
the group's  
image & strategy*





*We have transformed Accor from a hotel group into a holistic ecosystem of hospitality services [...] By integrating new businesses, we continuously redefine hospitality*

SÉBASTIEN BAZIN



**WHY WELLNESS IS A NATURAL BOOST TO ACCOR'S TRANSFORMATION**



1

**AN OBVIOUS, LEGITIMATE WAY TO DIVERSIFY**

The wellness boom is fueled by a large dose of innovation and cross fertilization between all sorts of sectors, from coffee to cars. Accor has a strong and legitimate role to play here: travel, hospitality & wellness go hand in hand.

This organic intersection provides Accor with fertile territory for diversification & synergies, with crossover in both directions. It gives Accor a great angle through which to enrich the in-hotel experience – and also natural paths to branch out into other sectors.

**CROSS-FERTILIZATION BETWEEN SECTORS IS DRIVING INNOVATION IN WELLNESS**

**APPLE GETS INTO THE SLEEP BUSINESS**

In 2017, Apple bought beddit, the sleep tracking device that lives beneath your bedsheet, a sign of a move into the sleep tracking market.

**SOHO HOUSE'S COWSHED EXTENDS THE BRAND INTO SPAS AND PEOPLE'S BATHROOMS**

Wellness is now an integral part of the Soho House experience. And the members clubs have also branched out with Cowshed spas & bodycare products.

**EQUINOX OPENS A HOTEL TO EXTEND ITS WORLD OF LUXURY WELLBEING**

Hitting the gym hotel. High-end gym chain Equinox has opened its own hotel in New York so guests can keep up their health commitment in a wholly glamorous way.

2

**WELLNESS IS A WAY TO REACH CUSTOMERS IN THEIR DAILY LIVES... & GIVE THEM REASONS TO REMAIN WITHIN ACCOR'S ALL LOYALTY ECOSYSTEM**

Accor's move to a service-oriented business model is built on the idea of engaging our customers outside of their hotel stay and helping with things in their life that they really care about.

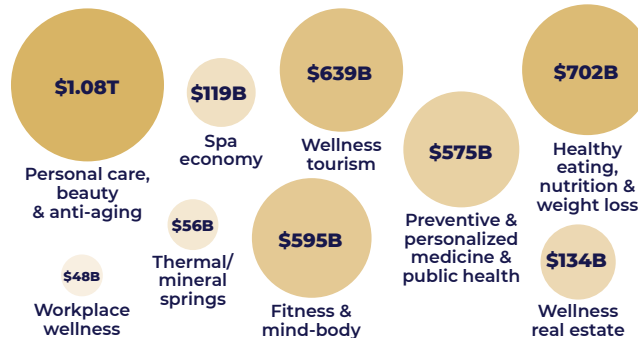
**Wellness is a golden opportunity here:** it is a universal, emotionally charged and frequent concern for all sorts of customers, cutting across all areas of life, from the daily routine to the exceptional.

**HOTEL SPAS ALREADY OFFER WELLNESS FOR A DAY**



**COUNTLESS MORE OPPORTUNITIES EXIST IN WELLNESS, ACROSS CONSUMERS' DAILY LIVES**

**ESTIMATED MARKET SIZES FOR WELLNESS INDUSTRY SEGMENTS <sup>22</sup>**



3

**WELLNESS: A POWERFUL MESSAGE**

The power of wellness messaging is that it addresses our key human needs in an emotional, sensual and positive way.

Embracing wellness promises a healthier, fulfilled, relaxed and more confident self, without the punitive elements such as fear, guilt or loss of control that can come with other health-related conversations such as dieting.

Put simply, a happy message for Accor.



A black and white photograph of a person's legs and arms as they use a foam roller on a wooden floor. The person is wearing athletic shorts and sneakers. A yellow circle with the number '4' is overlaid on the top right of the image.

4

# SUMMARY

*The Wellness Payback:  
Benefits span hotel  
ecosystem and beyond*





5



**WELLBEING  
AT ACCOR**

# HIGHLIGHTS



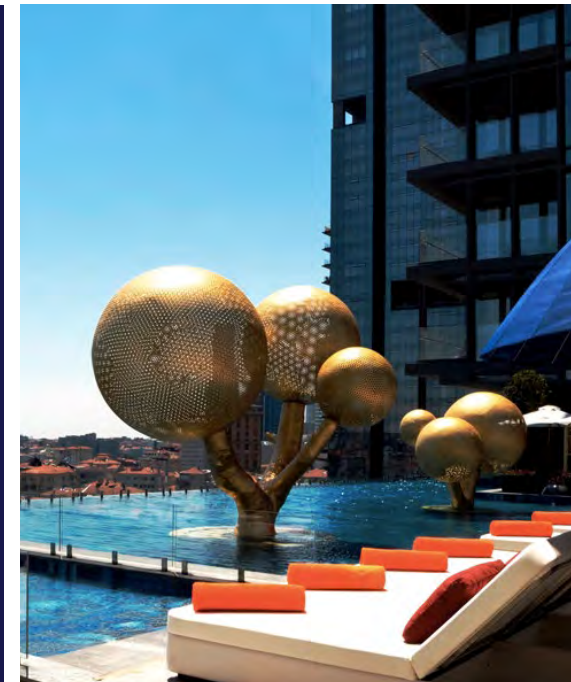
# Fairmont

**FAIRMONT QUASAR ISTANBUL,** home to the first Willow Stream Spa in Turkey and in collaboration with Mindfulness Academy welcomes guests with a new corporate wellbeing program, to gain a conscious awareness approach to life and help handle daily anxieties with ease. The half day Mindful Moments program is designed to improve work-life balance and improve efficiency for business travelers.



“  
The high point of the experience has been the Spa. My daughter and I spent 3 hours being pampered. Never having had a “Hamman” before, it’s a wonderful experience.  
”

TRIPADVISOR REVIEW





### PULLMAN SAINT PANCRAS

has launched its athlete-inspired Running Club partnering with renowned fitness expert and Technogym Global Master Trainer offering hotel guests the chance to train like elite athletes in one of the most notable areas in the capital.

In addition, Pullman Hotels&Resorts continues to expand its wellness program with Bootcamp, a new series of videos on YouTube, designed by the brand's wellness coach, Sarah Hoey.



“  
*My surprise was how nice the fitness room is: clean, modern machines (including a great spin bike), plenty of equipment for core exercises and weight training, and high ceilings, floor-to-ceiling windows and a great view. I didn't feel like I was missing out on London by getting my workout in.*  
”

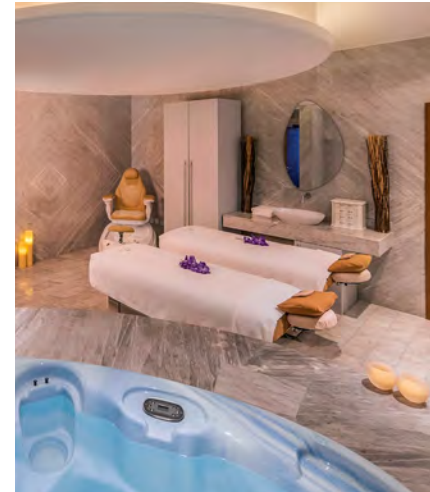
TRIPADVISOR REVIEW





“  
I was aiming to relax  
for my vacation and found  
the right place with this hotel.  
I took a meditation class there.  
The wellness spa is the best thing  
to go and relax.  
”

TRIPADVISOR REVIEW



**THE RETREAT PALM DUBAI  
MGALLERY HOTEL  
COLLECTION**

Home to the world's first Riya Wellness Centre, the programs are customized to a guest's particular health interest and length of stay. They include: Revive with the Emotional Wellness Retreat; Rebuild with the Weight Management Retreat; and Reshape with the Fitness Retreat.





# Fairmont

**FAIRMONT GRAND DEL MAR,** the only Forbes Travel Guide spa granted Five Stars, launched Dr Burgener, luxury Switzerland skin care concept and treatment line, becomes the second location within the United States to carry the premium brand and offer signature treatments, which have already attracted widespread attention worldwide.



“  
This property has an amazing Spa. If ever there is a place where you'd want to splurge and treat yourself to an incredible treatment, their 2-hour 'Decompression' treatment is unbelievable  
”

TRIPADVISOR REVIEW

### BESPOKE EMOTIONAL WELLBEING

Bespoke experiences to enhance guests' emotional wellbeing bringing them serenity, harmony and pleasure.

#### HIGHLIGHTS

- PEACEFUL ENVIRONMENTS DESIGNED USING FENG SHUI AND BIOPHILIA TECHNIQUES
- FOOD CREATED TO ENHANCE SLEEP, COUNTER THE EFFECTS OF JET LAG AND PROMOTE GUT HEALTH
- SLEEP RITUALS INCLUDING AROMATHERAPY AND LUXURIOUS SLEEP MASKS



### WELLBEING BURSTING WITH ENERGY AND CREATIVITY

Balance for those who live fast and play hard. Wellness that restores energy and zest for life.

#### HIGHLIGHTS

- GLOW BAR WITH THE LATEST IN SKIN AND BEAUTY TREATMENTS, EXPERIMENTAL SPA TREATMENTS AND FACE+ FACIALS
- DEEP BEATS YOGA



### FIT. STRONG BODY. CLEAR MIND. FULL SPIRIT

The gateway to hundreds of well being experiences, from heart racing workouts to heartfelt moments of peace.

#### HIGHLIGHTS

- GEAR-LENDING PROGRAMME
- GREENERY TO RECONNECT GUESTS TO NATURE
- SUSTAINABLE DRINKING WATER
- HIGH-QUALITY ORGANIC & LOCAL FOOD



**IGNITING GUESTS' INNER SPARK**

Wellbeing to nourish the soul and empower a balanced lifestyle, in thoughtfully designed spaces.

**HIGHLIGHTS**

IN-ROOM AMENITIES FOR SELF-CARE:  
HIGH QUALITY HAIR EQUIPMENT, FACE WIPES,  
MAKE-UP MIRROR

SIGNATURE TREATMENTS

SELF CARE MANTRAS



**VITALITY**

The Vitality Room, created in partnership with Wallpaper\* magazine, has taken the philosophy to the next level to allow guests to revitalize body, mind and soul.

**HIGHLIGHTS**

CIRCADIAN LIGHTING TECHNOLOGY  
UNIQUELY DESIGNED TO ADAPT  
TO THE GUEST'S CIRCADIAN RHYTHM

IN-ROOM YOGA STATION, AND A WELLNESS WALL  
WITH A CHOICE OF 3 TRAINING MODULES

BLACK-OUT BLINDS, AIR PURIFICATION SYSTEM,  
LIGHTING & SCENT SHOWER OPTIONS,  
VITALITY SNACK BAR & SUPERFOODS



**POWER FITNESS**

Power Fitness is for those who want to stay at the top of their game while having fun. We not only help our guests to keep their wellness routine and to work out efficiently and effectively, we make fitness rewarding and fun.

**HIGHLIGHTS**

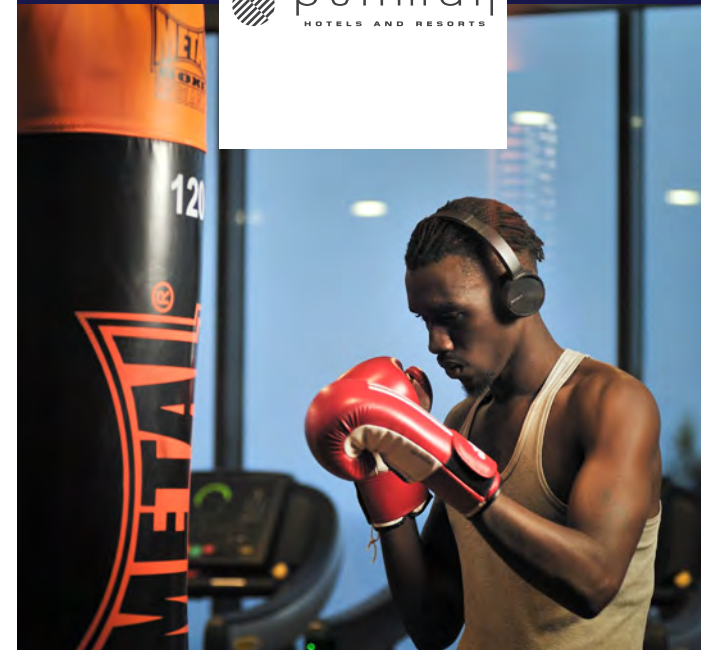
ENERGETIC POWER FITNESS ZONE

BOUTIQUE FITNESS DESIGN CONCEPT

VIDEO ON DEMAND EXERCISE CLASSES

POWER UP F&B MENU

GLOBAL AMBASSADOR FITNESS PROGRAM





# SOURCES

- 1 Merriam Webster
  - 2 Foresight Factory | Base: 26810 online respondents aged 16-64, Global Average, 2018 July.  
The Global Average has been created by taking the average response across the following countries: Australia, Brazil, Canada, China, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Russia, Singapore, South Korea, Spain, Sweden, Thailand, UAE, USA.
  - 3 Affluent Perspective 2018 Year End Report, YouGov
  - 4 The following search parameters were used: "Acupuncture near me": Worldwide; 01/012013-31/12/2018; Health; Web search "Gluten free": Worldwide; 01/01/2008-31/12/2018; Cooking & Recipes; Web search "Hotels with jacuzzi in room": Worldwide; 01/01/2008-31/12/2018; Hotels & accommodations; Web search
  - 5 Gallup 2019 Global Emotions report; Negative experience index
  - 6 World Health Organisation, Public Spending on Health: A Closer Look at Global Trends 2018
  - 7 Net respondents answering "very interested" or "quite interested". Foresight Factory | Base: 5557 online respondents aged 16-64, Global Average, 2016 October. The Global Average has been created by taking the average response across the following countries: China, GB, Germany, Sweden, USA.
  - 8 Net respondents answering "strong need" or "moderate need". Foresight Factory | Base: 29291 online respondents aged 16-64, Global Average, 2019 May.  
The Global Average has been created by taking the average response across the following countries: Australia, Brazil, Canada, China, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, Poland, Russia, South Korea, Spain, Sweden, Thailand, USA.
  - 9 Source: Orb Media  
n = 259 bottles from 11 brands across 9 countries.  
Plastic discovered Included polypropylene, nylon, and polyethylene terephthalate.
  - 10, 11 Qualitative research carried out in 2019 by Accor's Consumer & Market Insights team
  - 12, 13 On Call International travel survey 2017. Findings based on a Google Consumer Survey of 1,000 US frequent business travellers.
  - 14 Foresight Factory | Base: 26810 online respondents aged 16-64, Global Average, 2018 July. The Global Average has been created by taking the average response across the following countries: Australia, Brazil, Canada, China, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Russia, Singapore, South Korea, Spain, Sweden, Thailand, UAE, USA.
  - 15 Guest review taken from tripadvisor.com Review of SO/ Bangkok.  
Review edited for clarity and brevity.
  - 16 Global Wellness Institute, 2018 Global Wellness Tourism Economy. Spend figures are for 2017.
  - 17, 18 Analysis carried out by Accor data analytics team.
  - 19, 20 Linkfluence, The state of wellness on the social web
  - 21 CBRE Trends in the hotel spa industry; data for 2017
  - 22 Global Wellness Institute, Global Wellness Economy monitor 2018
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**THANK  
YOU**

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THE GLOBAL SHIFT SHAKING UP OUR BUSINESS