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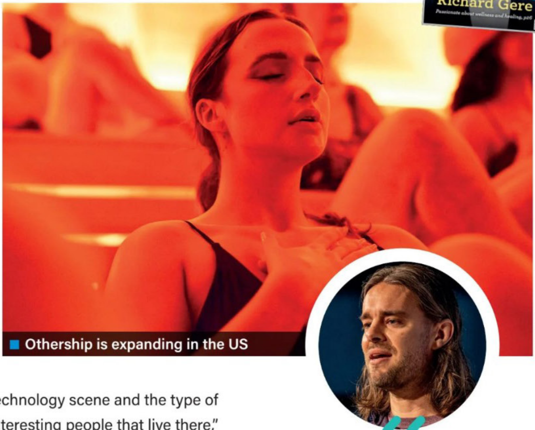
Othership makes a splash in NYC

Urban wellness brand Othership has opened its flagship location in New York City's Flatiron District, marking the first of two planned outposts in the city.



OTHERSHIP

Othership is expanding in the US

OTHERSHIP

Othership destinations combine contrast bathing, breathwork and guided emotional regulation to create a space for people to connect with themselves and their community. Each location offers 28 different classes, featuring large-scale sauna and ice-bath sessions that integrate elements of Aufguss sauna with group therapy techniques .

The Flatiron location boasts a 90-person event sauna, eight ice baths and a fireside sanctuary with amphitheatre-style seating.

"We selected New York because it's the largest city in North America and it's one of the most vibrant cities in the world in terms of the art and technology scene and the type of interesting people that live there," said Robbie Bent, Othership CEO, speaking exclusively to *Spa Business*.

Bent said the team is also eyeing potential destinations in Chicago, Boston, Washington and Miami.

MORE >>> http://lei.sr/U9b4F_B

> We selected New York because it's one of the most vibrant cities in the world
>
> *Robbie Bent*

WELLSCAPE

INNOVATION

Wellscape offering immersive AI naturescapes

Brian Paris announces launch of Wellscape

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Wellness vs wellbeing: consumer research spotlight

Kevin Kelly reveals new research findings

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ELEMENTAL HERBOLOGY

PRODUCT LAUNCH

Elemental Herbology unveils new cooling mask

Formula designed to soothe menopausal skin

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"Lack of standardisation has resulted in unsubstantiated product claims and considerable market confusion

Kevin Kelly, CEO of Civano Advisory Services

CIVANA ADVISORY SERVICES

Well, well, well

A new study investigates consumers' understanding of the concepts of wellness and wellbeing and reveals how they incorporate healthier lifestyle practices in their everyday lives

PEXELS_MARCUS AURELIUS

■ *WELLSurvey* questioned consumers, aged between 25 and 74

The majority of today's consumers now include several health and wellness practices as part of their daily routine, yet have difficulty articulating any differences between the concepts of 'wellness' and 'wellbeing', according to a new study.

WELLSurvey, a US national probability study, is one of the first to examine the health and wellness attitudes, behaviours and intentions of the top half of households in America (as defined by annual income).

Kevin Kelly, CEO of Civano Advisory Services, co-authored *WELLSurvey* with Dr Peter Yesawich, co-founder of leading travel and tourism marketing agency MMGY Global. Kelly says: "The health and wellness industry includes an amalgamation of product, service and experience

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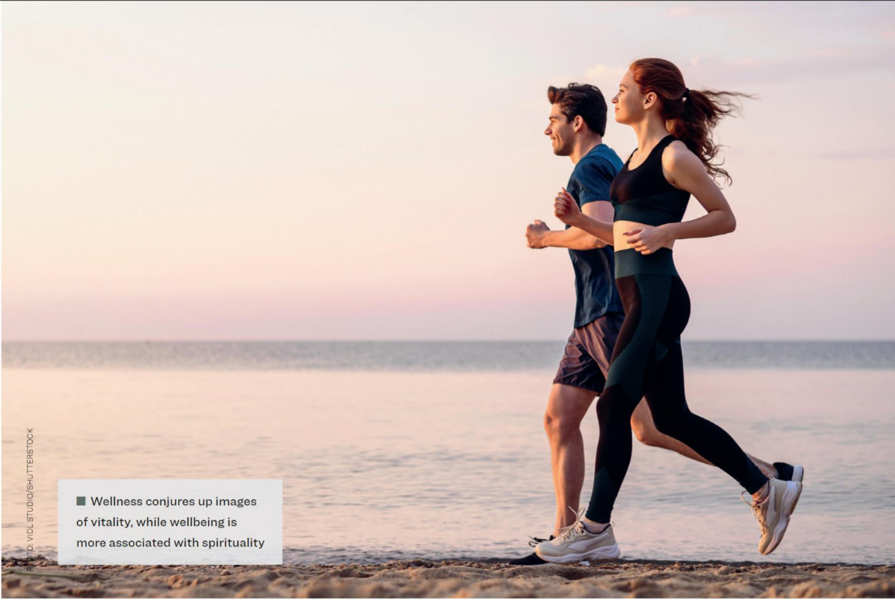

PHOTO: VIDI STUDIO/SHUTTERSTOCK

Wellness conjures up images of vitality, while wellbeing is more associated with spirituality

> Consumers use the terms wellness and wellbeing interchangeably but associate the concepts with different meanings

providers who cater to a broad, yet imprecise, cohort of consumers.

"It's grown in a decentralised manner and, aside from the health sciences, lacks consensus on important standards, performance metrics and terminology. This lack of standardisation has resulted in unsubstantiated product claims and considerable market confusion around terminology. It's also handicapped brands' efforts to build and preserve customer loyalty."

Understanding wellness vs wellbeing

To deconstruct people's beliefs about wellness and wellbeing, *WELLSurvey* questioned 1,002 consumers, aged 25-74, with an average annual household income of US$155,400 (€139,651, £119,249) – representing 88 million American homes. It specifically tested respondents' perceptions of the two concepts via a cluster analysis of 84 attitudinal, behavioural and belief statements/variables.

The results revealed consumers use the terms wellness and wellbeing interchangeably. However, when probed further, it was discovered that consumers associate the concepts with different meanings. Wellness conjures up images of strength and vitality, while wellbeing is more closely associated with peacefulness and spirituality.

A keyword association test revealed the perception of wellness is based on objective, measurable activities and functions that enhance healthier living, such as REM sleep, HVR, heart rate, oxygen intake, cholesterol, blood pressure and mental acuity. Wellbeing, on the other hand, is described in more subjective, aspirational and relational terms that include an emotional component, with 65 per cent of respondents agreeing they measure their wellbeing by "how hopeful, joyful and energised they feel."

Defining the terms

While respondents initially conflated wellness and wellbeing, there was also considerable agreement – 88 per cent and 79 per cent, respectively – when the following definitions of the concepts were introduced:

- Wellness is a state of physical and mental health: you feel fit, energised and vibrant through the pursuit of specific activities, behaviours, choices and lifestyles
- Wellbeing is a state of self-actualisation that derives from your wellness (physical and mental health) and emotional health (how you feel

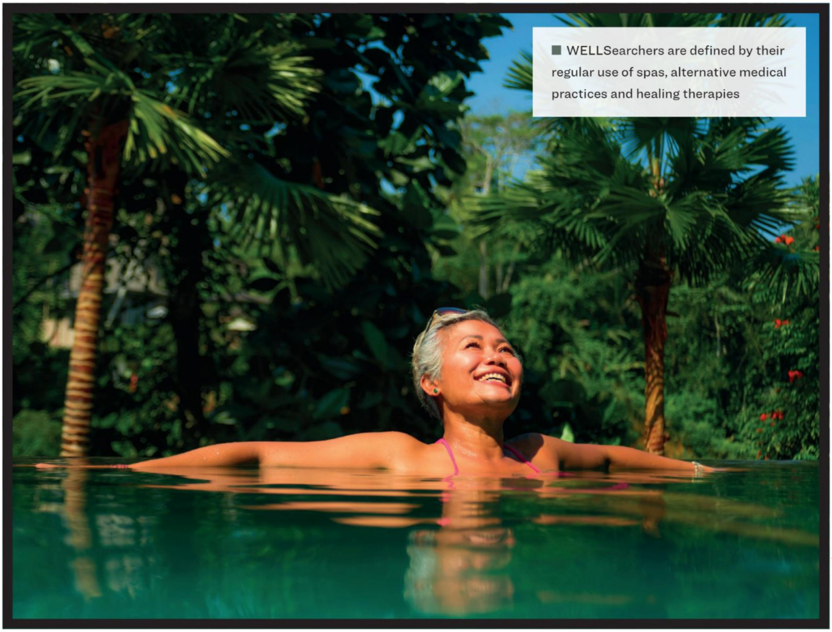

PHOTO: THEVISUALSYOUNEED/SHUTTERSTOCK

about your spiritual awareness, personal and community relationships, career achievements, financial security and environmental factors); you feel happy, healthy, joyful, socially connected, spiritually aware and purposeful through the pursuit of specific activities, behaviours, choices and lifestyles.

"This implies that consistent use of these terms and the related standards would alleviate much of the confusion that prevails in the market today," says Kelly, adding that while most consumers associate wellness with mental and physical health, wellbeing is a broader term covering emotional health, in addition to mental and physical states.

Undiscovered market segments

Respondents then identified the top five drivers of healthier living as improved physical strength, mental health, financial security, emotional state and spiritual beliefs.

The survey highlights that 23 per cent of respondents – representing 20.2 million US, households – prioritise wellbeing over wellness. These individuals see wellbeing as key to longevity, contrasting with wellness, which they perceive as focused on immediate health metrics.

While they certainly value the functional aspects of healthier living found in wellness programmes and services – such as healing touch, food, fitness, mental health and healthier routines – all of which feed into the wellbeing toolkit, they embrace a more integrated approach to life overall.

Perhaps most exciting, further analysis revealed the existence of four unique market segments among consumers:

- **WELLFanatics** – defined by their exercise frequency
- **WELLSearchers** – defined by their regular use of spas, alternative medical practices, and healing therapies
- **WELLTrackers** – defined by use of wearable technology to track and monitor their health metrics
- **WELLZoomers** – defined by their age cohort (25–34-year-olds) and attitudes about healthy living

Each of these segments has distinctive wellness and wellbeing habits, interests and lifestyle profiles which, concludes Kelly "represent key markets for providers to create new products, services and experiences."

Spa Business will offer an exclusive, in-depth exploration of these four segments in its next issue. Be one of the first to find out more by signing up via www.spabusiness.com/signup ●

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spa business

The WELLSurvey™

Evolving From Wellness to Wellbeing,
p.60

SIGN UP FREE

PHOTO: SHUTTERSTOCK/PROSTOCK-STUDIO

PHOTO: SHUTTERSTOCK/PROSTOCK-STUDIO

From wellness *to* wellbeing

A new study unpicks consumer attitudes to wellness and wellbeing and reveals four distinct market segments ripe for innovation. Study co-author Kevin Kelly reveals more

The health and wellness industry comprises product, service and experience providers which cater to a broad yet imprecise cohort of consumers. Wares are delivered through a plethora of channels – from the hospitality sector, spas, fitness centres and spiritual arenas to lifestyle real estate, healthcare and medical institutes and nutritional/food-based businesses.

For all its vibrancy, however, the industry has grown in a decentralised manner and lacks standards, terminology and performance metrics. This has led to market confusion and makes it much harder for product and service providers to communicate genuine differentiation and establish brand loyalty. Consumers question why they should pay more or travel farther for top wellness resorts, for example, if they don't perceive them to offer anything meaningfully different than affordable, local brands.

It's against this backdrop that *WELLSurvey*, a new thought-provoking national probability study, measured the attitudes, behaviours, beliefs and intentions of US consumers towards wellness and wellbeing.

WELLNESS VS WELLBEING

WELLSurvey is co-authored by Civano Advisory Services' CEO, Kevin Kelly, a spa figure with more than two decades of experience and Peter Yesawich, co-founder and former vice chair of leading travel and tourism marketing agency MMGY Global.

PHOTO: KEVIN KELLY

PHOTO: PETER YESAWICH

Study co-authors Kevin Kelly (left) and Peter Yesawich

It's based on 1,002 Americans aged 25-74 who reside in the top half of all homes defined by annual household income – with a mean of US$155,400 (€139,651, £119,249) and median of US$127,500 (€114,578, £97,840). Reflecting the sentiments of 88 million households, the survey indicates the majority of respondents describe themselves as resilient and optimistic about their future but also express concern about the direction of the country and world events. Most now incorporate health and wellness practices in their everyday lives and cite being with family members as their greatest sense of joy.

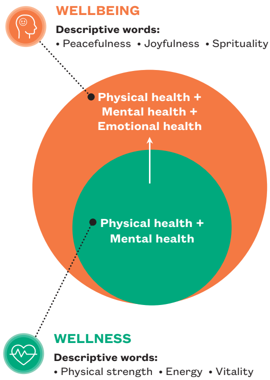
Findings reveal that US adults consider 'wellness' and 'wellbeing' complementary concepts associated with different lifestyle benefits. The former is understood to include objective, measurable activities and functions that enhance healthier living. The latter is a broader term that includes emotional health in addition to mental and physical states. It's associated with more subjective, aspirational and relational terms (see Diagram 1). We explore the relationship between how these two concepts are viewed in more detail in a separate article – see www.spabusiness.com/wellsurvey1.

Significantly, 20.2 million affluent households in the US (23 per cent of respondents) are now more interested in enhancing their wellbeing than wellness. Meaning, that while they value the functional aspects of healthier living found in wellness programmes and services – healing touch, food, fitness, mental health, healthier routines – all of which feed into the wellbeing toolkit, they embrace a more integrated and ethereal approach to healthy living overall.

MARKET SEGMENTS REVEALED

With the US$5.6 trillion (€5.03 trillion, £4.30 trillion) global health and wellness marketplace projected to achieve a compound annual growth rate of 8.6 per cent through 2027, according to the Global Wellness Institute, it's logical to conclude that one size doesn't fit all when targeting today's customers.

Diagram 1: VISUALISATION OF WELLNESS AND WELLBEING*



**Source:* The WELLSurvey © *2024, Civano Advisory Services, LLC*

> *WELLSearchers use one or more spa/alternative medical practices/healing therapies on a regular basis*

WELLSearchers, the largest segment, represent 52.8 million US households

Diagram 2: ADDRESSABLE MARKET: ADULTS INTERESTED IN ENHANCING THEIR WELLBEING*

US households headed by 25-74 YOA, annual HHI >US$75,000**

52.8 million are WELLSearchers	**27.3 million are WELLTrackers**	**15.8 million are WELLFanatics**	**15.8 million are WELLZoomers**
(.60) x (88,160,000) = 52,896,000 HHS	(.31) x (88,160,000) = 27,329,600 HHS	(.18) x (88,160,000) = 15,868,800 HHS	(.18) x (88,160,000) = 15,868,800 HHS

**Source:* The WELLSurvey © *2024, Civano Advisory Services, LLC* ***88,160,000 HHS per 2022 Census data*

Market segmentation is necessary for more effective strategic positioning, differentiation and growth.

To this end, *WELLSurvey* measured people's responses to 84 attitudinal, behavioural and belief statements/variables, plus gathered details about demographics and health metrics. Significantly, it uncovered four unique consumer groups – as outlined below and in Diagram 2 – with distinctive wellness and wellbeing habits, interests and lifestyles.

While the segments have varying, and at times overlapping, characteristics, they present exciting opportunities for industry growth through the development of new products, programmes, services and experiences that reflect their preferences.

WELLSearchers
– 52.8 MILLION HOUSEHOLDS

The largest market segment, representing 52.8 million US households (60 per cent of the overall sample), WELLSearchers are defined by their regular use of spas, alternative medical practices and healing therapies. They are spa and wellness enthusiasts who are optimistic and prioritise their efforts to achieve and maintain a healthy lifestyle. They are significantly more likely than other adults to:

- Have a higher annual household income
- Weigh less
- Take a daily vitamin or supplement
- Have children and pets
- Live in an urban area
- Be racially diverse
- Agree with the following statements:
  - ❖ I love learning
  - ❖ You can accomplish anything if you're determined
  - ❖ I love spending time in nature
  - ❖ My health is priority one

The second largest market segment is the WELLTrackers

WELLTrackers use wearables to track their health metrics

> *WELLFanatics exercise 7 hours or more a week*

PHOTO: SHUTTERSTOCK/4 PM PRODUCTION

WELLFanatics are more likely to have a higher household income

WELLTrackers

– 27.3 MILLION HOUSEHOLDS

WELLTrackers are defined by their use of wearable technology to track and monitor their health metrics and wellbeing. There are 27.3 million WELLTracker households (accounting for 31 per cent of survey respondents) and these adults are significantly more likely than other adults to:

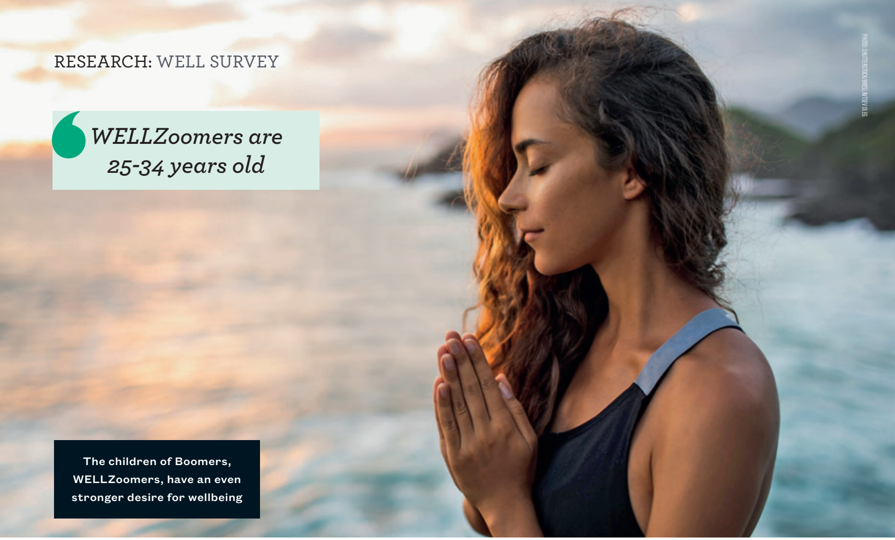
- Collect and monitor their health metrics daily
- Rate their overall health good/excellent
- Have a four-year college degree
- Be employed full-time
- Live in an urban area
- Not have a disability that inhibits them
- Agree with the following statements:
  - ❖ I love learning
  - ❖ I have the energy to do the things I want to
  - ❖ My family is the source of my greatest joy

WELLFanatics

– 15.8 MILLION HOUSEHOLDS

Defined by their exercise frequency, WELLFanatics account for 15.8 million households (18 per cent of all people surveyed). WELLFanatics are highly active physically and embrace a sense of success. They exercise 7 hours or more a week and are significantly more likely than other adults to:

- Have a higher annual household income
- Rate their health good/excellent
- Collect and monitor their health metrics
- Take fewer medications
- Agree with the following statements:
  - ❖ Life's journey is about constantly growing and improving
  - ❖ Integrity is everything to me
  - ❖ I feel empathy towards others
  - ❖ I have a sense of purpose



WELLZoomers are 25-34 years old

The children of Boomers, WELLZoomers, have an even stronger desire for wellbeing

WELLZoomers – 15.8 MILLION HOUSEHOLDS

There are 15.8 million WELLZoomer households in the US (representing 18 per cent of survey respondents). They're defined by their age cohort (25–34-year-olds) and attitudes about healthy living. WELLZoomers are the children of Boomers who possess an even stronger desire for healthier living and greater wellbeing. They are significantly more likely to:

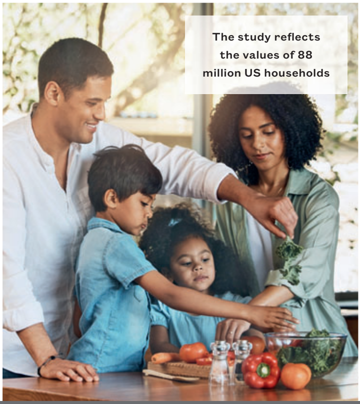
- Use wearables
- Use spa, alternative medical practices, and healing therapies
- Rent versus own a home
- Feel anxious
- Consume recreational marijuana and CBD products
- Be black or Hispanic
- Agree with the following statements:
  - ❖ I wish I could spend more time with my spouse/significant other
  - ❖ I measure my wellbeing by how hopeful, joyful and energised I feel
  - ❖ I am excited about what lies ahead
  - ❖ My work has meaning

FUTURE OPPORTUNITIES

As competition in the marketplace increases and the integration of data, technology and health science into experiential programmes and services continues, it will be imperative to have clear standards and agreed metrics to define and differentiate unique experiences and programme premiums. Further, providers will need a deeper understanding of the profiles and expectations of diverse market segments to remain relevant, identify new business opportunities and prosper.

Consumers' increased focus on the pursuit of healthier lifestyles, guided by the insights derived from personal information and big data, has created a remarkable opportunity for both revenue growth and brand distinction. Providers who evolve their products and services to reflect the preferences of emerging markets will be the most successful. ●

■ For more information on the *WELLSurvey*, contact Kevin Kelly at **kevin@civanoadvisors.com** or visit **https://civanoadvisors.com/wellsurvey/**



The study reflects the values of 88 million US households