

## THE USA HOT SPRINGS MARKET

- ▶ While there are a significant number of hot springs in the United States, overall awareness is low, as is category development.
- Primarily used by outdoor enthusiasts in more natural settings, benefits of hydrotherapy and mineral water are not widely known in the USA.
- ▶ Thus, consumer marketing for hot springs resorts in the US is focused largely on education.





#### THE USA WELLNESS CONSUMER

Beliefs and misunderstandings amongst wellness consumers

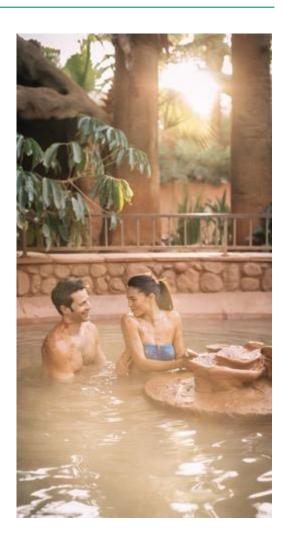
#### THE US WELLNESS CONSUMERS BELIEVES:

- ▶ Good health is directly related to diet, exercise, genetics, Western medicine
- Rapidly expanding views on the benefits of self-care:
  - Meditation
  - Yoga
  - Massage
  - Skin care
  - Time for self
  - Acupuncture/chiropractic
- Often substitutes beauty for wellness and consumption for emotional well-being:
  - Make-up and mani/pedis vs. skin care
  - ▶ Food, alcohol, shopping vs. meditation

# THE US WELLNESS CONSUMERS KNOWS THE FOLLOWING FEEL GOOD BUT MAY NOT UNDERSTAND WHY:

- Soaking/hydrotherapy mineral springs
- Saunas and steam rooms

Only the most sophisticated wellness clients use spas regularly and understand the benefits of treatments, hydrotherapy, self-care.





## THE POWER OF WELLNESS

- Although the benefits of hot springs are not widely known in the USA, wellness is one of the fastest growing leisure sectors in the nation.
- ▶ Thus, the health benefits of massage, skin care, yoga, meditation and other emerging categories can be leveraged to drive visitation to hot springs resorts.
- ▶ At Glen Ivy Hot Springs, we see approximately 200,000 guests a year and roughly 75% enjoy some spa treatment on their visit.
  - Massage
  - Facial
  - Nail Care
  - ▶ Grotto a subterranean moisturizing treatment
- ▶ Thus, packages and promotions always include a treatment and the business is focused on adding "cutting edge" treatments and education to the offering.
  - Shirodhara
  - Quartz
  - Spa.wave
  - Hydrafacial
  - Vegan cooking
  - Sound bath









# THE VALUES OF EXPERIENCE



By focusing on areas of wellness that the American consumer understands, we transfer the benefits of hot spring bathing via association.



This drives overall wellness visitation and allows the uninitiated "bather" to experience the benefits of the water personally.



Experiential education allows for some of our most impactful lessons as humans.



