

| <b>SPA AND WELLNESS SECTOR STRATEGY &amp; ACTION PLAN – Saint Lucia</b> |   |
|---|---|
| <b>Background</b>   |   |
| <b>General description</b>  | <p>Wellness focuses on the balance between medical treatment and an overall or holistic approach to mind and body. Wellness tourism has been defined as a journey towards greater self-awareness, enhanced health and well-being through a holistic approach towards body, mind and spirit. It integrates beauty, nutrition, relaxation and stress relief, fitness, healing, education, creativity, spirituality (meditation, yoga), and social responsibility into experiential and transformative travel experiences. Wellness services are often delivered through spas. In the global industry there is a distinction between Day Spas and Resort Spas which offer slightly different services/experiences.</p> <p>The tourism industry and its professional association the SLHTA is aware of the importance of spas/wellness to the Saint Lucian economy. Some seem eager to make Saint Lucia a “wellness island” but it is not clear if there is the political support to do so. Some tourism stakeholders argue that a lot of resources have been invested in branding the island as a honeymoon destination and this has paid dividends.</p> <p>But Saint Lucia has some of the best resort spas in the region and a sizeable number of well-trained local spa therapists. There is also spa training capacity and a well developed market for local and expatriate spa managers. The unique physical environment also lends itself to wellness tourism.</p>   |
| <b>Types of services</b>  | <p>The spas/wellness sector in St Lucia consists mainly of:</p> <ul style="list-style-type: none"> <li>• Large internationally run resorts (mainly all inclusive hotels) that include Sandals, Rex and Almond Resorts, which have full spa service facilities;</li> <li>• Small high-end niche resorts which have a special focus on health and wellness tourism such as LeSport/Body Holiday, Ladera, Landings and Anse Chastanet/Jade Mountain;</li> <li>• Day spas mainly in and around Castries and Rodney Bay, which cater to the local middle class, as well as long-term tourists, and expatriates that often reside in villa resort complexes.</li> </ul> <p><u>Spa &amp; Beauty Treatments:</u></p> <ul style="list-style-type: none"> <li>• Massage (Swedish, couples, sports, (volcanic) hot stone, prenatal, aromatherapy, Lomi Lomi, Thai, Shiatsu, baby Thai, therapeutic, deep tissue, spinal, rheumatism, body sculpting, mermaid/floating massage (on a water bed)(Examples of ‘indigenous massages’: The Body Holiday - bamboo massage; F.A.C.E. - Caribbean fusion massage - traditional West Indian massage using local herbs.)</li> <li>• Body Wraps/Scrubs (Examples of the use of indigenous products in treatments: Amais - aloe vera &amp; pear cactus, sugar cane, bamboo &amp; lemongrass, cocoa sugar; Cool Water - sea salt, coconut, marine seaweed/algae, moor mud; Health and Beauty Day Spa - ginger, lime; Marigot – sulphur mud, aloe, coconut milk, cocoa, sea salt, sugar cane; Sandals - sea salt, papaya-pineapple, sugar cane, coffee, lemon, seaweed, honey-ginger; The Body Holiday - ginger/lime, coconut milk, frangipani, dead sea mud, algae; Touch Therapies - papaya, aloe vera,</li> </ul> |

coconut, volcanic mud, sea salt, seaweed; Jade Mountain - chocolate; Boucan: cocoa, chocolate; Ladera - spices (ginger, nutmeg, orange & cinnamon), walnut, sea salt, sulphur mud)

- Facials (Marigot: banana, pawpaw, cucumber & avocado mix)
- Manicures/Pedicures
- Epilation
- Makeup: lash, brow
- Hair dos – including hair braiding
- Reflexology
- Sauna (steam and dry (infra-red))
- Lymphatic drainage
- Acupuncture; Qi Gong; Reiki; Cupping; Su Jok; Chi Nei Tsang; Cranio-Sacral; Flotation tank; Sauna dome; Ear candling
- Traditional Chinese Medicine
- Ayurveda (Abhyanga massage, Mukhralepa facial, Shiro Dhara (warm oil treatment), Udvartana (detoxification) Hasthabhyanga (Hand) or Padabhyanga (Foot))
- Microdermabrasion
- Non-surgical lifts
- Moroccan Rasul (a computerized treatment room where, at the touch of a button, one can select various muds and clays for personalised body treatments)

Education:

- Baby massage classes
- Holistic therapy school
- Retreats/Workshops: Transcendental meditation; Pranayama breathing; Lymphatic brushing classes
- Life Coaching

Wellness Inspired Sports:

- Rainforest power walking
- Yoga
- Pilates
- Aqua aerobics
- Tai Chi
- Personal training

Other:

- Medical Spa – offers a wide range of services not necessarily noted above (fillers, botox, lasers, microdermabrasion, medical weight loss, chemical peels, medical facials, etc.)
- Spa parties
- Hypnotherapy

|  |   |
|--|---|
|  | <ul style="list-style-type: none"> <li>Organic products (Eden Herbs, Natmed)</li> </ul> <p>240 massage therapists have been registered by the Allied Health Council. Only 16 of the registered 240 practitioners were male. According to the Allied Health Council website, registration has expired for 193 of the practitioners or 80%.</p> <p>There are 5 registered acupuncturists, 7 dieticians, 2 herbalists, 2 homeopaths, 5 naturopaths and 4 reflexologists.</p> <p>Based on desk research, there are at least 30 resort spas, 15 day spas, 3 training institutions, and 2 medi-spas.</p>  |
| <p><b>Size of sector, trends, growth (global/regional)</b></p> | <p>SRI International's new report on the US\$439 billion wellness and spa tourism market reveals that that while today the U.S. and Europe heavily dominate for both inbound and outbound wellness tourism, that is going to change dramatically. Fifty-percent of global wellness tourism growth through 2017 will come from Asia, Latin-America and the Middle East/ North Africa. According to a survey by <i>Travel to Wellness</i> magazine and Well-Being Travel, the 10 top Worldwide Wellness Destinations for 2015 in order of votes received were Bali, Hawaii, Costa Rica, Italy, Arizona, New Zealand, California, Thailand, India and Australia. But interestingly, destinations that received more than one vote were Spain, Greece, Iceland, Saint Lucia and Florida.</p> <p>The estimated Caribbean potential in terms of export earnings from this sector is US\$175 million. The World Health Organization predicted that 'health' travel will be one of the world's largest industries by 2022.</p> <p>The main drivers of wellness tourism include: increased stress in modern work environments; growing health concerns and 'green' living; better health care education; growing obesity crisis in the US and UK; natural / organic craze; increasing numbers of affluent professionals; wellness marketing (hotels, products, services, foods)</p> <p>The main Industry trends include:</p> <ul style="list-style-type: none"> <li>Marketing shift from organic to natural</li> <li>Increasing appreciation of the value of spa treatments globally</li> <li>Influence of Asian products and treatments <ul style="list-style-type: none"> <li>Medi-spas – laser, Botox, acupuncture</li> <li>Preventative health treatments – nutrition, fitness, health education</li> <li>Local and indigenous products and experiences</li> <li>'Green' spas</li> <li>Couples spa vacations</li> </ul> </li> </ul> <p>The Global Spa and Wellness Report 2014 indicated that the global spa industry was valued at US \$94 billion in 2013 and between 2007 and 2013 the number of spas increased by 47%. In Latin America and the Caribbean spa revenues have grown by 86% since 2007. In 2013, international wellness tourists spent approximately 59 percent more per trip than the average international tourist. The spa industry in the Caribbean is valued at US \$180 million according to a report by the OAS Secretariat.</p> |

|   |  |
|---|--|
|   | <p>Caribbean Export in collaboration with the Caribbean Spa and Wellness Association has developed a strategy for the sector: Caribbean Spa and Wellness Sector Strategy: 2014-2018. Caribbean Export is also developing “A Practical Guide to Incorporating Cultural Aspects into Spa Services” which will assist in distinguishing national and regional offerings from competition.</p>   |
| <p><b>Potential economic impact for Saint Lucia</b></p> | <p>The spa and wellness sector in Saint Lucia is wide. It comprises world class spas, solo massage therapists and many permutations in between. The offerings are just as rich – an almost endless list. Many of the spas offer Caribbean-centric services and use indigenous products. There are 240 registered practitioners in the sector. Many of the spas also have world-class websites.</p> <p>In addition, Saint Lucia is peaceful, idyllic and scenic and well suited for the development of this sector – i.e. hot springs, mud baths, waterfalls, mineral baths, hiking trails, beaches.</p> <p>The government also supports the development of this sector. ‘Spa management’ was deemed one of the approved areas for national training in 2013-2014. Spa development is also an area in which the government offers investor incentives.</p> <p>With over 30 resorts spas and 15-day spas the sector’s economic impact is strong, both as a distinct sector and with regards to the value it provides to the tourism sector. The spa and wellness sector also contributes significantly to employment, however mainly women are employed in this sector.</p> <p>Saint Lucia’s spa offering in comparison to the rest of the Caribbean is particularly well developed. However, Saint Lucia and the Caribbean are not really considered spa and wellness destinations. The marketing thrust nationally and regionally can be much stronger. Saint Lucia is renowned as a honeymoon island and has received awards in that category over the years.</p> |
| <p><b>Gender issues</b></p>                             | <p>Stakeholders observe that the majority of practitioners in this sector are women. Gym staff and fitness trainers present a more even profile in terms of sex than spa operators, who are mostly women. Clients of spas are mostly women, while those of gyms and fitness classes vary by establishment and the type of fitness regime on offer. Increasing numbers of men are interested in adopting healthy lifestyles, including a variety of fitness activities beyond the usual focus on sport, and personal grooming and relaxation services offered at spas.</p> <p>Resort spas are part of hotels and may be under hotel ownership or leased. The hotels exert varying levels of control over these operations and require varying levels of financial return. Resort spas tend to be larger entities than spa operations, which at the smallest extreme may comprise just one person offering services on an itinerant basis. An enterprise survey conducted in Saint Lucia in 2009 revealed that women were the majority of owners and employees of micro-enterprises; companies comprising fewer than five people. Most owners of companies with five or more employees are men. Thus in the spa and wellness sector, we can expect a very high percentage of day spa</p>   |

companies to be owned and run by women, while in resorts there may be comparatively more male involvement at the ownership and management levels, especially in the operations owned by the hotels themselves.

Reasons for the concentration of women in micro-enterprise are manifold, but a central issue is that of primary responsibility for care of dependents in a context of low male involvement in the practical tasks of parenting and low access to child care services. Women are therefore constrained in expanding their businesses by the practical difficulties of working enough hours and travelling when they have to look after their children or other relatives. These challenges may place a particular brake on the abilities of women to export their services through Modes 3 and 4. In part for these reasons, day spa services may serve more of a local clientele than resort services. With regard to flexible working, one of the attractions of small spa operations may be that they enable operators to schedule appointments according to their availability.

The Labour Code includes equal opportunities legislation protecting against sex (and other forms of) discrimination relating to application for and conditions of employment. It does not speak to flexible working arrangements or to the protection of employment for emergency or other care of employees' dependents. The definition of sexual harassment in the Labour Code relates to relations between employees and employers and does not cover other settings such as institutions (including health and wellness settings) and national borders where individuals exercise authority. These gaps impact especially on women and can hinder their effectiveness in delivering service products, generating income and in international trade.

**Main players in the sector**

**Resort Spas:**

|                                  |                    |  |
|----------------------------------|--------------------|--|
| Anse Chastanet                   | Kai Belte Spa      | <a href="http://www.ansechastanet.com/spa/spa.html">www.ansechastanet.com/spa/spa.html</a>   |
| Bay Gardens Resort and Spa       | La Mer Spa         | <a href="http://www.baygardensresorts.com/bay-gardens-beach-resort-spa/spa.htm">www.baygardensresorts.com/bay-gardens-beach-resort-spa/spa.htm</a> |
| Calabash Cove Resort and Spa     | Ti Spa             | <a href="http://calabashcove.com/new/spa">http://calabashcove.com/new/spa</a>  |
| Cap Maison Resort and Spa        |                    | <a href="http://www.capmaison.com/content_manager/thingsToDoCategories/view/1">www.capmaison.com/content_manager/thingsToDoCategories/view/1</a>   |
| Capella                          | Auriga Spa         | <a href="http://www.capellahotels.com/saintlucia/spa/st-lucia-spas">www.capellahotels.com/saintlucia/spa/st-lucia-spas</a>                         |
| Coco Palm Resorts                | Coco Beauty Clinic | <a href="http://www.coco-resorts.com/spa.php">www.coco-resorts.com/spa.php</a>   |
| Coconut Bay Beach Resort and Spa | Kai Mer Spa        | <a href="http://cbayresort.com/spa">http://cbayresort.com/spa</a>  |
| Cotton Bay Village               | Casurina           | <a href="http://cottonbayvillage.com/spa">http://cottonbayvillage.com/spa</a>  |
| Fond Doux Plantation and Resort  | Mama La Terre Spa  | <a href="http://www.fonddouxestate.com/spa/mamma-la-terre-spa.htm">www.fonddouxestate.com/spa/mamma-la-terre-spa.htm</a>                           |
| Harlequin Blu                    | Alaia Spa          | <a href="http://www.harlequinblu.com/activities-facilities">www.harlequinblu.com/activities-facilities</a>   |
| Jade Mountain                    | Kai En Ciel Spa    | <a href="http://www.jademountain.com/wellness/spa.html">www.jademountain.com/wellness/spa.html</a>   |

|   |                               |  |
|---|-------------------------------|--|
| Ladera  | The Spa                       | <a href="http://www.ladera.com/spa">www.ladera.com/spa</a>   |
| Marigot Beach Club  | Soothing Touch Spa            | <a href="http://www.marigotbeachclub.com/health-retreat/health-spa.htm">www.marigotbeachclub.com/health-retreat/health-spa.htm</a>                                 |
| Ocean View Hotel and Spa  | Ocean View Spa                | <a href="http://www.oceanviewstlucia.com/spa.php">www.oceanviewstlucia.com/spa.php</a>   |
| Rabot Estate (Hotel Chocolat)   | Coco Juvenate Spa             | <a href="http://www.hotelchocolat.com/uk/boucan/the-experiences/cocoa-juvenate-spa">www.hotelchocolat.com/uk/boucan/the-experiences/cocoa-juvenate-spa</a>         |
| Rendezvous Resort   | Spa in the Water Garden       | <a href="http://www.theromanticholiday.com/wellness/spa">www.theromanticholiday.com/wellness/spa</a>   |
| Royal by Rex Resorts  |                               | <a href="http://www.rexresorts.com/st-lucia/resort-st-lucia-royal-by-rex-resorts.html">www.rexresorts.com/st-lucia/resort-st-lucia-royal-by-rex-resorts.html</a>   |
| Royalton St. Lucia Resort and Spa   |                               |  |
| Sandals Grande  | Red Lane Spa                  | <a href="http://www.sandals.com/RedLane/redlane-caribbean-spa/">www.sandals.com/RedLane/redlane-caribbean-spa/</a>   |
| Sandals Halcyon Beach   | Red Lane Spa                  | <a href="http://www.sandals.com/main/halcyon/ha-spa/">www.sandals.com/main/halcyon/ha-spa/</a>   |
| Sandals Regency La Toc  | Red Lane Spa                  | <a href="http://www.sandals.com/main/lucia/lu-spa/">www.sandals.com/main/lucia/lu-spa/</a>   |
| St. James Club  | Tranquility Body and Soul Spa | <a href="http://www.morganbayresort.com/spa.html">www.morganbayresort.com/spa.html</a>   |
| St. Lucian by Rex Resorts   |                               |  |
| Stonefield Estate Resort  | Amais Spa                     | <a href="http://www.stonefieldresort.com/spa">www.stonefieldresort.com/spa</a>   |
| Sugar Beach   | Rainforest Spa                | <a href="http://www.viceroyhotelsandresorts.com/en/sugarbeach/spa_and_wellness">www.viceroyhotelsandresorts.com/en/sugarbeach/spa_and_wellness</a>                 |
| The Body Holiday  |                               | <a href="http://www.thebodyholiday.com">www.thebodyholiday.com</a>   |
| The Landings  | Soleil Spa                    | <a href="http://www.landingsstlucia.com/spa/the-landings-spa.htm">www.landingsstlucia.com/spa/the-landings-spa.htm</a>   |
| The Village Inn and Spa   | Sea Shells Spa                | <a href="http://www.eliteislandresorts.com/st-lucia/village-inn/spa.html">www.eliteislandresorts.com/st-lucia/village-inn/spa.html</a>                             |
| Ti Kaye Resort and Spa  | Kai Koko Spa                  | <a href="http://www.tikaye.com/spa">www.tikaye.com/spa</a>   |
| WindJammer Landing  | The Spa at WindJammer Landing | <a href="http://www.windjammer-landing.com/uncategorised/the-spa-at-windjammer-landing">www.windjammer-landing.com/uncategorised/the-spa-at-windjammer-landing</a> |
| <p><b>Day Spas:</b><br/> Cool Water – <a href="http://www.coolwaterdayspa.com">www.coolwaterdayspa.com</a><br/> Escape Ste Lisi - <a href="http://www.thtssl.com/spa/features.html">www.thtssl.com/spa/features.html</a> (trainers - The Holistic Therapy School of Saint Lucia)<br/> Derm Med Clinic - <a href="https://www.facebook.com/derm-med">www.facebook.com/derm-med</a><br/> F.A.C.E to Face Day Spa – <a href="http://www.dayspasaintlucia.com">www.dayspasaintlucia.com</a><br/> Glitter Nails and Spa<br/> Healing Mini Spa<br/> Health and Beauty Day Spa – <a href="http://www.stluciadayspa.com">www.stluciadayspa.com</a> (trainers)<br/> Purity Day Spa<br/> The Wellness and Rejuvenating Farm<br/> Soul to Sole<br/> Touch Therapies Day Spa – <a href="http://www.touchtherapiesspastlucia.com">www.touchtherapiesspastlucia.com</a></p> |                               |  |

|  |                   |  |
|--|-------------------|--|
|  |                   | <p>Feng Shui Day Spa - <a href="http://stluciafengshuidayspa.com">http://stluciafengshuidayspa.com</a><br/> Caribbean Styles Hair and Nail Spa<br/> The Wellness and Rejuvenating Farm<br/> Tranquil Escape Spa - <a href="http://www.tranquilstlucia.com/mississauga-massage-services/index.html">www.tranquilstlucia.com/mississauga-massage-services/index.html</a></p> <p><b>Other:</b><br/> Natmed – Naturopathic Medicine<br/> Dermalogics Medical Spa - <a href="http://dermalogicsmedicalspa.com">http://dermalogicsmedicalspa.com</a></p>   |
| <b>Associations and Intermediary Organizations</b> |                   | <p>Hair, Beauty and Spa Association (Saint Lucia)<br/> Saint Lucia Coalition of Service Industries – <a href="http://www.slcsi.org.lc">www.slcsi.org.lc</a><br/> Caribbean Spa and Wellness Association – <a href="http://www.caribbeanspawellness.com">www.caribbeanspawellness.com</a> (11 Saint Lucian spas noted as members)<br/> Allied Health Council – <a href="http://www.alliedhealthcouncilslu.org">www.alliedhealthcouncilslu.org</a></p>   |
| <b>Internal to Saint Lucia</b>                     | <b>Strengths</b>  | <ol style="list-style-type: none"> <li>1. Established tourism sector</li> <li>2. Established standard governing beauty and wellness facilities in Saint Lucia - SLCP 13:2012 (5 certified day spas)</li> <li>3. Level 3 Caribbean Vocational Qualifications (CVQ) programme for 25 practitioners per year [???</li> <li>4. 240 practitioners registered with Allied Health Council</li> <li>5. Wide range of wellness services including: massage, medi-spa, Aryurvedic, reflexology, Reiki, homeopathic, naturopathic, etc.</li> <li>6. Wide range in spa facilities from 5 star resort spas, to day-spas, to home-spa services</li> <li>7. High number of spas and related facilities available</li> <li>8. Increasing use of spa services by tourists and locals</li> <li>9. Natural environment conducive to sector growth</li> <li>10. Cultural practices with potential for development (Caribbean health and healing practices)</li> <li>11. Government support for sector development – albeit, no mention of the sector in the 2015 budget</li> <li>12. Strong incorporation of indigenous plants, coconut oil, etc.</li> <li>13. Some indigenous massage available (bamboo massage, lava stone)</li> </ol> |
|  | <b>Weaknesses</b> | <ol style="list-style-type: none"> <li>1. Little sector collaboration (weak associations)</li> <li>2. Little cross-sector collaboration (e.g. massage therapists – physical trainers – gyms – hotels without spa facilities)</li> <li>3. No incentives outside of hotels/resorts</li> <li>4. Limited business development skills (marketing, management, product development)</li> <li>5. Limited marketing at spa level &amp; limited marketing at national level of Saint Lucia as a spa and wellness destination</li> <li>6. Limited perception of a uniquely Caribbean/St. Lucian offering and limited national understanding about the value of the sector</li> <li>7. Standards are in place, but there is concern about monitoring spas and practitioners. Spa standards are</li> </ol>   |

|                                |   |   |   |
|--------------------------------|---|---|---|
|                                |   | <p>voluntary</p> <p>8. Poor access to finance; very small size of some spas prevents operators from seizing opportunities to expend their business and export their services.</p>   |   |
| <b>External to Saint Lucia</b> | <b>Opportunities</b>  | <ul style="list-style-type: none"> <li>• Projected tremendous growth in sector. Increasing interest in wellness by tourists, including men. Nationals living in other countries (the diaspora) may be especially interested in purchasing local products abroad or returning to Saint Lucia to experience "wellness packages." There may also be opportunities to differentiate product offerings for men and women.</li> <li>• Enhanced regional efforts to develop the sector and market and brand the Caribbean as a wellness destination</li> <li>• Potential to develop related products, incorporate national/regional healing practices</li> </ul> |   |
|                                | <b>Threats</b>  | <ul style="list-style-type: none"> <li>• Competition from many different countries and regions, especially Western Europe, South East Asia and USA</li> <li>• Subject to the seasonal nature as well as the unpredictable cycles of the tourism industry in the region and globally</li> </ul>  |   |
| <b>Demand</b>                  |   |   |   |
| Potential Markets:             | <b>Characteristics of Potential Clients &amp; Mode of Supply:</b>   | <b>Why interested:</b>  | <b>Competitors:</b>   |
| Saint Lucia                    | Potential for growth particularly with respect to day-spas as awareness with respect to the benefits of wellness services and trends such as weight-loss, stress relief and anti-aging continue to grow. There may be variation in the social profile of customers. Some spas offer massages alongside nail, hair and other beauty services and may cater to a more varied clientele in terms of income than the spas that focus on alternative therapies that tend to cater to higher income groups, with greater percentages of men using the latter. Day spas may attract more women and locals than the resort spas where more of the clients are tourists. | Easy to undertake. Awareness building and marketing can be driven through collaborative efforts and strong social media campaigns.  | Little to none. The cost of regional wellness tourism is a deterrent. Those with more access to disposable income may seek staycation resort spa experiences. |
| Caribbean                      | Regional business persons and those travelling to Saint Lucia for other purposes (i.e. Saint Lucia Jazz Festival)   | Saint Lucia is a hub for regional business travel and conference-type events. Often professionals   | Day spas should consider partnering with hotels to offer 'package deals' (room+spa discounts+transportation to  |



|   |  |   |   |
|---|--|---|---|
|   | are a good group to target. This market is particularly relevant to centrally located day spas.  | have disposable income. Often professionals are 'stressed'. Business travelers typically do not stay at resorts.  | day spa). Consider also express services/in-room services for hotels with no spas.  |
| Canada & USA  | Canada, USA and the EU have been identified as the main source markets for spa and wellness tourism. These visitors appreciate the value of spa and wellness services, have bought into many of the related trends, and have disposable income. This market is relevant namely to resort spas.   | <p>Visitors are seeking more than sun, sand and sea. Spa and wellness services add value to vacations and help visitors meet their objective of 'relaxation'.</p> <p>The Saint Lucia environment is conducive to the demand / consumption of spa and wellness services.</p> | <p>Saint Lucia is not generally being chosen as a vacation destination because of their spa and wellness offerings. Rather spa and wellness services add value to the sun, sand and sea offering being sought.</p> <p>The Body Holiday is a Saint Lucian resort focused primarily on spa and wellness offerings and may be an exception to the above statement.</p> <p>Spa and wellness competitors include: Thailand, Germany, France and the USA.</p> <p>Malaysia, Japan, Australia, Indonesia, China, India, UAE and the Maldives are also investing heavily in the sector.</p> <p>Saint Lucia must develop and market a reputation as a spa and wellness destination thereby attracting a different/larger segment of potential visitors.</p> |
| United Kingdom  | As per above.  | As per above.   | As per above.   |
| Europe  | As per above.  | As per above.   | As per above.   |
| Latin America   | Beyond business visitors and those visiting Saint Lucia otherwise, there is not much interest.   | Not much interest.  | As per above.   |
| <b>Saint Lucia's competitive advantage or unique selling point?</b> | Saint Lucia has a large number of spas offering a wide range of services – including world-class spas such as Sandals and The Body Holiday. There are a large number of registered practitioners in the sector. The natural beauty/resources of the island is a strong marketing feature, with respect to Saint Lucia acting as a spa and wellness |   |   |

|                                   |   |  |
|-----------------------------------|---|--|
|                                   | destination.  |  |
| <b>Cost comparison</b>            | The offerings are wide, making it difficult to make a general statement with respect to cost. In terms of comparable services – i.e. day spas in Saint Lucia versus day spas in the US, or 5 star resort spas in Saint Lucia versus 5 star resort spas in the US, Saint Lucia is competitively priced.  |  |
| <b>Marketing and Promotion</b>    | <b>Current Context</b>  | <b>Other Considerations</b>  |
| <b>Existing channels</b>          | <p>The Saint Lucia Tourist Board has a website and is active on the following social media platforms: Facebook (active – 60k Likes), Twitter (active – 6400 followers approx.), YouTube (258 subscribers), Pinterest (2340 followers approx. - which features a 'Health and Wellness' board). Instagram (active - 2,560 followers approx.) and Google+ (active – 123 followers).</p> <p>However, information specifically related to the health and wellness sector is sparse. For example, the website of the Saint Lucia Tourist Board features only 2 web pages (1 involving hotel packages) and a mere 165-word description of the sector. The Pinterest board features only 15 images.</p> <p>Promotional efforts also take place by overseas mission. There is a Saint Lucia UK website as well as a Saint Lucia UK Facebook page (active – 9,700 Likes), Twitter account (active - 2527 followers) and YouTube channel (active - 38 subscribers).</p> <p>All resorts have a website. It was noted that often information on the resort's spa was difficult to find on the site (i.e. not on the home page). Quality of the websites and the information on the spa and wellness offerings varied significantly from resort to resort (and day spa to day spa).</p> | <p>Marketing efforts of Saint Lucia does not effectively position the island as a spa and wellness destination, though there is definitely scope for this.</p> <p>The government, Tourist Board and spa and wellness operators should work together to define a spa and wellness identity and marketing strategy for Saint Lucia.</p> <p>This sector is well-developed already, therefore capitalizing on this sector will not require substantial financial resources. A strong and cohesive marketing strategy is a good first step.</p> |
| <b>New channels</b>               | Social media are being utilized by the resorts.   |  |
| <b>Branding &amp; Advertising</b> | <p>Branding and advertising is being undertaken primarily on a resort-by- resort basis or day spa-by-day spa basis. There is significant scope for creating a national spa and wellness identity through joint messaging, a spa and wellness web/social media presence, strategic targeting to tour operators in the target markets – Canada, US, EU and participation in international events in this sector.</p> <p>November has been deemed 'health and wellness month' in Saint Lucia.</p>  | <p>Although it has worked well to date, the current marketing of Saint Lucia as a honeymoon destination is somewhat limited and restricted in its orientation and vision. The island has various natural physical attributes due to its topography and geography which make it a special place. Its landscape</p>  |

|  |   |   |
|--|---|---|
|  | <p>During this month special rates/packages are offered at resorts with spas. Incentives have also been offered to travel agents during 'health and wellness month' - <a href="http://stlucianow.com/press/2013/06/saint-lucia-offers-travel-agents-added-incentives-for-health-and-wellness-month">http://stlucianow.com/press/2013/06/saint-lucia-offers-travel-agents-added-incentives-for-health-and-wellness-month</a>.</p> <p>Many international experts lead health and wellness activities during health and wellness month.</p>  | <p>is very varied and sometimes stunning. It contains waterfalls, mountains, lush valleys, semi-montane environments and a wide variety of coastal environments and beaches. It could be positioned in the global health/wellness marketplace as a place for outdoor activities and healthy lifestyles. It should be branded as a health/wellness-promoting island.</p> |
| <b>Collateral marketing material</b>             | <p>Saint Lucia also produces visitor guides. For example, Saint Lucia: the Experience is available in print and as an e-book. The e-book however, makes almost no reference to the spa and wellness sector.</p>   |   |
| <b>Coordinated Strategic Plan (Stakeholders)</b> | <p>There is no coordinated national policy instrument or plan focused on the spa or wellness sector. There is however a regional plan in place, from which Saint Lucia is likely to accrue some benefits – e.g. Saint Lucian spas will participate in the efforts: Incorporating Caribbean Cultural Assets into Spa Services and the provision of technical assistance to spas to support the adoption and compliance with regional voluntary spa industry standards.</p>   |   |
| <b>Investment incentives</b>                     | <p>Incentives are available under the Tourism Incentive Act, however, it has been noted that these are difficult to obtain. Day spa and gym operators would like easier access to duty-free equipment.</p>  |   |
| <b>Standards and quality</b>                     | <p>The Saint Lucia Code of Practice for Beauty and Wellness SLCP 13:2012 establishes the minimum requirements for the provision of quality services by beauty and wellness practitioners. Five day spas in Saint Lucia have been certified: Escape Ste Lisi Day Spa, Cool Water Day Spa, Saint Lucia Health and Beauty Co. Ltd., Touch Therapies Day Spa and Spa Da La Mer. This is a voluntary standard.</p> <p>A regional (voluntary) spa standard is also being introduced via the Caribbean Spa and Wellness Strategy funded by Caribbean Export.</p> <p>The Allied Health Council of Saint Lucia (AHCSL) is a statutory health body established in terms of the Health Practitioners Act 2006 in order to control all allied health professions including: massage therapists, acupuncturists, dieticians, herbalists, homeopaths, naturopaths and reflexologists.</p> |   |

|  |   |  |
|--|---|--|
|  | The HPA Act 2006 Section 88, states that a person shall not practice as an allied health practitioner in any allied health profession or hold himself or herself out to be an allied health practitioner unless the person is registered as such and there are significant fines if this is contravened.  |  |
| <b>Innovative marketing</b>                              | While the internet is being well utilized and maintained in the health and wellness sector, it tends to be a static presence (i.e. static spa pages from resorts). A much more aggressive and dynamic strategy is required. It must be reiterated that Saint Lucia is competing internationally and accordingly its marketing efforts must stand out at an international level.   | Marketing should be driven via a comprehensive communications strategy. This process should involve ideally all stakeholders in the sector to some extent. |
| <b>International outreach strategy</b>                   | There is a need to market on well-known international platforms, form global strategic alliances, participate in international trade shows, explore spa-related product development, maximize on the use of social media and actively seek to grow fan base.<br><br>For example – 8 spas in Saint Lucia are listed under SpaFinder, 10 under Luxury Link, 2 spas are members of the International Spa Association.  |  |
| <b>Regional collaboration</b>                            | The spa and wellness sector is a priority sector across the region. Regional collaboration takes place via the Caribbean Spa and Wellness Association and Caribbean Export, as well as via the Caribbean Spa and Wellness Strategy.<br><br>There is scope for the development of regional spa and wellness packages.  |  |
| <b>Linkages with other clusters of economic activity</b> | There are clear linkages between the spa and wellness sector and the tourism sector which are well developed.<br><br>Less clear are the sectors linkages with the health sector. There is no real collaboration between the two sectors. As a general statement, the health sector does not recognize or appreciate the therapeutic value of the spa/wellness sector. The spa and wellness sector is well positioned to support medical tourism, and to provide therapeutic services to the medical sector. Business could be increased if the two sectors mutually enforced and promoted their distinct roles. |  |
|  | <b>Action to be Taken</b>   | <b>Other Issues to be addressed</b>  |
| <b>Policy barriers</b>                                   | There are no excessive policy barriers. There are standards in place for practitioners (mandatory) (Health Practitioners Act 2006 and for spas (voluntary).   | It would be helpful in developing a regional industry if the Caribbean Vocational Qualification (CVQ)  |

|   |   |  |
|---|---|--|
|   |   | standard became the minimum standard (Certification in Massage Therapy – Level 3). SLCSI should continue its efforts in assisting massage therapists to obtain this qualification.   |
| <b>Administrative barriers</b>                  | Duties and charges on equipment and products are too high and act as a constraint on investment in the sector.  |  |
| <b>Business environment</b>                     | Saint Lucia enjoys a fairly relaxed business environment, in which no real restrictions on business exist   |  |
| <b>Regulatory environment</b>                   | There are standards in place for practitioners (mandatory) and for spas (voluntary). But monitoring of quality control in some spas is limited.   |  |
| <b>Human Resources &amp; Standards</b>          | 240 massage therapists have been registered by the Allied Health Council. According to their website, registration has expired for 193 of these practitioners.<br><br>There are at least 3 training institutions in Saint Lucia.  | The Allied Health Council should ensure that registration/their website is kept up to date, in order to better inform the public.  |
| <b>Financing</b>                                | Access to financing remains difficult across all sectors. It is likely that large resort spas, however, will not face the same challenges as small day-spa operators.   |  |
| <b>ACTION PLAN FOR BUSINESSES/PROFESSIONALS</b> |   |  |
|   | <b>Action to be Taken</b>   | <b>Relevant Entities</b>   |
| <b>Preparing Business for Export</b>            | Saint Lucia is well positioned to better capitalize on the spa and wellness sector. <ul style="list-style-type: none"> <li>• A significant number of spas both resort and day;</li> <li>• A wide range of service offerings;</li> <li>• A large number of practitioners;</li> <li>• Standards in place;</li> <li>• Nature and natural beauty, good climate/weather;</li> <li>• Strong cultural heritage;</li> <li>• A strong and vibrant tourism industry;</li> <li>• World class operators/players;</li> </ul> | There is an opportunity to collaborate with SLCSI's export training programme for services providers. TEPA & SLCSI sh<br><br>Export coaching and marketing assistance is another area in which technical assistance can be sought.<br><br>OECS–CBU might be able to identify |

|                                    |   |  |
|------------------------------------|---|--|
|                                    | <ul style="list-style-type: none"> <li>• Good use of natural products in treatments;</li> <li>• Some manufacturing of spa products (Natmed);</li> </ul> <p>The main challenges are that the spa and wellness sector has not been identified as a priority sector and accordingly the marketing and branding of the sector – both re Saint Lucia as a spa and wellness destination and with respect to target marketing – is weak. The spa and wellness sector has not been identified as a priority sector for the Saint Lucia Trade and Export Promotion Agency - but the development of agriculture-based alternative medicines and body products is flagged.</p> <p>Saint Lucia must define this sector with its own identity, distinct from the identity of other spa and wellness destinations.</p> <p>There is scope to develop offerings further – using finished products made from local resources, incorporating traditional healing practices, incorporating services for families</p> | resources.   |
| <b>Market Research</b>             | Desk-based research identifying tourism operators working in the area of spa and wellness, as well as international web-based platforms and events from which to market their services will also assist spa operators.  | Collaboration among SLCSI, Caribbean Export, TEPA and spas in Saint Lucia and the Hair, Beauty and Spa Association.  |
| <b>International Business Plan</b> | Spa and wellness practitioners must actively consider how to attract additional tourists (and nationals) to their spas.   | Support can be sought from SLCSI and TEPA to this end. The OECS-CBU should also be interested in this.   |
| <b>Market Entry Strategies</b>     | <p>Supply through “Consumption abroad” (Mode 2) is the primary focus in this sector. There is potential to develop associated products such as massage oils for export.</p> <p>Consideration should be made on how to attract tourists from the main target markets for this sector – EU, USA and Canada.</p> <p>Participation in trade shows and marketing services to tourism operators in this area will be useful.</p> <p>The most impact however, will occur at the national level – Saint Lucia defining itself as a spa and wellness destination.</p> <p>More efforts can also be undertaken to raise awareness at a national level. This can be undertaken via the Hair Beauty and Spa Association (which</p>   | It is important not to focus solely on the export market so that the smaller, locally-oriented businesses also receive adequate access to finance and other supportive initiatives such as child care and legislation for flexible working arrangements. |

|  |  |   |
|--|--|---|
|  | needs to be revitalized and strengthened). The increasing interest among men in personal grooming and wellness offers the potential for increased involvement of men as suppliers and consumers of services.   |   |
| <b>Best Practices/Success Stories</b>                          | <p>There are many world-class spas in Saint Lucia – The Body Holiday, Jade Mountain, Ladera, The Landings, Sugar Beach, WindJammer. However, it is not possible for all spas to emulate these world-class resorts as they lack the infrastructure. There are many resort spas and even day spas that 1) have a world-class web presence; 2) have high standard spa facilities and well qualified practitioners; 3) incorporate Saint Lucian ingredients into their treatments (e.g. www.touchtherapiesspastlucia.com).</p> <p>Few local spas seem to be utilizing social media effectively.</p> <p>There are some resorts offering spa holidays rather than holidays ‘with a side-of-spa’. The Body Holiday is a good example.</p> |   |
| <b>Tasks for associations</b>                                  | The Hair, Beauty and Spa Association should be strengthened and provided with some resources to address key constraints in the sector. This association should incorporate resort spas as well and focus on advocacy, strengthening standards, branding and marketing and raising awareness. The association can also be used as a platform to share best practices.   |   |
| <b>B2B cooperation</b>   | There is scope for B2B alliances with the health sector and with hotels that do not have an on-site spa.   | TEPA, Hair, Beauty and Spa Association  |
| <b>ACTION PLAN FOR BUSINESSES SUPPORT ORGANIZATIONS (BSOs)</b> |  |   |
|  | <b>Action to be Taken</b>  | <b>Relevant Entities</b>  |
| <b>Advocacy</b>  | BSOs can assist in capturing information regarding the contribution of spas. There is limited awareness re the potential of the sector as there is little data available with respect to its contribution. Sex-disaggregated data should be produced in order to continually assess the roles of men and women in this area of economic activity.  | Ministry of Health, Ministry of Tourism, Hotel and Tourism Association (SLHTA), Ministry of Commerce, SLCSI, TEPA, Invest Saint Lucia           |
| <b>Training/Education</b>                                      | <p>Continue to provide training in technical areas (massage and related standards), spa best practices, and business best practices (e.g. marketing).</p> <p>Capture and undertake research on traditional healing methods, plants – for incorporation into spa services. Merge priority focuses – e.g. TEPA +</p>   | <p>SLCSI, TEPA, Ministry of Health, Ministry of Tourism, OECS-CBU</p> <p>This could be funded under a research program of UWI and a foreign</p> |

|  |   |   |
|--|---|---|
|  | Agriculture based alternative medicine and body products, Chocolate Heritage Month + chocolate/cocoa usage in spas.   | University. Possible link with a European University under <b>Horizon 2020</b> program for research and innovation? |
| <b>Promotion &amp; Communication</b>       | <p>Develop a website that highlights the spa and wellness sector. Assist in efforts of shaping a spa and wellness identity for Saint Lucia. Utilize contacts among Saint Lucian people living abroad (the diaspora) to promote local products.</p> <p>The spa and wellness sector should better feature in the country's marketing efforts.</p> <p><b>Timeframe – This should be completed by the end of 2016</b></p>   | Ministry of Tourism, Tourist Board, Hair, Beauty and Spa Professionals Association                                  |
| <b>Public-Private Partnerships</b>         | SLCSI has supported the establishment of the Hair, Beauty and Spa association. This association should be strengthened and expanded. Data on the gender profile of its membership should be gathered and used to guide strategies for gender equity.  | SLCSI, Ministry of Tourism, Ministry of Health  |
| <b>Best Practices/Success Stories</b>      |   |   |
| <b>ACTION PLAN FOR GOVERNMENT</b>          |   |   |
|  | <b>Action to be Taken</b>   | <b>Relevant Entities</b>  |
| <b>Strategic Plan</b>                      | <p>There is no strategic plan for the development of this sector. There is no Health and Wellness policy for this sector. This should be developed.</p> <p>More focus should be paid to investment in this sector, in addition to marketing/branding.</p> <p>General support for small and micro-enterprise in the form of financial and capacity-development opportunities is likely to pay dividends for the growth of the industry and sustainable livelihoods, especially for day spas and the (mostly) women and their families who depend heavily on this sector.</p> | Ministry of Tourism, Ministry of Health, Invest Saint Lucia   |
| <b>Market Access</b>                       | Market access is not a challenge. This sector relies heavily on tourists, which have wide and easy access to Saint Lucia. Some day spas depend more on local customers.   |   |
| <b>Business and Regulatory Environment</b> | Standards have been developed. These should be strengthened (e.g. mandatory standards for spas). The Ministry of Health should certify spas and wellness facilities in order to ensure standards in this tourism segment (like Thailand).   | Ministry of Health, Bureau of Standards<br>Resources may be sought from CSME Standby Facility.                      |



|                                   |   |  |
|-----------------------------------|---|--|
|                                   | Extend the definition of sexual harassment in the Labour Code to encompass harassment in settings beyond the traditional workplace such as institutions, and provide for protection of self-employed persons from sexual harassment as well.  | TradeCom li Program Management Unit???<br><br>Attorney General/Ministry of Legal Affairs |
| <b>Human resource development</b> | There are at least 3 training institutions in Saint Lucia. The Government should continue to encourage the adoption of CVQs in this sector, by offering training programmes. Business training should be offered alongside health and wellness promotion skills.<br><br>Vocational training courses should be developed (e.g. NVQs) that combine training in fitness and dietetics with wellness and spa skills and could thus attract more male candidates.<br><br>To support equal opportunities to participate in this sector, laws should be passed that supportive fathers gaining access to and caring for their children, workplace and other child care facilities should be expanded in the public and private sectors, and legislation should be developed to facilitate flexible working arrangements. | SLCSI, Private Sector, TEPA, SLCC  |
| <b>Finance &amp; Incentives</b>   | Inputs to this sector should be duty free. This process should be made relatively simple and transparent.<br><br>Provide incentives for investment in this sector or extend the concessions granted to resort spas to day spas as well.<br><br><b><u>Timeframe – 2nd quarter of 2017 under general incentives regime for service industries</u></b>   | Ministry of Finance<br><br>Ministry of Finance   |
| <b>Capacity-building of SMEs</b>  | Continue to support organizations like SLCSI and TEPA which offers export-related training to SMEs. Focus should be marketing and spa management as well as technical standards.  | SLCSI, TEPA, TVET  |
| <b>Promotion Initiatives</b>      | Collect information on the sector and register all businesses in order to maintain a network for data gathering, easy communication, promotion and marketing strategies.  | Ministry of Commerce, Tourist Board, Ministry of Health                                  |
| <b>Policy Coherence</b>           | Need to ensure that national business promotion policies, incentives, etc. are compatible and reinforce each other and help the spa/wellness sector   |  |

|   |  |  |
|---|--|--|
|   | <p>develop. There should be greater coordination among the various ministries and agencies that are responsible for health/wellness and tourism so that the tourism product can be broadened.</p>  |  |
| <p><b>Public-Private Partnerships</b></p> | <p>1. The branding of Saint Lucia as a tourism destination should be broadened to include a healthy outdoors-healthy lifestyle element or “wellness island” which can feed into other sectors such as agriculture (for locally grown, fresh foods and fruits), fitness, hiking, rappelling, mountain climbing, water sports, etc. But this requires a new vision and investment in some infrastructure; and of course, the collaboration of various ministries and agencies. It will also require some incentives to attract investment in relevant kinds of businesses to develop the outdoor activities and healthy outdoors-healthy lifestyle offerings. A change of branding and focus as suggested will significantly increase the catchment of possible visitors to Saint Lucia in the medium and long term. A wellness destination approach will also allow for developing medical tourism in the future.</p> <p>2. The GOSL should seek partners internationally to research the health or wellness benefits of the mineral waters, hot springs, volcanic sands and other natural resources in Saint Lucia.</p> <p>3, All stakeholders in Saint Lucia should play a very active role in regional initiatives to promote the Caribbean as a wellness destination and further develop the local spa and wellness industry.</p> | <p>Ministry of Tourism, Invest Saint Lucia, TEPA, SLHTA, Tourist Board, spa and wellness stakeholders.</p> <p>Approach UWI re possible American or European university that might be interested in this research project. USAID or EC funding?</p> |