

Market Research on Health Retreats

Contents

- 1. Introduction 3
- 2. Health Retreats in Australia 4
 - 2.1 Top 10 Health Retreats in Australia 5
- 3. Potential Market Size and Clients 5
 - 3.1 Population Aged 55 and Over, By Age and Sex, 2011 To 2041 7
 - 3.2 Population Age Comparison across Select Countries (2010 And 2015) 8
 - 3.3 The Changing Population Demography of Australia 9
 - 3.4 Older People with Disabilities in Australia, 2011 11
- 4. Alcoholics and Drug Addicts Statistics 11
 - 4.1 Gender Differences 12
 - 4.2 The Harmful Effects of Alcohol 12
 - 4.3 Illicit Drug Use 13
- 5. Consumer Needs and Wants 14
 - 5.1 Consumer Needs 15
 - 5.2 Consumer Wants 15
- 6. Social Media and Online Opportunities 16

1. Introduction

The Television Shows on Health Retreats aim to educate the target segment (esp. who suffers from poor health conditions) about the benefits of health retreats. The health retreats believe that true rejuvenation comes from a balance of awareness, action, activity and relaxation. They have positioned themselves as abodes of natural healing and permanent health benefits, promising to nourish both the body and mind of their patrons.

Australia, with its pristine environment and rich bio-diversity, is a land of natural beauty. Generally, the health retreats in Australia are found residing in the heart of nature - in the lush hinterland, natural bush or serene coastal settings. The clean environment, copious freedom, space, fresh air and sunshine will in themselves boost the spirits and freshen the minds of the visitors.

The multitude of wellness programmes encapsulate the mind, body, and soul and potential customers can choose the types of retreats according to the activities and outcomes that they are seeking for their health and wellness. These range from the more common nutritional and weight loss needs, physical exercise, stress management and meditation options to offering deeply transformative mental and emotional psychotherapeutic support.

One of the reasons health retreats are so successful is that in their hectic modern lifestyle, people do not have many opportunities to rejuvenate, relax and resolve the health issues that keep pile up in as a result of their busy lifestyles. Often they may be searching for ways to compensate for their stressful lifestyles, but may lack the alternative health knowledge and access to a full range of natural therapies and treatments. A holistic health retreat program will work on various aspects simultaneously, to improve their health. Whether they participate in a holistic detox retreat, juice fast, colon cleanse, safe and effective weight loss retreat, counselling, yoga, meditation or even a simple pamper treatment at a health retreat spa, they are bound to return home feeling more healthy and radiant

2. Health Retreats in Australia

The following figure shows the list of prominent health resorts in the major territories in Australia



2.1 Top 10 Health Retreats in Australia

¹The following figure depicts the list of the top ten health retreats located in Australia

TOP 10 HEALTH RETREATS IN AUSTRALIA

- Gwinganna Lifestyle Retreat
- Paperbark Camp
- The Golden Door Retreat Hunter Valley
- Seppeltsfield Vineyard Cottages
- Kangaroo island Wilderness Retreat
- Gaia Retreat Amp; Spa
- Authenticity Health & Wellness Retreat Port Elliot
- Collinora Health & Relaxation Retreat Warwick
- Chimes Retreat Denmark
- Annalilli Luxury Retreat Byron Bay

3. Potential Market Size and Clients

- The preliminary estimated resident population (ERP) of Australia at 30 June 2013 was 23,130,900 people. This reflects an increase of 407,000 people since 30 June 2012 and 95,700 people since 31 March 2013.²
- In 2011, 3.1 million people in Australia were aged 65 years and over. They accounted for about one in seven people (14%).³

¹ <http://top10australia.com.au/top10/top-10-health-retreats>

² <http://www.abs.gov.au/ausstats/abs@.nsf/mf/3101.0>

³ <http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/2071.0main+features602012-2013>

- The retired aged group is the main category of tourists who go for health and spa services followed by the professionals who are very health conscious and practice healthy lifestyle.
- The sample was composed of the 200 mature traveller respondents from health spring/spa destinations. It shows that 42.5% of respondents were aged between 50 and 54, only 27.5% were over 60 years old with a mean of 57.1.⁴
- Health Retreats and Spiritual retreats attracted the highest proportion of males (26%) and the highest proportion of residents aged 55 and over (38.2%).
- Baby boomers over 45 dominate the lifestyle resort and spiritual retreat, Health Retreat experiences (63.2% and 68.6% respectively).⁵
- Among adults, the people who affected by chronic diseases are also dominate the Health Retreats such as poor diet and nutrition, low physical activity, tobacco use, alcohol misuse, Drug misuse, high blood pressure, high blood cholesterol and excess weight.⁶
- South Australia and Tasmania had the largest proportions of older people (16%) with both men and women contributing to this effect. These were followed by New South Wales and Victoria (both 14%), Queensland (13%), Western Australia (12%) and the ACT, where 10% of the population was aged 65 years and over.
- The Northern Territory population was much younger, 6% being older people. Two of the factors contributing to this are the higher proportion of working age people (those aged 15–64 years) in Darwin than in other capital cities and a higher proportion of Aboriginal and Torres Strait Islander people, who have a younger age profile than the total population.⁷

⁴ <http://pc.parnu.ee/~htooman/Proceedingnyomdanak.pdf>

⁵ [http://www.crctourism.com.au/wms/upload/resources/WellnessTourism_Ind%20Summary%20WEB%20\(2\).pdf](http://www.crctourism.com.au/wms/upload/resources/WellnessTourism_Ind%20Summary%20WEB%20(2).pdf)

⁶ http://www.nuigalway.ie/health-promotion/documents/General_Staff_Publications/2007_rep_mckenna_obesity_report.pdf

⁷ <http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/2071.0main+features602012-2013>

- The Australian Bureau of Statistics (ABS) has reported marked increases in life expectancy. Projections show that the observed ageing of the Australian population is set to continue.⁸

The proportion of the population aged 65 years and over is projected to rise from around 12% today to 18% by the year 2021, to 25% by the year 2051. Record rates of increase in the population aged 65 years and over are likely between 2011 and 2021 as the peak of the baby-boom generation (post World War 2) reaches retirement age . During this period, the population aged 65 years and over is projected to grow from 3 to 5 million.⁹

3.1 Population Aged 55 and Over, By Age and Sex, 2011 To 2041

Age/Sex	2011 ^(a)	2021 ^(b)	2031 ^(b)	2041 ^(b)
Females				
55-64	1,311,000	1,530,000	1,638,000	1,783,000
65-74	857,400	1,255,000	1,475,000	1,582,000
75-84	550,700	739,000	1,093,000	1,294,000
85-94	245,500	302,000	430,000	643,000
95+	23,600	45,000	58,000	92,000
Total females 65+	<i>1,677,200</i>	<i>2,341,000</i>	<i>3,056,000</i>	<i>3,611,000</i>
Total females 55+	<i>2,988,300</i>	<i>3,871,000</i>	<i>4,693,000</i>	<i>5,393,000</i>
Total females	<i>11,359,800</i>	<i>12,851,000</i>	<i>14,436,000</i>	<i>15,842,000</i>
Males				
55-64	1,286,300	1,480,000	1,593,000	1,767,000
65-74	826,400	1,193,000	1,389,000	1,502,000
75-84	453,600	647,000	953,000	1,129,000
85-94	138,500	197,000	307,000	466,000

⁸ <http://www.healthinfonet.ecu.edu.au/population-groups/older-people/reviews/our-review>

⁹ <http://www.healthinfonet.ecu.edu.au/population-groups/older-people/reviews/our-review>

95+	790	18,000	28,000	51,000
Total males 65+	1,426,400	2,055,000	2,676,000	3,148,000
Total males 55+	2,712,600	3,535,000	4,269,000	4,916,000
Total males	1,126,700	12,765,000	14,351,000	15,768,000
Persons				
55-64	2,597,400	3,010,000	3,231,000	3,550,000
65-74	1,683,800	2,448,000	2,863,000	3,084,000
75-84	1,004,300	1,386,000	2,046,000	2,422,000
85-94	383,900	499,000	737,000	1,110,000
95+	31,500	62,000	85,000	143,000
Total persons 65+	3,103,500	4,395,000	5,732,000	6,759,000
Total persons 55+	5,700,900	7,405,000	8,963,000	10,309,000
Total persons	22,620,600	25,617,000	28,786,000	31,609,000

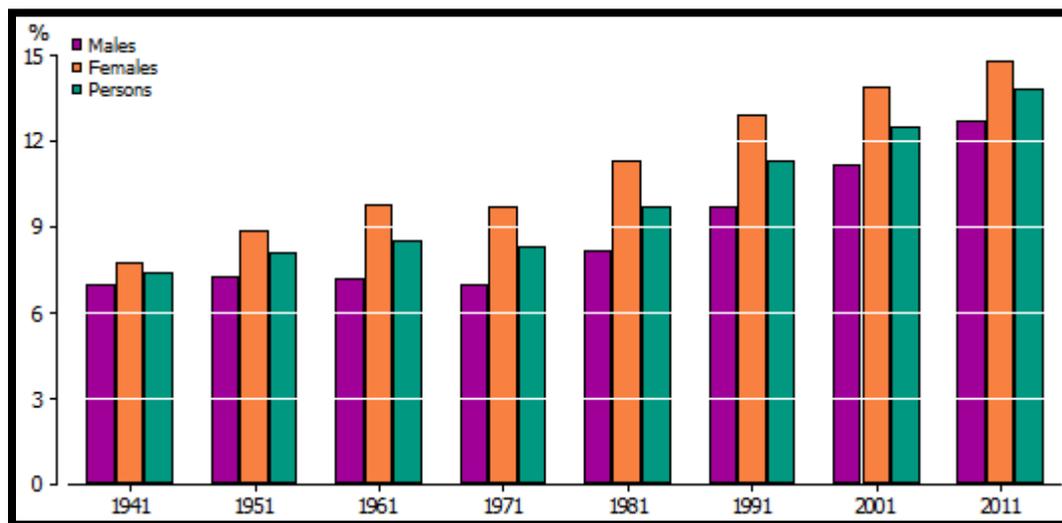
3.2 Population Age Comparison across Select Countries (2010 And 2015)

	2010		2015 ^(b)		2010 - 2015	
Country	Aged 65+	Median age	Aged 65+	Median age	Total fertility rate	Life expectancy at birth
	Per cent	Years	Per cent	Years	Rate	Years
Canada	14.1	39.9	16.0	40.9	1.6	81.4
Australia	13.6	36.9	16.4	39.9	1.9	82.0
United States of America	13.0	36.6	14.3	37.2	2.0	79.9

3.3 The Changing Population Demography of Australia¹⁰

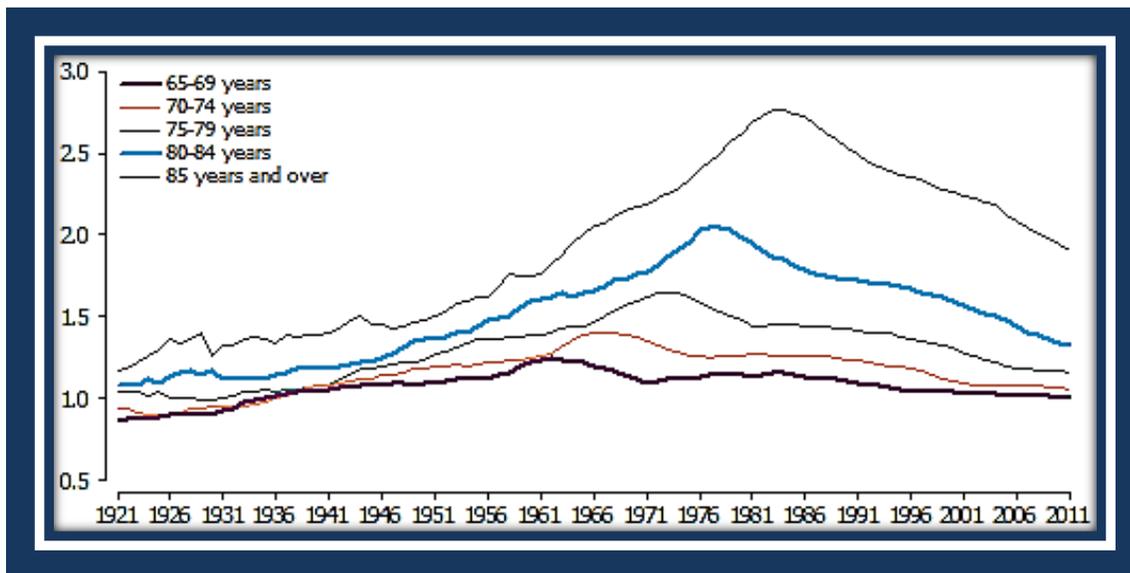
In 1901, older people constituted 4.0% of Australia's population. This proportion increased to 6.4% in 1921, 7.4% in 1941 and 8.5% in 1961, before slowly declining to 8.3% in 1971. Between 1971 and 2011, the proportion of Australia's population aged 65 years and over increased to 14%. For those aged 85 years and over it more than tripled, from 0.5% to 1.8%. In 2011, women aged 65 years and over formed 15% of the total population of women, while older men constituted a smaller proportion of all men, 13%.

The following chart shows older people as a proportion of the total population from 1941–2011



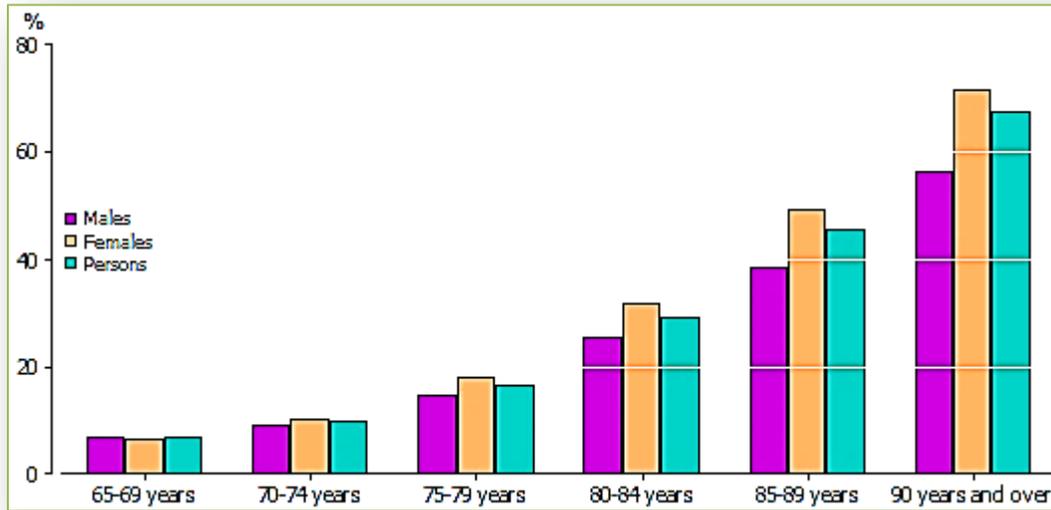
¹⁰ <http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/2071.0main+features752012-2013>

The following graph shows Older people, Female to Male ratio by age from 1921-2011



According to the 2011 Census, there were 3 million people aged 65 years and older resident in Australia, 1.4 million men, and 1.6 million women. Over half of this population were aged 65–74 years, 58% of the men and 51% of the women aged 65 years and over. The proportional difference between men and women increases with each age group, as shown in the 5-year age group ratio graph above.

3.4 Older People with Disabilities in Australia, 2011¹¹



In 2011, 537,300 older people, 19%, were identified as having a profound or severe disability. Among people in the 65–69 and 70–74 age groups, less than one in ten and around one in ten people respectively reported a profound or severe disability. This increased to 17% for the 75–79 years age group, rising to 68% for the 90 years and over age group, 58% for men and 72% for women. Older women (22%) generally had a higher rate of profound or severe disability than older men (16%).

4. Alcoholics and Drug Addicts Statistics

Australian men and women use substances at different levels, and the data shows that men overtake women in terms of rate of use, and associated harms. Alcoholics and Drug addicts could be potential segment of clients which the health retreats can target.

¹¹ <http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/2071.0main+features752012-2013>

4.1 Gender Differences¹²

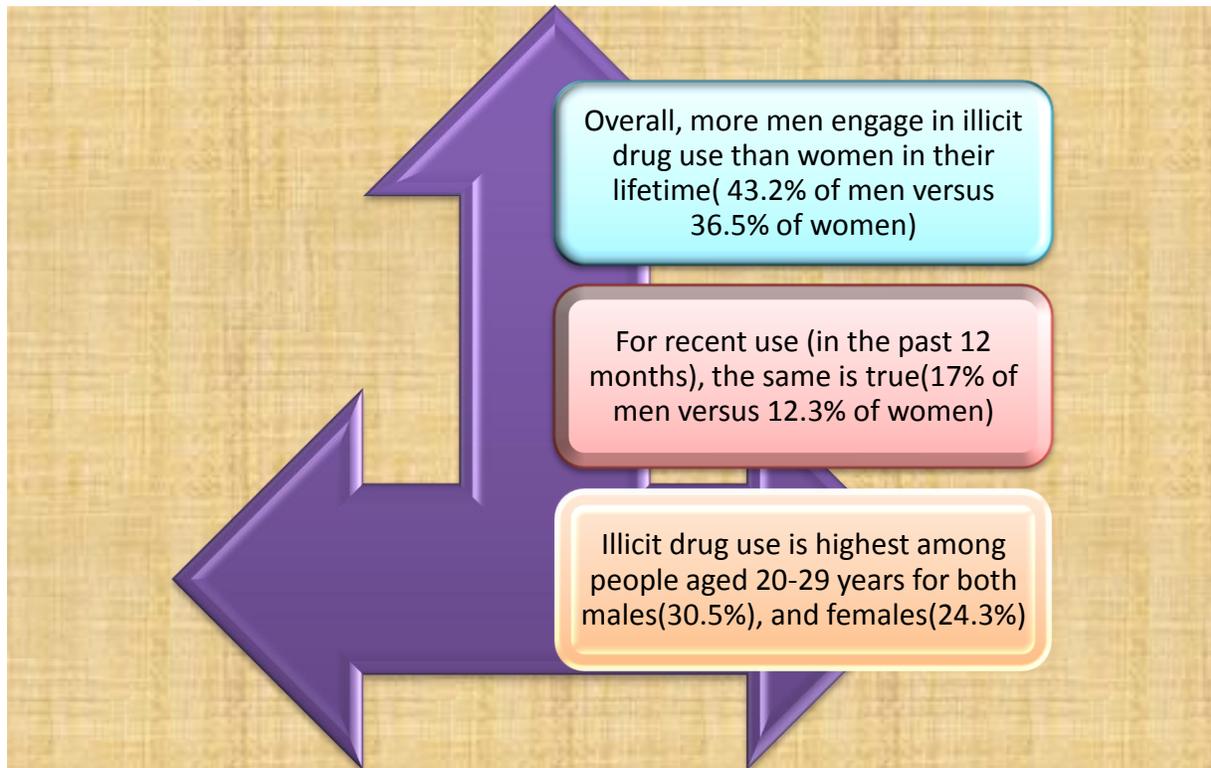


4.2 The Harmful Effects of Alcohol

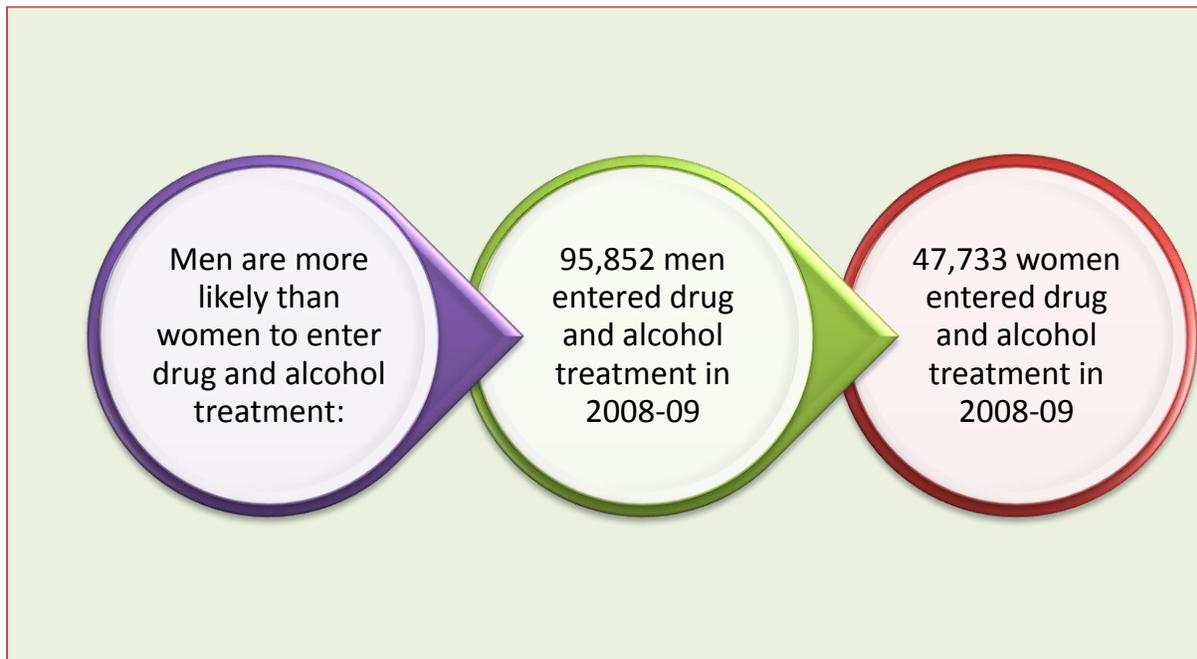


¹² http://www.druginfo.adf.org.au/attachments/1091_menandsubstanceuseposter.jpg

4.3 Illicit Drug Use



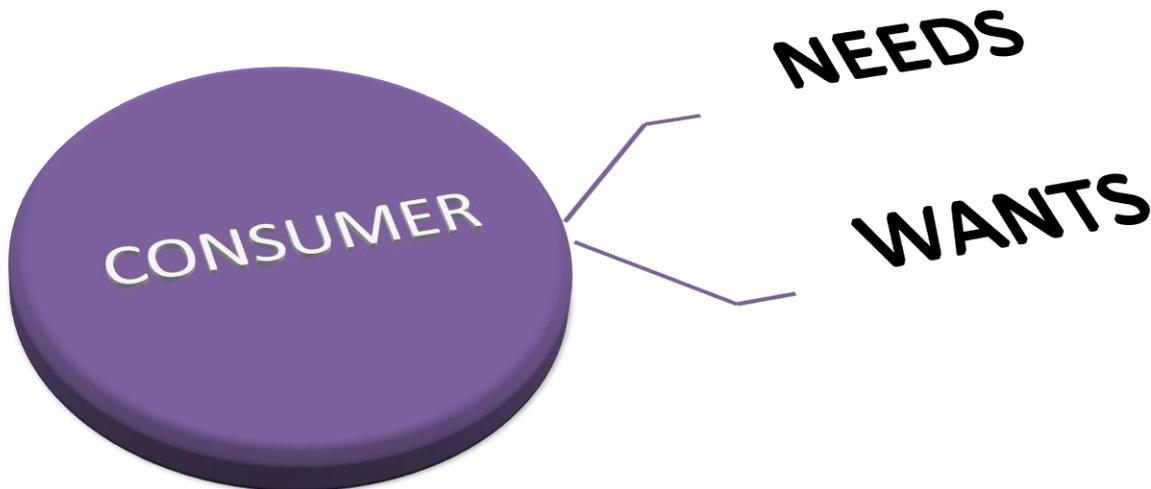
4.4 Treatment



Source: National Drug Strategy Household Survey

- Alcohol is the most widely used drug in Australia.
- 87.9% of Australians aged over 14 years had drunk alcohol at some stage in their life.
- 39.5% of drinkers consumed alcohol on a weekly basis.
- The average age at which Australians first tried alcohol was 17.0 years.
- Every week, about 25 are admitted in hospital just because of overdose usage of alcohol.
- 51.6% of Australian drinkers consume alcohol in excess of the Australian Guidelines, with 25.9% consuming more than the recommended maximum of 2 standard drinks per day. (Centre for Alcohol Policy Research, 2013)
- 1 in 6 Australian drinkers consume more than 11 drinks per occasion on a monthly basis. (Centre for Alcohol Policy Research, 2013)¹³

5. Consumer Needs and Wants



¹³ <http://www.druginfo.adf.org.au/topics/quick-statistics#alcohol>

5.1 Consumer Needs

Consumers basically concentrate on three main elements which are Budget, Place, and Time. These are the three elements most important, might practically speaking be among the first things the consumer decide.

Consumers who are affected by physical and mental problems basically need some therapy treatments like psychodynamic psychotherapy, interpersonal therapy, family work, cognitive behaviour therapy, motivational interviewing techniques and concordance work, Medical Doctor/Medicare, Depression Recovery and Diabetes Management to name a few. Therapeutic activities will include activities of daily living, meaningful occupation, social and budgeting skills.

5.2 Consumer Wants

- Consumers expect many things from health retreats such as, holistic detox retreat, juice fast, colon cleanse, and safe and effective weight loss retreat, counselling, yoga, meditation or other therapies or a simple pamper treatment at a health retreat spa. The want to achieve Improved physical health from a chronic disease, mood elevation (feel happy, motivated, positive, etc), rejuvenation and to have a life transforming effect on their life.
- Customers also wants Naturopathy, Massage, Nutrition, Life coaching, Counselling, Spiritual Philosophies, Educational Workshops, Emotional Wellbeing, Detoxification, Juice Fasting, Raw Living Cuisine, Organic Food Weight Loss, Stress Reduction, Yoga, Meditation, Vegetarian, Sauna, Spa, Beauty Treatments, Eco-friendly, Adventure/physical, Gym equipment, Hydrotherapy/Colon Cleanse, Aromatherapy, Cellular Memory Release, Art Therapy, Sports/Games, Astrology, Energy Balancing, Pilates, Fitness Classes, Iridology, Aura Soma, Hypnotherapy, Acupuncture, Hot Rock Therapy, Osteopathy, Tennis and Swimming.¹⁴

¹⁴ <http://pc.parnu.ee/~htooman/Proceedingnyomdanak.pdf>

6. Social Media and Online Opportunities

Health in Australia is now both mass market and aspirational. Promotion of healthy living continuously surrounds us and it's paying off. More and more Australian's are ensuring and placing strong value on healthy choices being an important component of their day-to-day lifestyle.

Several of the leading health resorts in Australia seen in the above sections have embossed their footprints in the cyberspace through social networking platforms such Facebook, Twitter and even Instagram thereby reaching out to a wider spectrum of audiences. The numerous likes that the Facebook pages of these retreats receive and their subsequent members count, stand testimony to the far reaching power of social media. Some statistics about leading Australian health retreats which are in Facebook are as follows

Health Retreat	Facebook Link	Number of Likes
1.Living Valley Springs	https://www.facebook.com/livingvalley	3,644
2.Golden Door	https://www.facebook.com/Goldendoorspa	6,060
3.Gawler Foundation	https://www.facebook.com/TheGawlerFoundation	1,817

<http://www.healthretreatsaustralia.com/health-wellbeing.html>

<http://www.healthretreatsaustralia.com/health-retreat-activities.html>

4. Seven Spirit Bay	https://www.facebook.com/pages/Seven-Spirit-Bay-Eco-Wilderness-Resort/138270609582294	729
5. Solar Springs health retreat	https://www.facebook.com/pages/Solar-Springs-health-retreat-Bundanoon/195794993785948	819
6. OnTrack Retreats	https://www.facebook.com/pages/OnTrack-Weight-Loss-Retreats/194741073892613	8,853
7. Cabarita Ocean Retreat	https://www.facebook.com/cabaritaoceanhealthretreat	5,575
8. Hopewood Health Retreat	https://www.facebook.com/HopewoodHealthRetreat	948
9. Byron Bay Detox Retreats	https://www.facebook.com/ByronBayDetoxRetreats	1,796
10. Misty Mountain Health	https://www.facebook.com/mistymountainhealthretreat	993

Some of the health related Television Programmes screened on several channels in Australia. These Television Programmes provides a range of information and initiatives on healthy eating, regular physical activity and overweight and obesity to assist all Australians to lead healthy and active lives including about healthy retreat/Spa and yoga retreats in Australia. Some of them are given here

- The Biggest Loser is an Australian reality show screened on Channel 10. The show features contestants who are overweight participating in a contest to lose the most percentage of weight, with teams and contestants eliminating each other.¹⁵
- Aged Care Channel (ACC) is *passionate* about continually improving the quality of life of elderly people and those who care for them. They harness the power of story telling to Engage, Inform and Inspire carers.¹⁶

¹⁵ <http://www.biggestloserretreat.com.au/about/television-programme/>

- The Better Health Channel (BHC) provides health and medical information that is quality assured, reliable, up to date, easy to understand, regularly reviewed and locally relevant.¹⁷

TV CHANNEL / TV PROGRAMME	Facebook Links	Likes
Better Health Channel	https://www.facebook.com/BetterHealthChannel	10,175
Aged Care Channel	https://www.facebook.com/AgedCareChannel	1,582
Biggest Loser	https://www.facebook.com/BiggestLoserAU	149,931

¹⁶ <http://www.agedcarechannel.com.au/>

¹⁷ <http://www.betterhealth.vic.gov.au/>