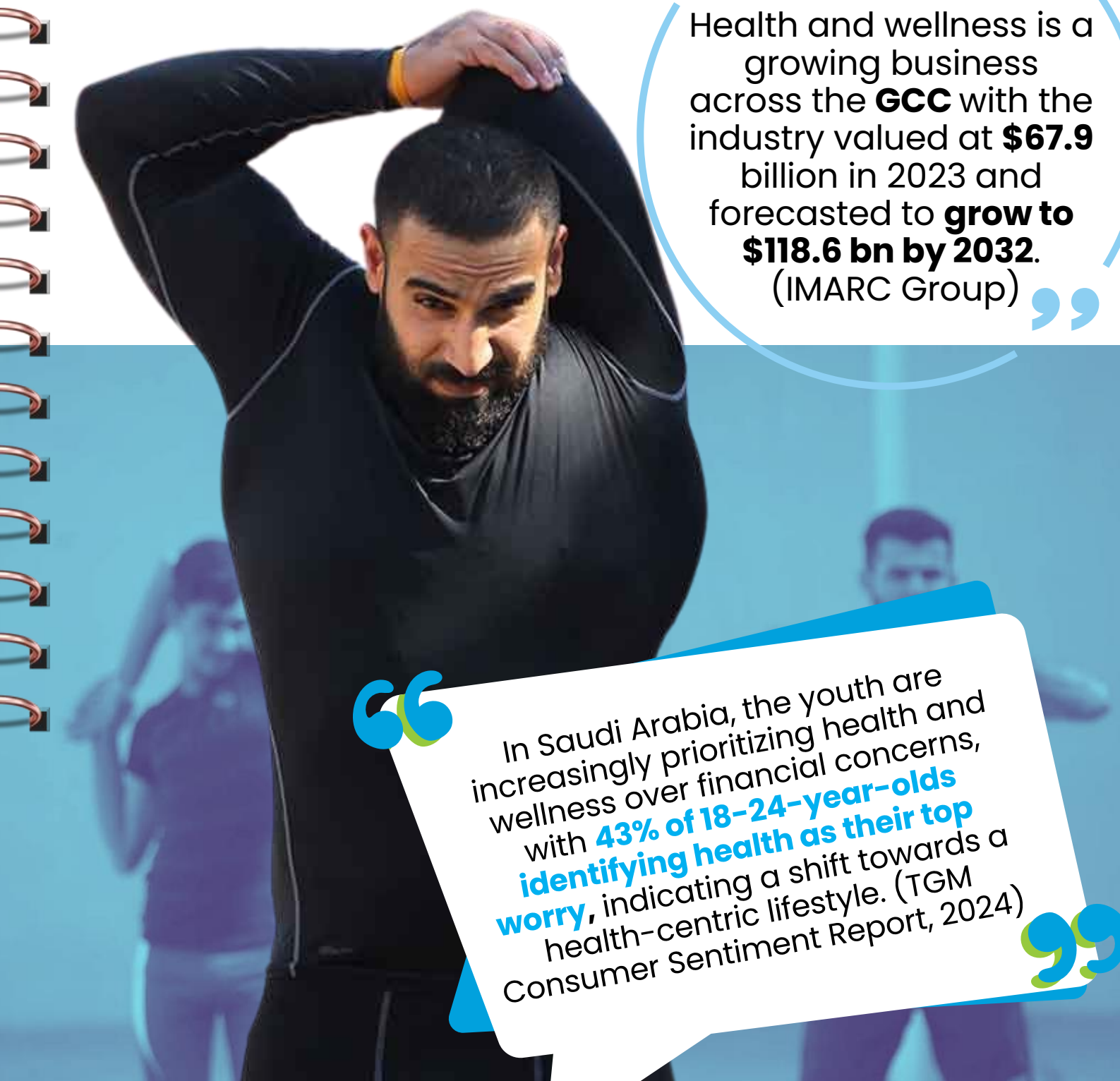
SiGHT for GROWTH

a monthly series

AUGUST | 2024

A **transformative shift** towards prioritizing **health and well-being is brewing in the Middle East, led by youth and women**. This change impacts consumer mindsets and behaviors, prompting policymakers and businesses to adapt their **strategies for an increasingly health-conscious population**. The focus on well-being encourages innovative solutions aimed at fostering **healthier communities in the region.**



> Health and wellness is a growing business across the **GCC** with the industry valued at **$67.9** billion in 2023 and forecasted to **grow to $118.6 bn by 2032**. (IMARC Group)

> In Saudi Arabia, the youth are increasingly prioritizing health and wellness over financial concerns, with **43% of 18-24-year-olds identifying health as their top worry**, indicating a shift towards a health-centric lifestyle. (TGM Consumer Sentiment Report, 2024)

A look at the Wellness Economy in the GCC region

Source: Global Wellness Institute

McKinsey research shows that consumers are most interested in **six wellness categories: health, fitness, nutrition, appearance, sleep, and mindfulness,** with people expected to increase their purchases of **both wellness products and services over the next year with a more significant shift toward services**, especially those that emphasize physical and mental health.

Factors impacting growth of the Wellness Industry in the Middle East

Rising Consumer Demand

There is a growing health consciousness due to awareness of lifestyle-related diseases, increasing the demand for wellness products and services. Additionally, luxury wellness tourism is rising, with resorts and spas providing high-end holistic health experiences.

Government Initiatives

Governments focus on enhancing citizens' quality of life by promoting health, wellness, and fitness through the development of public spaces, sports facilities, and wellness programs.

Cultural Shifts driven by women & youth

There is a cultural shift in Saudi Arabia towards women's wellness, with more women engaging in sports and fitness. The younger Middle Eastern population is influenced by social media, global trends, and a desire for a balanced lifestyle.

Corporate Wellness Programs

Middle Eastern companies are increasingly valuing employee wellness, leading to the rise of corporate wellness programs that offer fitness challenges, mental health support, and nutritional guidance.

Integration of Traditional Practices

The Middle East is experiencing renewed interest in traditional and alternative medicine, including herbal treatments, aromatherapy, and holistic practices, often combined with modern wellness methods for comprehensive health solutions.

Technological advancements

The growth of health tech, such as telemedicine, health apps, and wearables, is boosting the wellness economy by enabling individuals to monitor and manage their health proactively.

Let’s take a look at how the overall attitude towards wellness has evolved over time

How is it impacting and influencing consumer lifestyle & choices?

How can companies leverage any potential opportunities?

A look at how codes of wellness have evolved over time

REACTIVE APPROACH

"I am healthy as long as I am not sick"

PROACTIVE WELLBEING

"I need to take care to ensure I don't fall sick"

FRAGMENTED UNDERSTANDING & APPROACH TO WELLNESS

"There's so much conflicting information about health, it's hard to know what to focus on."

GROWING AWARENESS OF HOLISTIC WELLNESS

"I'm starting to realize that wellness is about more than just physical health—it's about mental, emotional, and spiritual health too."

LIMITED AVAILABILITY & ACCESS TO FACILITIES & SUPPORT

"It's difficult to find quality wellness services in my area, and even when I do, they're often too expensive."

MORE OPTIONS & EASIER ACCESS TO FACILITIES & SUPPORT

"It's much easier now to find wellness programs and resources, whether it's fitness centers, therapists, or wellness apps."

COMMUNITY-CENTRIC WELLBEING

"Wellbeing should be about supporting one another as a community, not just focusing on individual health."

INDIVIDUALISTIC & PERSONALIZED APPROACH TO WELLBEING

"I want a wellness routine that's tailored to my specific needs, not a one-size-fits-all solution."

GENDER-SPECIFIC PRACTICES

"Wellness practices need to acknowledge the different needs of men and women for better health outcomes."

INCLUSIVE APPROACH

"Wellbeing should be something that everyone can access, regardless of background or ability."

Key Trends shaping the Wellness Economy in the Middle East

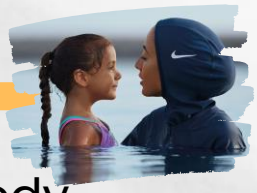
Trend 1

Individualization of Wellness

Trend 2

Rise of Urban wellness playgrounds

Trend 3



Advent of the body positivity movement

Trend 4

Spotlight on women's health & Wellbeing

Trend 5

Wellness Tourism is flourishing

Trend 6

Welcoming Wellness into the workplace

Trend 7

Embracing sport for wellbeing

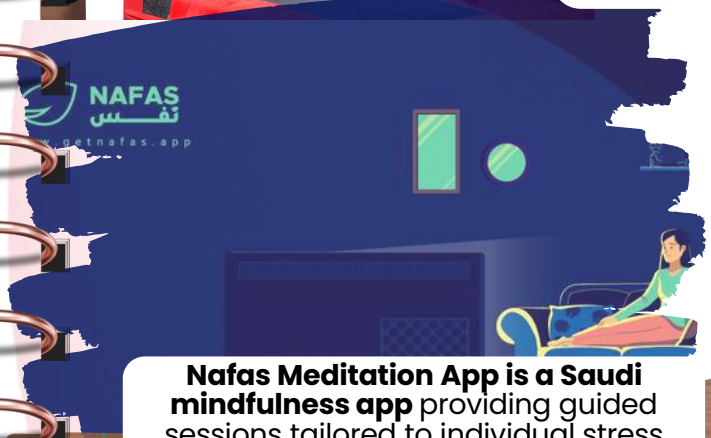
Trend 1

Individualization of Wellness

The wellness landscape in the Middle East is shifting **towards hyper-personalized approaches**, where health solutions are **tailored to the individual's unique needs and lifestyle.**

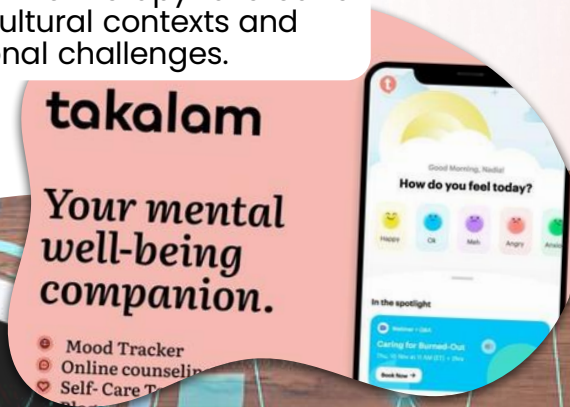
Fitness Personalization: Gyms like **Fitness First Middle East** now offer personalized training programs

Right Bite (UAE) is a personalized meal delivery service offering dietitian-approved meal plans tailored to individual nutritional needs, health goals, and personal preferences, including cultural and religious dietary requirements like halal and keto-friendly options.



Nafas Meditation App is a Saudi mindfulness app providing guided sessions tailored to individual stress levels, promoting mental well-being.

Takalam, a UAE-based app, offers personalized online therapy tailored to individual cultural contexts and emotional challenges.



HealthifyMe Arabia (KSA & UAE) is a tech-driven wellness platform offering AI-powered personalized health and fitness plans. It tailors weight loss and wellness journeys based on local dietary habits and integrates wearables like Fitbit and Apple Watch for real-time tracking.

Trend 2

Rise of Urban wellness playgrounds

Governments and real estate developers **are investing in Urban wellness playgrounds** to enhance health and active lifestyles. These multipurpose spaces support various activities, including:

- Outdoor gyms, running and cycling tracks, and sports facilities.
- Green spaces, meditation zones, and water features.
- Event spaces, interactive installations, and family-friendly areas.
- Green infrastructure and urban farming promoting local food production.

Yas Marina Circuit (Abu Dhabi, UAE): Known for its Formula 1 race, this facility opens its track weekly for cyclists and runners, promoting fitness in a world-class venue.

Sharjah Sustainable City (UAE): This eco-friendly development includes urban farming spaces, offering residents the chance to cultivate their own organic produce and learn about sustainable agriculture.

Al Ula (Saudi Arabia): The two-week flagship festival is dedicated to promoting mind, body, and wellness and offers a diverse array of holistic workshops and activities inspired by AlUla's historical and natural heritage.

Dubai Canal Cycling and Running Tracks (UAE): A popular urban destination that includes dedicated running and cycling tracks along the Dubai Canal, encouraging residents and tourists alike to stay active.

Trend 3

Advent of the body positivity movement

The body positivity movement is gaining traction in the Middle East but faces challenges such as societal pressure to conform to traditional beauty standards, limited media representation, and a lack of local voices. As discussions evolve, the movement is likely to **strengthen, promoting acceptance and diversity in beauty standards**, especially among younger generations who advocate for inclusivity and appreciation of all body types.

The Modist is a luxury e-commerce brand in Dubai that specializes in modest fashion, promoting inclusivity and diversity in body types. It features models of various shapes and sizes, empowering women to embrace their individuality. The brand encourages self-expression and body confidence, advocating for body positivity in the luxury fashion space.

Dove Middle East has launched campaigns focused on real beauty and inclusivity, encouraging women to embrace their natural selves.

Nike launched its "Victory Swim" collection in the MENA region, promoting modesty, inclusivity, and performance in swimwear. The collection celebrates diversity by offering functional clothing for all body types and showcasing women of various sizes and abilities, challenging traditional beauty norms in the area.

Trend 4

Spotlight on women's health & Wellbeing

Women in the region have been at the fore-front of change when it comes to overall health & wellbeing. While her effort has been on raising a healthy family, today the **spotlight is on her own health & wellbeing**.

Several initiatives led by the government aims to **empower women through a holistic approach to wellness**, focusing on preventive care, personalized plans, and educational support.

Olay Arabia's "Fearless Women" Campaign highlights stories of women in the MENA region who have overcome personal and health-related challenges. The campaign promotes the idea that self-care and inner strength are vital components of overall well-being, encouraging women to prioritize both mental and physical health.

The Women's Health Campaign (UAE): Led by the UAE government, this initiative focuses on preventive health checks, promoting regular screenings for breast and cervical cancer, and encouraging women to prioritize their health with access to education and resources.

"She's Mercedes" by Mercedes-Benz Middle East
This platform celebrates and supports women by offering wellness-related experiences and content. She's Mercedes collaborates with women leaders and influencers in the region, offering workshops, wellness retreats, and content focused on self-care, mental health, and achieving balance in professional and personal life.

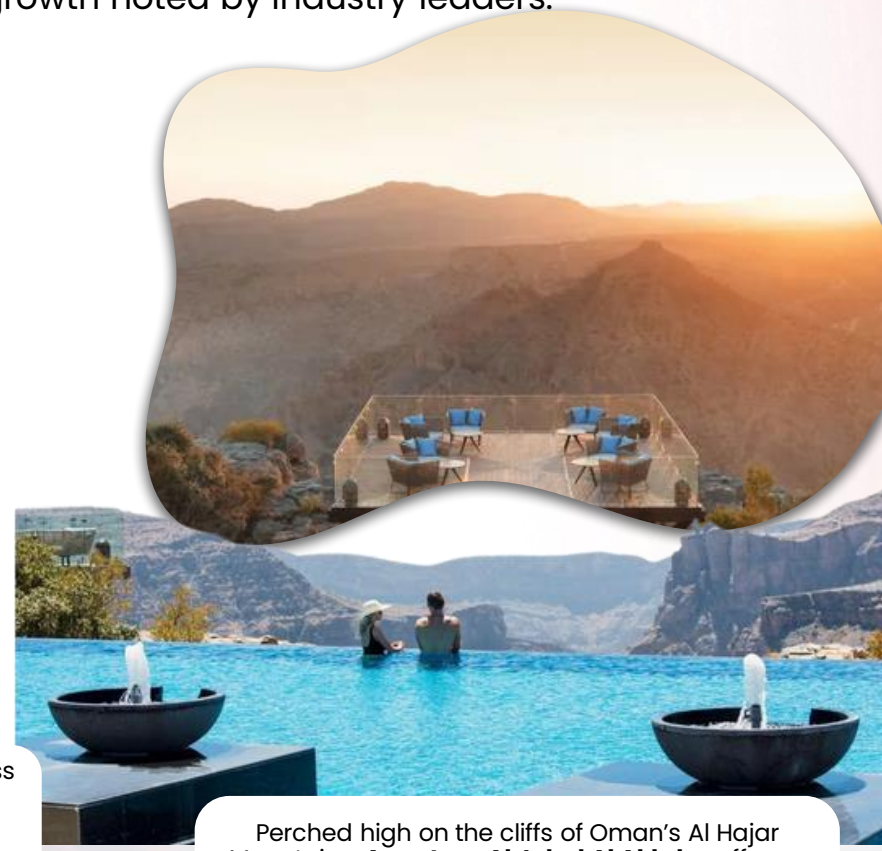
Trend 5

Wellness Tourism is flourishing

Post-pandemic, there has been a **surge in travel focused on physical and mental well-being**, leading to rapid growth in wellness tourism, projected to reach $1.3 trillion by 2025.

The Middle East is emerging as a key destination, uniquely **blending local culture and traditions in its wellness offerings**, such as hammams and treatments with local ingredients. This region accounted for 18% of the global wellness tourism market in 2022, with significant growth noted by industry leaders.

The Retreat Palm Dubai (UAE): A luxury wellness resort offering holistic treatments with an emphasis on detox, fitness, and mindfulness, blending global wellness trends with traditional Middle Eastern practices.



Perched high on the cliffs of Oman's Al Hajar Mountains, **Anantara Al Jabal Al Akhdar** offers a blend of adventure and wellness. The resort provides personalized wellness journeys that include mountain meditation, traditional hammam rituals, and spa treatments using Omani frankincense.

Amaala (Saudi Arabia): A luxury wellness destination under development on Saudi Arabia's Red Sea coast, Amaala will focus on wellness, mindfulness, and sustainability, making it a prime example of how the Kingdom is prioritizing wellness tourism as part of Vision 2030.

Trend 6

Welcoming Wellness into the workplace

The work environment in the Middle East is evolving with trends such as digital transformation, hybrid models, and sustainable practices. Companies are adopting a more inclusive culture, focusing on holistic well-being. This includes **enhanced mental health support, flexible hours, and diverse wellness programs** like fitness, nutrition, stress management, and mindfulness workshops, along with access to wellness apps for personalized plans.

"Cult for business" typically refers to an extraordinary and enthusiastic organizational culture that profoundly engages employees, leading to exceptional commitment and performance. Many leading organizations, such as Microsoft, BCG, Deloitte, and Caterpillar, exemplify this approach.

Careem (UAE): The ride-hailing giant Careem promotes wellness through its employee well-being programs, which include fitness memberships, mental health support, and flexible work schedules. Careem also provides access to wellness apps that offer personalized plans, from meditation sessions to nutrition tracking**.**

Saudi Aramco: As part of its employee wellness strategy, Saudi Aramco offers on-site fitness centers, stress management workshops, and nutritional guidance. They've also integrated flexible working hours and mental health support to ensure employee well-being is prioritized.

Trend 7

Embracing sport for wellbeing

Sport is rapidly growing in the Middle East, with an **expected industry growth of 8.7% by 2026**, compared to the global rate of 3.3%. Key points include:

- Integration of sports into daily life, with policies like 150 minutes of physical education weekly in Dubai schools.
- Sports are now essential in urban planning for livability and quality of life.

Youth are engaging with sports differently; non-traditional sports like padel have seen 40-50% annual growth from 2019-2022 in the UAE and are rising in Saudi Arabia.

As part of the **Riyadh Season festival, Saudi Arabia has launched various high-profile sporting events,** including color run, WWE matches and Formula E racing, alongside local competitions. These events attract international attention and promote sports participation and a more active lifestyle among the local population.

Oman's ultra-endurance Desert Marathon challenges participants with a 165 km course over six days, promoting extreme fitness while showcasing the country's natural beauty through a blend of sport, adventure, and environmental immersion.

The Riyadh Marathon is one of Saudi Arabia's flagship sporting events, reflecting the country's growing focus on promoting fitness and physical activity. Here's a detailed overview of the event:

Mind-the-Gap

Here is a snapshot of the generational mindsets to help better connect with them...

BABY BOOMERS
(1946 - 1964)

ACTIVE AGING | QUALITY OF LIFE | TRADITIONAL PRACTICES

Baby Boomers are changing the perception of aging by emphasizing an active, healthy lifestyle. They engage in group fitness activities, prioritize preventive health measures, and value regular checkups. Additionally, they appreciate traditional home remedies and maintain a nutritious diet to enhance longevity and quality of life.

PREVENTIVE CARE | BALANCING ACT | STRESS MANAGEMENT

Gen X prioritizes regular health screenings, a balanced diet, and physical activity to prevent age-related problems. They often juggle the demands of aging parents and children, impacting their health approach. With many in peak careers, they rely on meditation, mindfulness, and exercise for stress management.

GEN X
(1965 - 1980)

GEN Y
(1981 - 1996)

WORK-LIFE BALANCE | FITNESS TECH | NUTRITION AWARENESS

Millennials prioritize work-life balance and view health as a holistic concept, integrating fitness into their daily lives. They embrace fitness technology and wellness trends, focus on nutrition by choosing organic, non-GMO, and locally-sourced foods, and are open to alternative diets like veganism or keto.

MENTAL HEALTH | BODY POSITIVITY | SOCIAL RESPONSIBILITY

Mental health is crucial for Gen Z, who openly discuss issues, seek therapy, and use digital wellness tools. They value self-care, body positivity, and fitness, prioritizing balance and holistic health by combining traditional fitness with mindfulness. Additionally, they make ethical choices like plant-based diets, sustainable brands, and social justice advocacy.

GEN Z
(1997 - 2012)

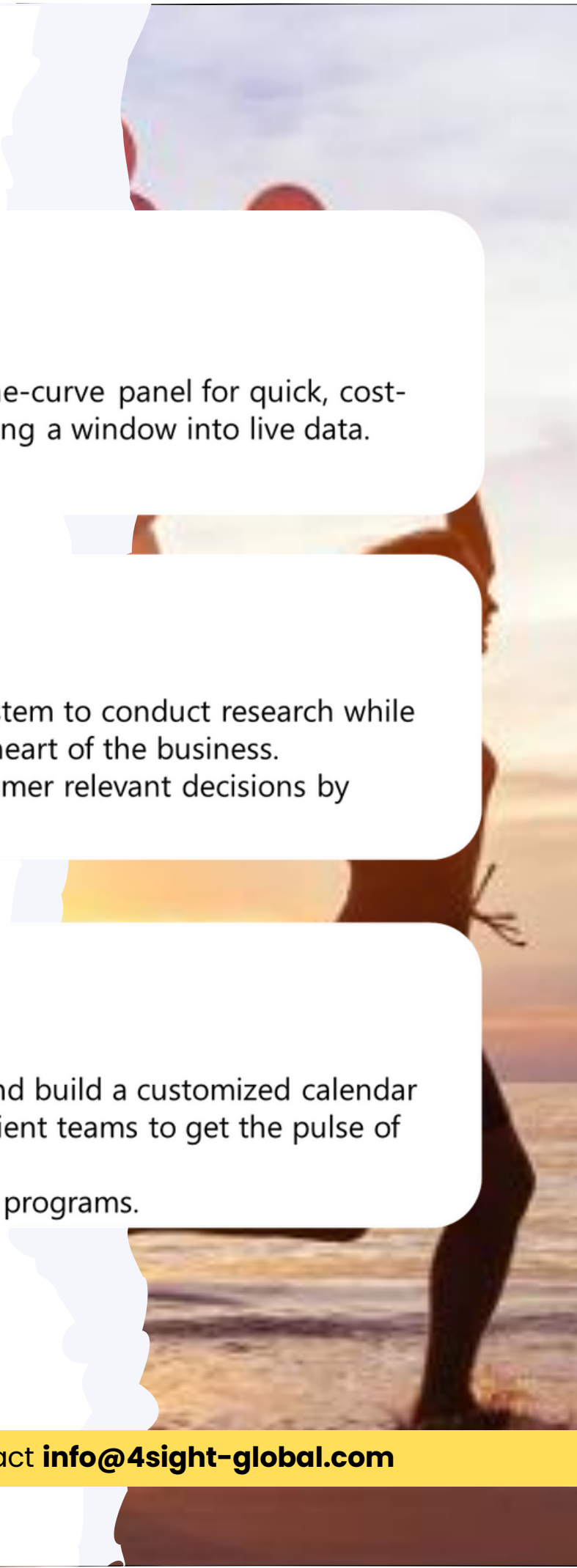
GEN ALPHA
(2012 onwards)

DIGITAL HEALTH | HOLISTIC WELLBEING | SUSTAINABILITY

Gen Alpha views health and well-being as interconnected with digital tools, growing up with fitness apps, health trackers, and telehealth services. They perceive health holistically, including physical, mental, emotional, and environmental aspects, in an era where sustainability and mindfulness are widely discussed.

OUR

4SiGHT Live Suite



PANEL UAE | KSA

Our pre-recruited ahead-of-the-curve panel for quick, cost-efficient research needs, offering a window into live data.

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Enables clients to make consumer relevant decisions by testing on the go.

CONSUMER CONNECTS

4SiGHT's solution to curate and build a customized calendar of immersive interviews for client teams to get the pulse of the consumer.
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OUR

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SPRINT+

Provides an innovative boost to your iterative process by making it more AGILE through co-creation workshops, giving wings to potential ideas/improvements

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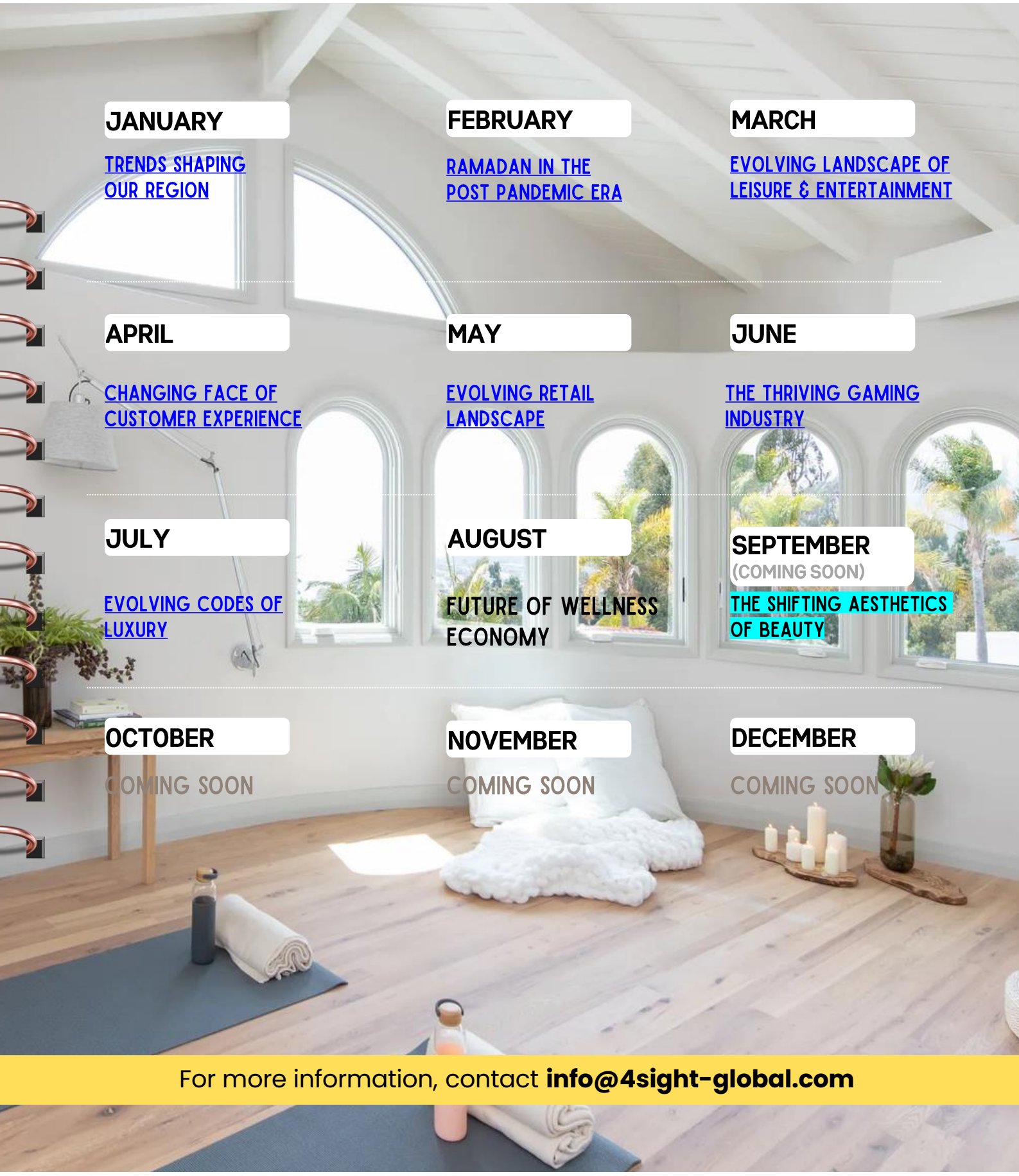
Calendar



JANUARY

TRENDS SHAPING OUR REGION

FEBRUARY

RAMADAN IN THE POST PANDEMIC ERA

MARCH

EVOLVING LANDSCAPE OF LEISURE & ENTERTAINMENT

APRIL

CHANGING FACE OF CUSTOMER EXPERIENCE

MAY

EVOLVING RETAIL LANDSCAPE

JUNE

THE THRIVING GAMING INDUSTRY

JULY

EVOLVING CODES OF LUXURY

AUGUST

FUTURE OF WELLNESS ECONOMY

SEPTEMBER
(COMING SOON)

THE SHIFTING AESTHETICS OF BEAUTY

OCTOBER

COMING SOON

NOVEMBER

COMING SOON

DECEMBER

COMING SOON

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