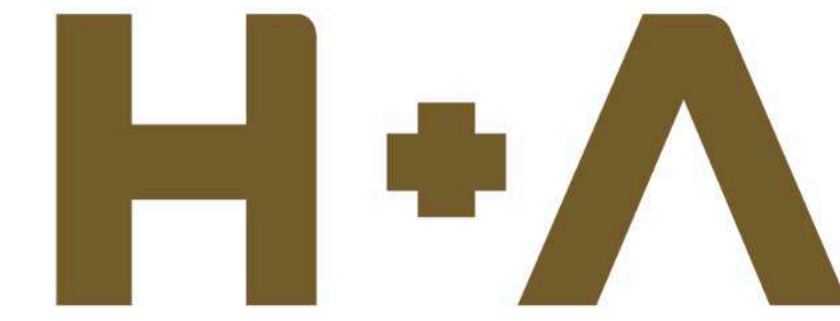
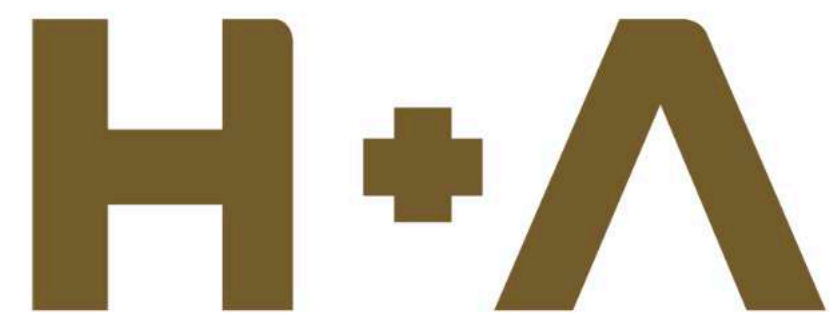


**The future of  
healthcare**  
- How changes in  
consumer demand  
are leading an  
exciting + profitable  
new era in  
hospitality



**Experts in  
Hospitality +  
Healthcare**

October, 2024 | DUBAI



RIBA Chartered, Dubai-based architecture and interior design studio that creates human-centric spaces for both hospitality and healthcare. Prioritising the guest and patient experience is central to their ethos, with a research-based methodology underpinning a rigorous and pragmatic approach to execution and delivery. Creating agency for both client and consumer, their progressive philosophy allows for sensitive placemaking, authentic storytelling and a commitment to integrating wellness strategy into every space, building and community.

<https://h-a.global/>

@hplusa\_architecture



## **Stas Louca, Founding Partner + Managing Director, H+A**

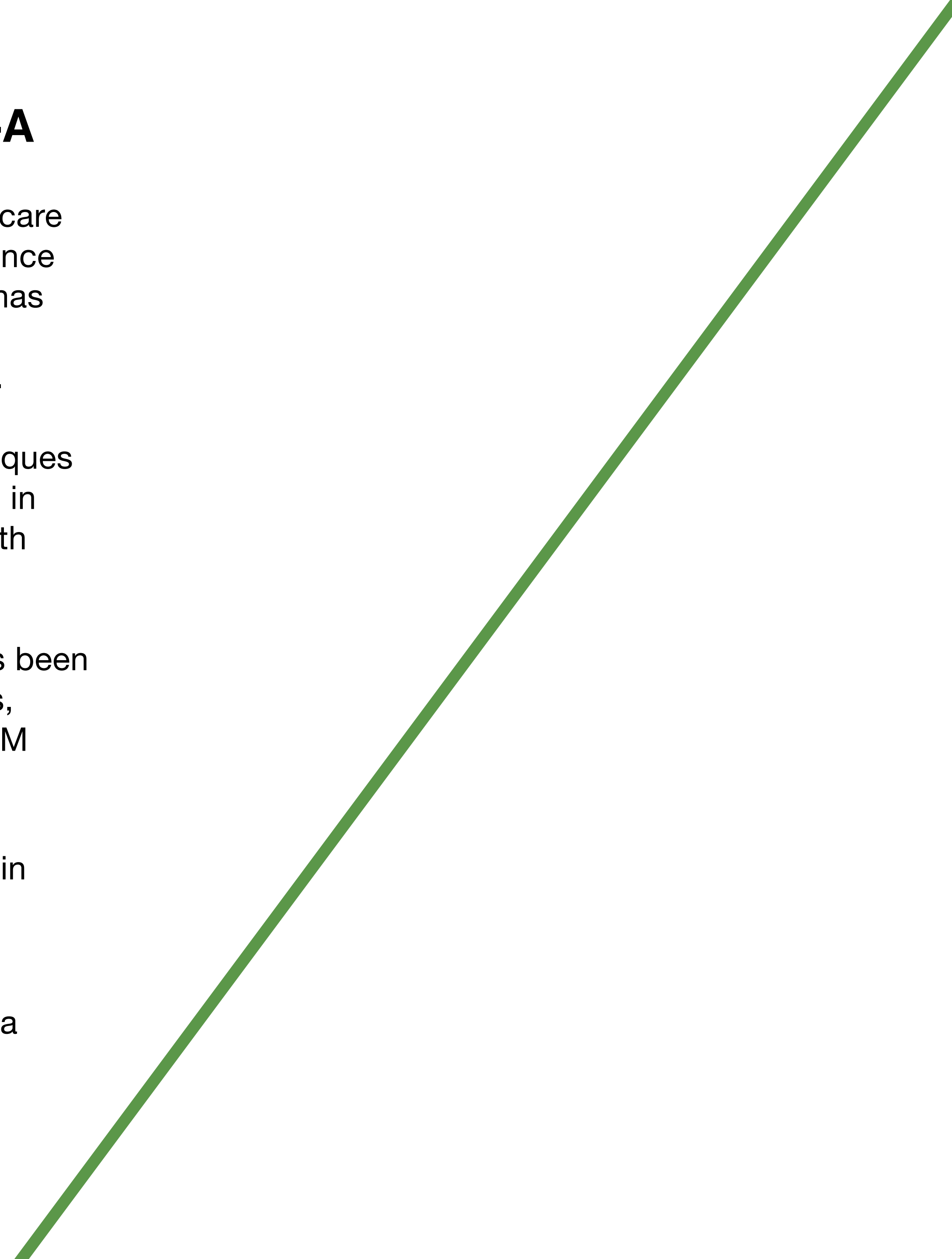
Stas Louca is one of the region's most established leaders in the field of Healthcare Design, architecture, interior design and planning; with over 35 years of experience delivering major complex projects around the world. His commercial expertise has contributed to the stellar success of H+A, a Dubai-based studio that is now recognised as one of the fastest growing, specialised firms in the MENA region.

His wealth of knowledge in strategy and operations as well as innovative techniques in design and construction have led to H+A winning projects for top-tier brands in both the private and public sectors, with a distinct capacity for collaborating with large multi-disciplinary groups.

Stas's pioneering approach to healthcare planning and business operations has been widely acknowledged, alongside a deep understanding of sustainable practices, developed through a career that has spanned management roles at both AECOM Australasia (Head of Architecture) and Perkins & Will, Middle East.

His pioneering sustainability and wellness strategies were a contributing factor in his appointment as a Peer Reviewer for the Ministry of Parliamentary Affairs in Abu Dhabi, and as a Contributing Editor to Forbes, Middle East.

Today, H+A competes with the region's largest branded firms, differentiated by a unique manifesto - to elevate Healthcare and Hospitality design through smart, efficient organisation, dynamic leadership and a human-centric approach.



# David Lessard, Partner and Design Director, H+A

David Lessard is one of the Middle East's most sought after thought leaders in the field of hospitality and lifestyle residential architecture. His aptitude for creating human-led experiences are driven by a desire to place empathy over ego when seeking solutions, placing wellness at the heart of H+A's core values.

As Partner and Design Director of one of the fastest growing practices in the region, David's innovative but pragmatic approach has seen the firm's number of hospitality projects expand, alongside Founder Stas Louca's robust portfolio of Healthcare clients.

Championing a culturally sensitive, contextual and sustainable approach for contemporary design, his rule book serves to benefit clients across all sectors of the business, from architecture to interior design, and has contributed to his profile as an influential opinion leader, speaker and commentator in the press.

David's rigorous approach has translated into successful developments outside of the firm's base in Dubai, including resorts in the Seychelles, Sri Lanka and Saudi Arabia - each one staying true to his philosophy of creating unforgettable experiences for both guests and operators.

Today, he leads a dynamic team of creatives in building H+A, a design studio that has vaulted the curve to become regional experts in wellness-inspired strategies across healthcare and hospitality, connecting research and insight to create innovative solutions in both architecture and interior design.



RITZ CARLTON SIGNATURE VILLAS, RAS AL KHAIMAH - DESIGNED BY H+A

The healthcare industry is undergoing a significant transformation, driven by factors such as rising healthcare costs, an aging population, and technological advancements. These changes are creating **new opportunities** for hospitality operators to enter the healthcare market and diversify their revenue streams.

**There are multiple  
trends that are now  
defining  
the \$1.8 trillion global  
wellness market  
in 2024**



# Key Trends



- Shift to outpatient care and home-based services
- More consumer-centric options being demanded by users of both hospitality and healthcare
- Growing demand for wellness and preventive care
- Integration of technology in healthcare delivery
- Rise of medical tourism



Healthcare, much like  
hospitality is becoming  
increasingly **consumer-centric**,  
driven by seismic generational  
shifts and a demand for highly  
personalised experiences

Consumerism is powering a complete remodel of the healthcare market. This transformation however, is about much more than patient-centric innovations.

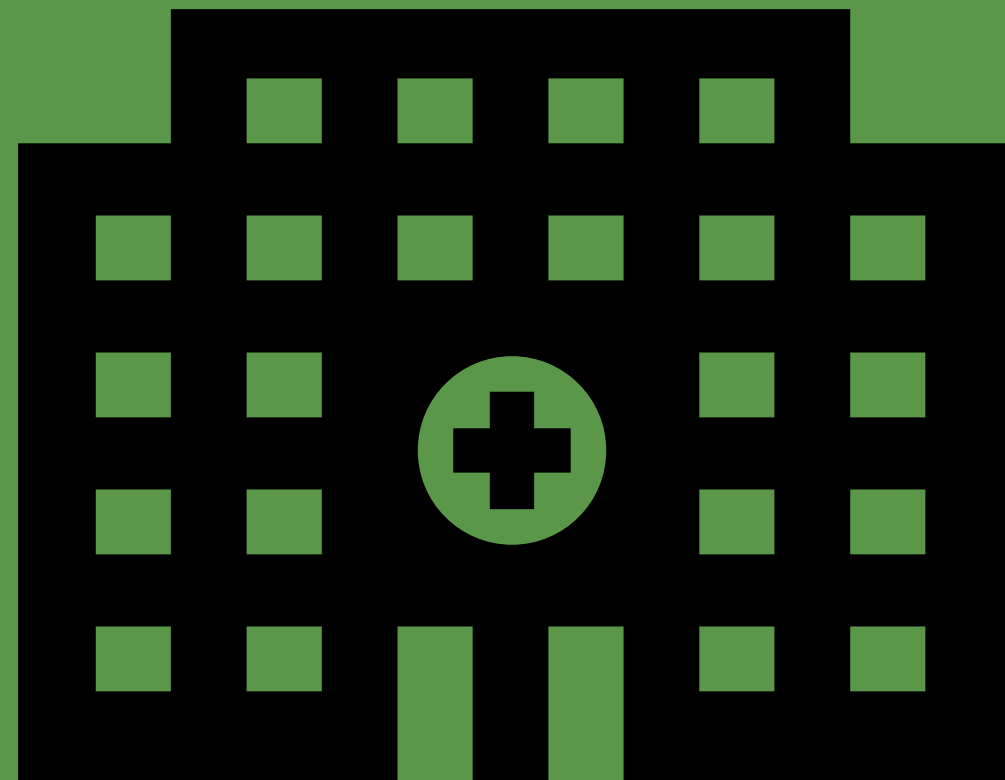
The real change is the emergence of an entirely new business design that ignores the boundaries and economic framework of the existing healthcare system.

This new direction is at the heart of the new health and wellness industry, and it will power new consumer health, wellness, and better-living products and services, including how and where they are administered.



Oliver Wyman Report, Future of Healthcare, 2024

**The hospitality industry in 2024 is poised for significant transformation, driven by evolving consumer behaviours and technological advancements.**

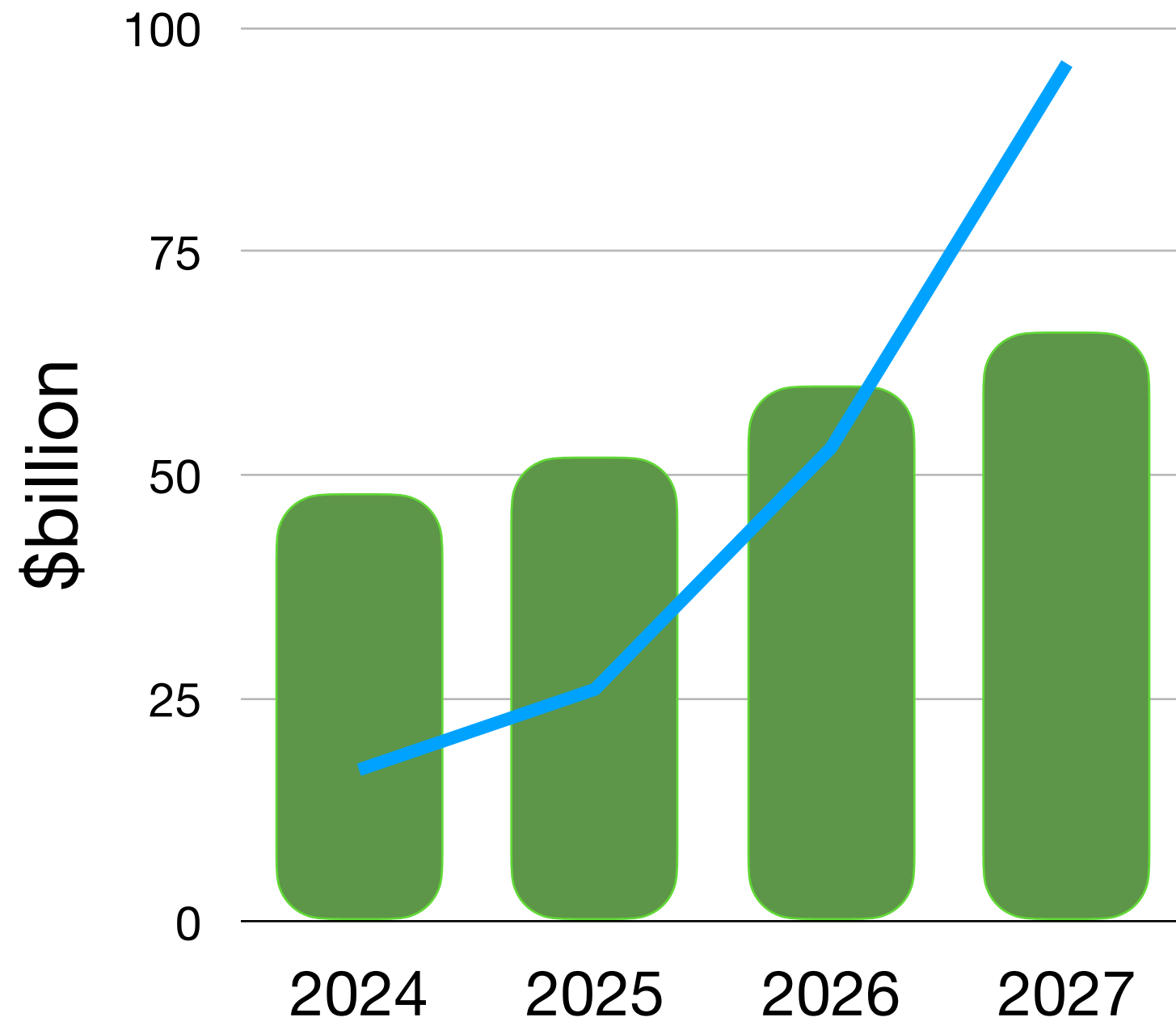


As we approach the last quarter of 2024, the hospitality industry is seeing a surge in innovative operating concepts, most importantly in the lifestyle segment. New brands are emerging, focusing on niche markets and unique guest experiences.

These brands are reshaping the traditional hotel model by integrating local culture, personalized services, and sustainable practices into their core values.

These concepts cater to the increasing demand for longer stays and a blend of work and leisure, particularly appealing to remote workers and digital nomads.

In the United States alone, it's estimated that the wellness market has reached \$480 billion, growing at 5 to 10 percent per year.

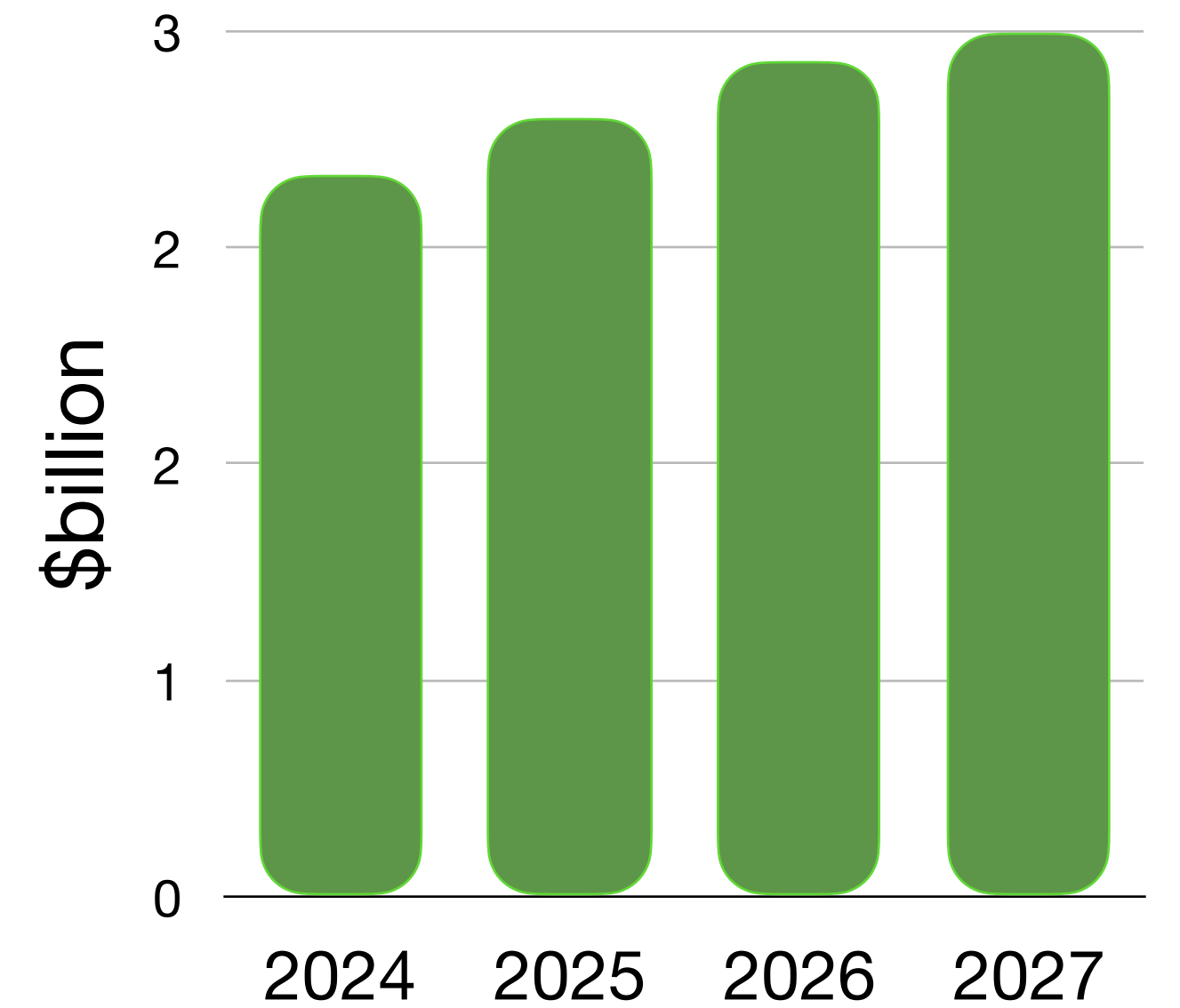


Eighty-two percent of US consumers now consider wellness a top or important priority in their everyday lives, which is similar to what consumers in the United Kingdom and China report (73 percent and 87 percent, respectively).

Wellness is a top or important priority in the everyday lives of citizens in the USA, UK and China.

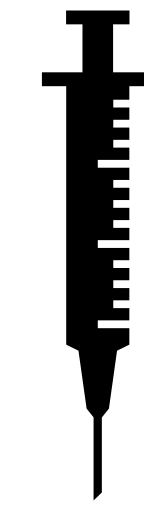
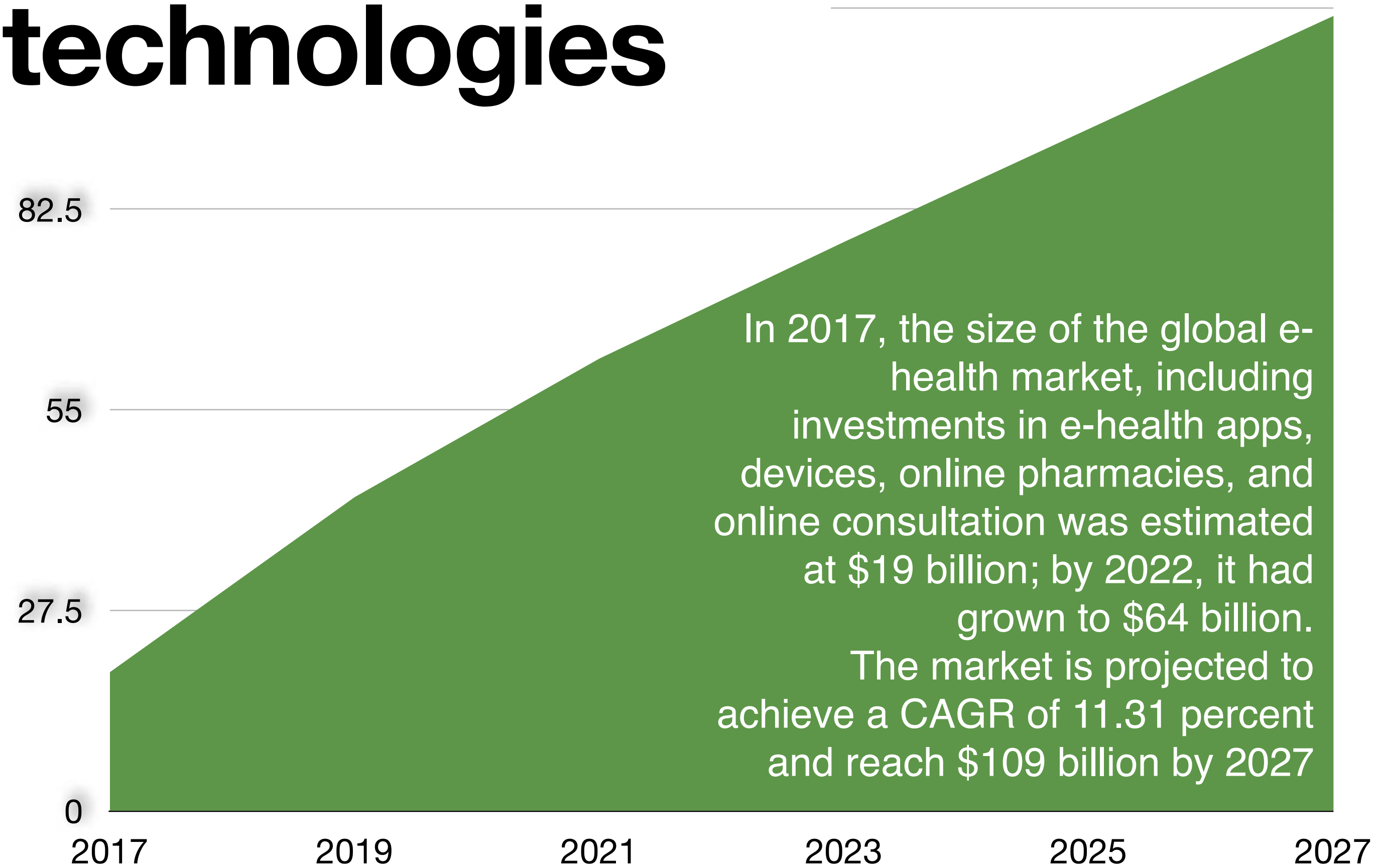


Retail market size of health and wellness products in the United Arab Emirates was around US\$2.02 billion 2021. This is forecasted to reach approximately US\$2.57 billion by 2025



**There are multiple factors  
driving change in the  
healthcare industry -  
simultaneously creating  
gaps that can be filled by  
experienced luxury  
operators**

# Rise in self care and at-home technologies



## At home

At home testing is already commonplace:

- Testing for vitamin and mineral deficiencies
- Cold and flu symptoms
- Cholesterol levels
- Heart rate
- Diabetes



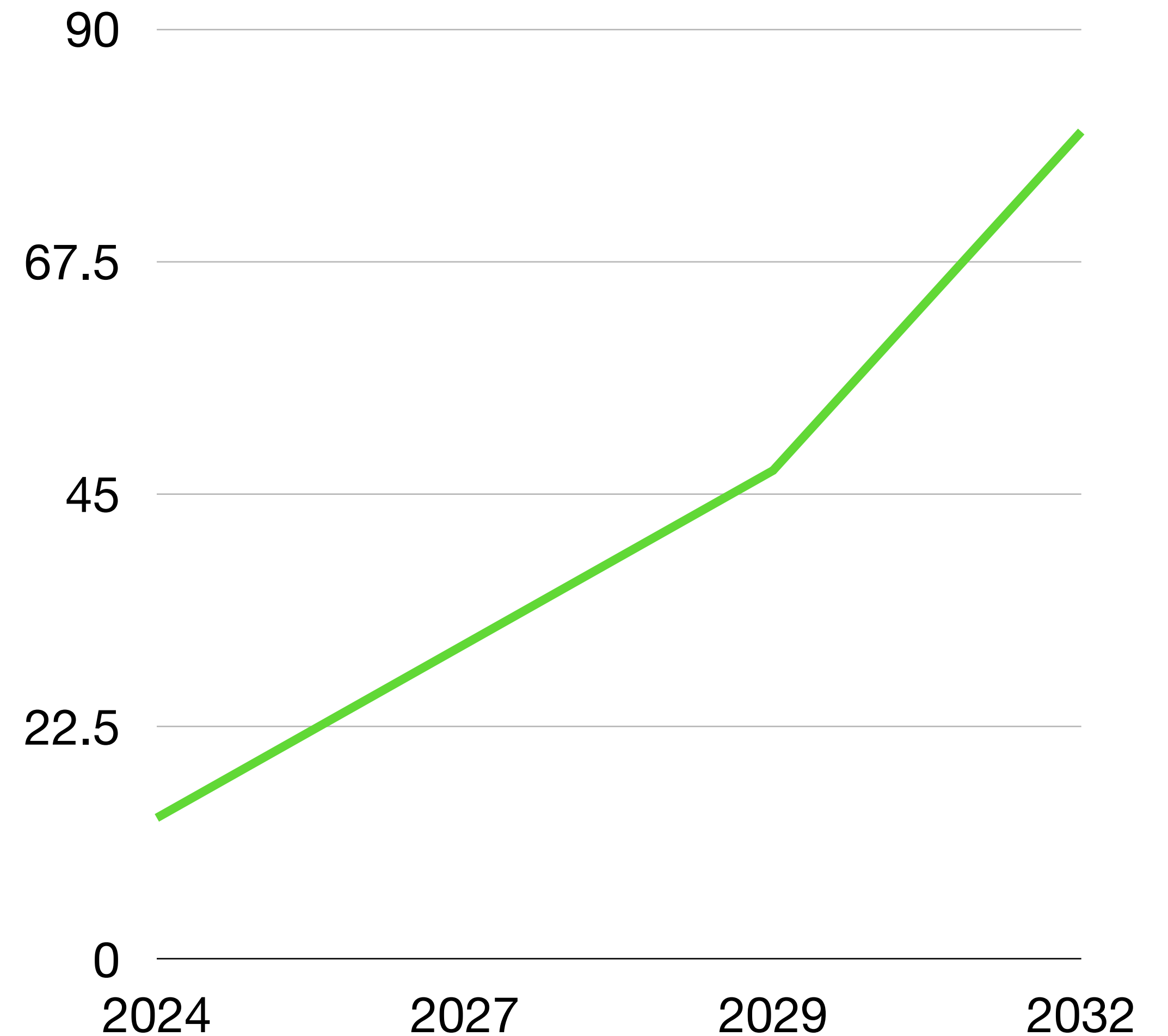
## Biomonitoring

- Rapid growth of biomonitoring and wearables
- Breakthrough technologies, e.g. biometric rings
- Blood sugar monitoring and recommendations
- Medication, sleep cycles and overall health apps

# Medical Tourism

A new report from Polaris Market Research predicts that the global medical tourism market will reach US\$80.07 billion by 2032, up from \$13.69 billion in 2024.

It is expected that the industry will generate a compound annual growth rate (CAGR) of 24.7% from 2024 to 2032.



Caring for people's needs is at the core of healthcare, aligned to the similar values of hospitality. Appropriate environments are required to provide safe and healthy spaces for providers and systems to keep communities thriving.

How healthcare is accessed is now changing. Due to technology and consumer demand, healthcare is becoming decentralised into the community, with 'medical offices', 'outpatient clinics' and 'rehabilitation centres' proliferating globally, most of all where private healthcare is prevalent

# Aligning values in healthcare + hospitality





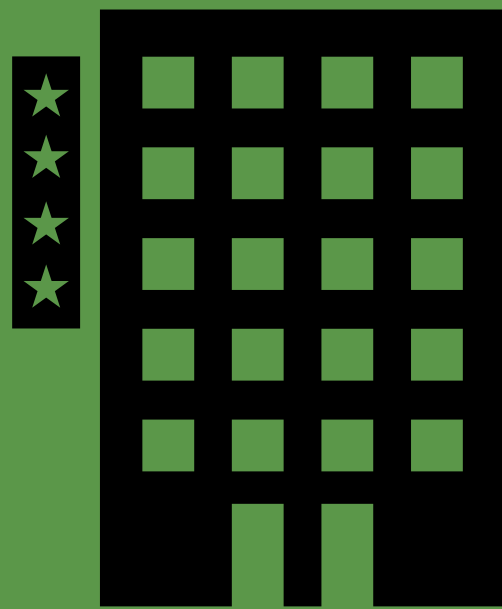
*“Across the region we are seeing a growing prevalence of community healthcare units, offering health and wellness packages and ‘at home’ self care. We are seeing the proliferation of healthcare solutions in office buildings and malls. It seems like the obvious next step for hotel operators to capitalise on this evolving trend.”*

**Stas Louca, H+A**

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*“As patient care outside the hospital boundaries becomes more normalised, it stands to reason that patients seeking basic healthcare will actively choose to access that in an environment that is more akin to their lifestyle choices. We can already see this happening with medical tourism driven by the economic choices of those seeking aesthetic procedures.”*

# What's driving demand for outpatient sites?



- **Demographic trends**, consumer preferences, technology
- Focus on a long term **lifestyle** attitude to positive health and wellness, increasing with each generation
- **Early detection** and minimally invasive procedures that don't require a traditional clinical environment
- Need for more convenient, **accessible**, enjoyable care options and experiences
- This shift towards more outpatient facilities is driving interest from **investors** and operators alike, who are looking to benefit.
- **Cost of new builds** for hospital outpatient care has rocketed, leading to many hospital groups to outsource real estate to accommodate patients

- **Repurposing existing spaces for healthcare services:** Hotels and resorts can convert underutilized areas into clinics, wellness centers, or senior living facilities.
- **Partnering with healthcare providers:** Hospitality operators can collaborate with hospitals, clinics, and home health agencies to offer a seamless patient experience.
- **Developing specialized healthcare packages:** Hotels can create packages that combine accommodation with medical treatments, wellness programs, or rehabilitation services.
- **Leveraging technology:** Hospitality operators can use technology to enhance the patient experience, improve efficiency, and reduce costs.

## Opportunities for Hospitality Operators



*“There are significant benefits for hotel operators, especially in the MENA region where wellness is a distinct priority, luxury comes as standard and plot sizes can accommodate additional or repurposed facilities. We feel it’s also a brilliant way for hospitality brands to differentiate themselves in a crowded marketplace, and provide a strong and experiential USP to both guests and investors.”*

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**David Lessard, H+A**

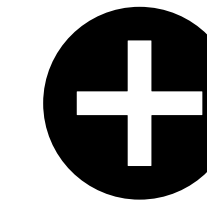
## **Benefits for hospitality operators**

- Increased occupancy rates and revenue
- Diversification of revenue streams
- Enhanced brand reputation and customer loyalty
- Access to new markets and customer segments

## Case Study

*Surgical Recovery and  
Browns Hotel, London*

**Hotel chain partnering  
with hospitals or care  
centres to offer post-  
surgery recovery  
packages**



Surgical Recovery based in London has partnered with luxury Mayfair property Brown's Hotel to offer post surgery options

Recovering in hotel is often covered by health insurance and can sometimes be less expensive than an overnight hospital stay - and in this case offers an environment that can enhance recuperation.

Hanieh Asadi, founder - *"Our mission is to provide a world-class experience and exceptional level of care for each of our patients"*



## Case Study

### *Vivari Spa + Aesthetics, South Africa*

Vivari Aesthetics is a specialised cosmetic surgery clinic and hospital set within the tranquillity of the luxurious Vivari Hotel and Spa in Johannesburg. Vivari Aesthetics is the brainchild of Dr. Anushka Reddy, a medical doctor and owner of Medi-Sculpt, a specialised minimally invasive cosmetic and anti-ageing clinic also on the same property. Dr Reddy's vision is to provide a luxurious boutique environment that is the facility of choice for both medical practitioners and patients.

Vivari non-invasive treatments includes the full range of cosmetic surgery.

Vivari Aftercare is a specialised discreet recovery centre located at the 5 star Vivari hotel which is centred on patient care and after plastic surgery.

Recuperating patients stay in a luxurious deluxe suite with specialised ergonomic beds which help reduce swelling, have large bathrooms with showers, a spacious lounge and outside balcony.

## Integrating hotel and hospital on a single site

- Around the clock nursing care for the first 72 hours after surgery
- Standard medical equipment available for monitoring if needed
- Inclusive of all meals prepared by hotel chef
- Discreet pickup from another hospital if surgery performed at another venue
- Oxygen and IV fluid administration if needed
- Hyperbaric oxygen therapy to aid healing
- Lymphatic drainage massage to reduce swelling
- IV nutritional therapy containing Vit C, Zinc and selenium to aid recuperation
- Welcome care gift with luxury gown and slippers

## Case Study

*Four Seasons Hotel Group*

### Resort offering wellness programs for corporate clients

As part of their brand offering, the Four Season also package their wellness assets to suit corporate groups that are just as beneficial out of season



“From a guided beachside meditation to soul-soothing spa treatments, Four Seasons wellness offerings are enriched by the world’s most extraordinary settings and the warmth of our people. Creating space for inspiration, growth, and transformation, we see wellness as a way of life.”

<https://www.fourseasons.com/campaigns/corporate/wellness-experiences/>

- Conduct market research to identify target customer segments and healthcare needs.
- Develop a comprehensive strategy that outlines the services offered, pricing strategy, and marketing plan.
- Invest in staff training and development to ensure high-quality care and service.
- Partner with healthcare providers and technology companies to leverage their expertise and resources.

# H+A

## Recommendations for hospitality operators



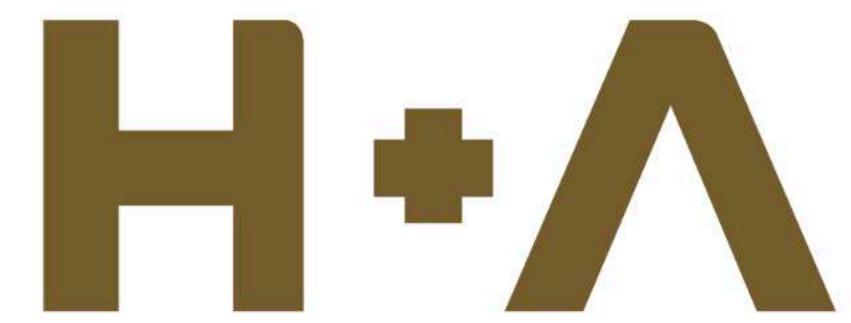


**In conclusion, the future of healthcare can be harnessed by savvy hospitality operators to diversify their offering, create a strong USP, a new loyal client base and an entirely new revenue stream.**

**By leveraging their existing assets, expertise, and customer base, hospitality operators can play a vital role in shaping the future of healthcare delivery.**

**Similarly, it can also be seen as an opportunity for healthcare providers to benefit from the infrastructure and established supply chain of hospitality brands, where the hospitality provider acts as a spoke for the ecosystem, while the healthcare continues to be the hub for acute cases.**

**Evolving these symbiotic partnerships could create a hybrid model that will ultimately benefit the wellbeing of our population**



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