



Psychological Well-being in Hospitality Report 2026

EHL HOSPITALITY BUSINESS SCHOOL

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Contributors and acknowledgements



Co-authors

Dr. Valentina Clergue
Nicola Gryczka Kirsch

We extend our deepest gratitude to all expert contributors and changemakers who are courageously advancing well-being across the industry. Your insights, dedication and pioneering work are shaping a more human-centered future. Your contributions not only elevate this report but also help translate vision into real, lived impact.

We are equally thankful to EHL for its continued leadership in driving this agenda forward, creating the space, research, and momentum needed to move well-being from concept to embedded practice.



Editor

Emma Näpänkangas

Experts

Adam D. Tihany

Founder at Tihany Design and Tihany Product Design



Christopher Cowdray

CEO at Dorchester Collection



Alessandra Patti

Professional Trainer & Consultant



Prof. Dr. Claudia M. Witt

Professor at University of Zurich



Alina M. Hernandez

Founder Wellness Innovation Hub



Daniel Nitu

General Manager at Forest Retreat & Spa



Dr. Alyson Meister

Dean of Degree Programs at IMD



Denise Bober

Chief Human Resources Officer at The Breakers Palm Beach



Anna Bjurstam

Wellness Pioneer & Senior Strategic Advisor



Dr. László Puczkó

CEO at HTWWLife



Anna Nash

President at Explora Journeys



Dr. Filippo Ongaro

Medical Doctor & Entrepreneur



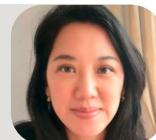
Antonio Ducceschi

CEO at Aptamind Partners



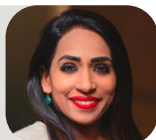
Dr. Joanna Blatter Minn

Mental Wellness Counsellor at EHL



Dr. Aradhana Khowala

CEO & Regenerative Tourism Expert



Dr. Natalie Grinvalds

Corporate Health & Wellbeing Manager at Applied Fitness Solutions



Arianna Proto

Luxury Hospitality Professional



Elisabetta Fabri

President & CEO at Starhotels Group



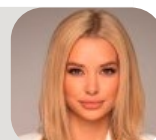
Chris Norton

CEO at Equinox Hotels



Elina Ivanova-Atanassov

Serial Entrepreneur



Christina Senn-Jakobsen

CEO at Swiss Food & Nutrition Valley



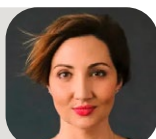
Erin Boyd Kappelhof

CEO at Eat Well Global



Christine R. Gould

Founder & CEO at GIGA



Gabriel Pitt

Digital Wellness Expert & Entrepreneur



Guilherme Hilsdorf
Entrepreneur & Investor



Satya Anand
Group President US, Canada and CALA
at Marriott International



Prof. Dr. Hellas Cena
Scientific Director at FFC and Professor
of Dietetics and Clinical Nutrition,
University of Pavia



Serena Cestra
Mindfulness Coach



Karen Guggenheim
CEO & Founder at WOHASU



Shoshana Weinberg
Longevity & Wellness Strategist
Scientific Research Manager at
Technogym



Lindsay Madden-Nadeau
Senior Director Wellness Strategy at Red
Sea Global



Sonal Uberoi
Founder & Wellness Director at Spa
Balance Consulting



Máira Delgado
Public Relations at IBITI Projeto



Sophie Egan
Founder at Full Table Solutions



Maria Haggo
Founder & CEO at Transform8



Stefani Bardin
Founder at unstuck: consultancy



Martin Goldmann
CEO at ASPA International



Susie Ellis
Co-founder, Chair & CEO at Global
Wellness Summit



Dr. Nele Dael
Research Fellow at IMD Business School



Vanessa Balouzet Uchanski
Chief Growth Officer at EHL



Olga Donica
Longevity Innovation Director at
CLINIQUE LA PRAIRIE



Vessela Toncheva-Schenk
General Manager at Blue Longevity
Clinic



Rainer Stampfer
President, Global Operations, Hotels and
Resorts at Four Seasons



Yasemin Oruc
Senior Lecturer Hospitality Marketing
& Innovation and Research Fellow City
Hospitality; President at EuroCHRIE



Rania Moualla
Founder and Chairman at ZADK



Willem van Emden
Managing Director at IMP Hospitality
Group



Rebecca Liu
Management Consultant at EHL China
Office



Message from the authors

When we launched the Well-being Report Series with our first edition on Food and Well-being in 2025, we explored how food has become more than a source of sustenance or pleasure and has turned into a vehicle for health, connection and purpose.

As we continue this journey, the focus now turns inward. The second edition of the Well-being in Hospitality Report invites industry leaders to look closer into the invisible dimensions of well-being, the mind. Today, conversations around mental health and psychological well-being are evolving and although challenges such as stress, burnout, and loneliness remain prominent in modern life, there is a growing recognition that well-being extends beyond the absence of illness. It encompasses how individuals feel, function, or even find meaning in their daily lives. In this context, travel is a driver of psychological well-being as it offers opportunities to step outside the daily routine, restore mental energy, create connections, and reconnect with our sense.

Hospitality has always been about creating feelings such as belonging and joy. And today, it must also protect those feelings, both for guests and for the people delivering them. Building on insights from academic research and drawing on

findings from industry interviews, this report explores the importance of integrating psychological well-being into organizational practices and guest experiences, not as a temporary response to market demand, but as a strategy for creating meaningful, long-term impact.

Our approach is grounded in the framework of positive psychology, encompassing both hedonia and eudaimonia. Hedonia reflects the emotional and sensory pleasures that hospitality can evoke such as comfort, joy, and relaxation. Eudaimonia extends further, embracing the pursuit of connection and purpose, the sense of fulfillment that arises when people feel seen, supported, and aligned with their values.

We hope the insights and examples in this report inspire reflection and action, encouraging you to cultivate psychological well-being not only for your guests, but also within your teams and communities. Together, we can advocate a hospitality culture that restores and motivates, one that reconnects with the very origins of hospitality itself (derived from *hospes*), rooted in care and protection of welcoming and looking after others.

Foreword



The mission of hospitality to create meaningful human experiences is one of the core reasons why I was drawn to this industry. At its best, hospitality contributes directly to our physical and mental well-being. It creates moments of connection and emotion that are rooted in something deeply human: the feeling of belonging and being seen.

This fundamental need explains behaviors we all recognize. Why do we still go to restaurants when virtually any cuisine can be delivered to our homes or hotel rooms? Why do so many of us prefer a spinning class in a gym over a screen and a bike at home? And most importantly, why do people with strong personal relationships consistently live longer and healthier lives? The answer is both simple and profound: people value social interaction. We need it.

Hospitality exists because humans are social beings. In an age marked by pervasive digital media use and increasing isolation, hospitality plays an essential counterbalancing role. It is, quite literally, an antidote to loneliness. By creating spaces for connection, recognition and shared experience, hospitality supports emotional resilience and mental health in ways that technology alone cannot replicate.

This second EHL Well being Report focuses on the well-being of the mind, while fully acknowledging that mind and body are inseparable. Our physiology constantly responds to our emotions. Our pulse rises

when we see someone we care about, our blood sugar and blood pressure react to stress, and we blush when we receive a compliment. Emotions shape the body, and the body, in turn, influences the mind. Understanding this interaction and translating it into healthier, more sustainable working environments has become one of the defining challenges of our time.

For organizations operating in high-performance cultures, including hospitality, the question is no longer whether employee well-being matters, but how it can be meaningfully improved without compromising excellence. Studying the interaction between mental well-being, performance and organizational culture is therefore not only socially relevant, but strategically essential.

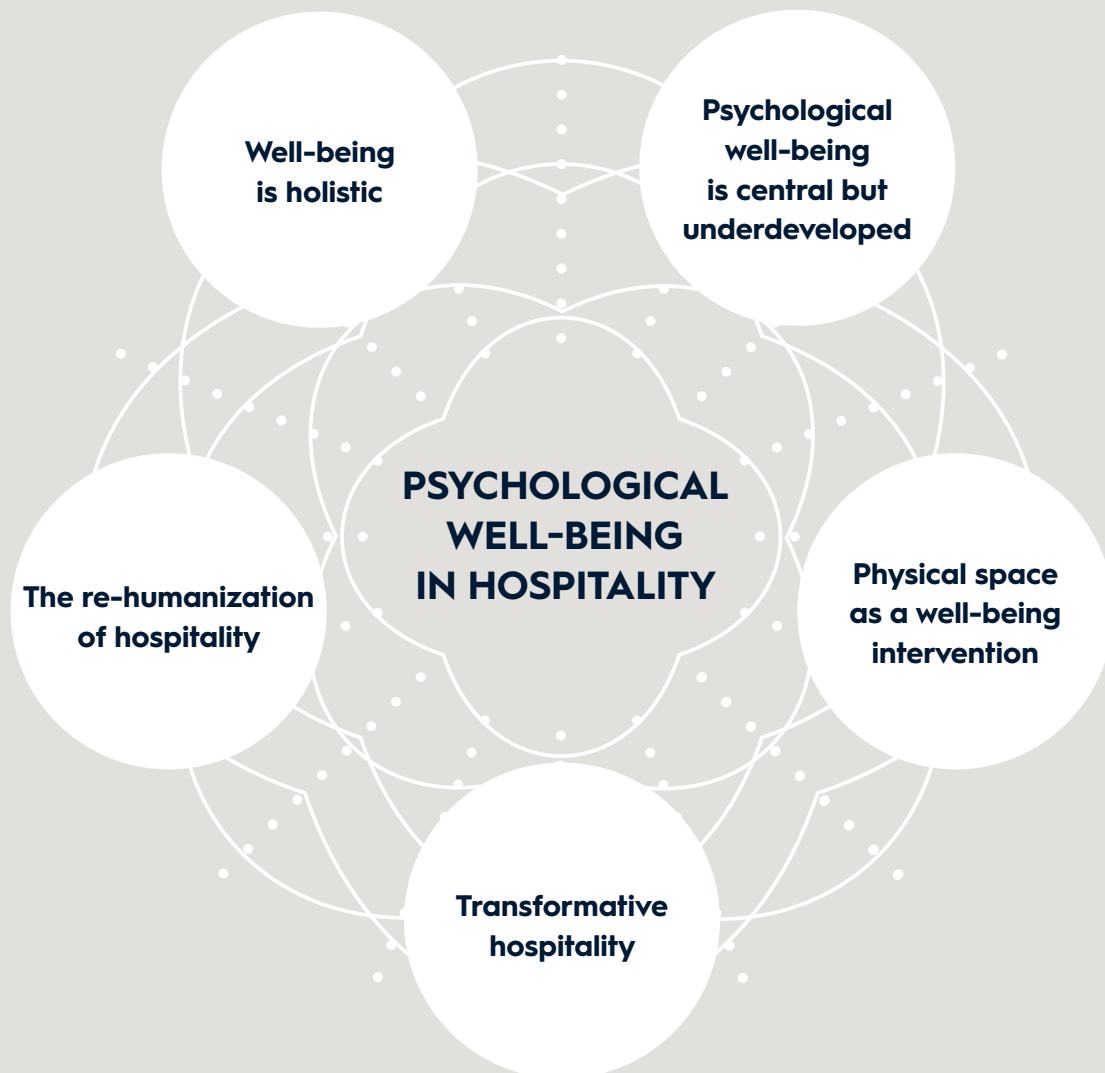
I would like to express my sincere gratitude to the co-authors, Valentina Clerque and Nicola Gryczka Kirsch, for their insightful work on this second well-being report. Their analysis offers valuable perspectives for hospitality professionals and students alike. My warm thanks also go to the 48 experts who shared their experience and knowledge, enriching this report with depth and real-world relevance.

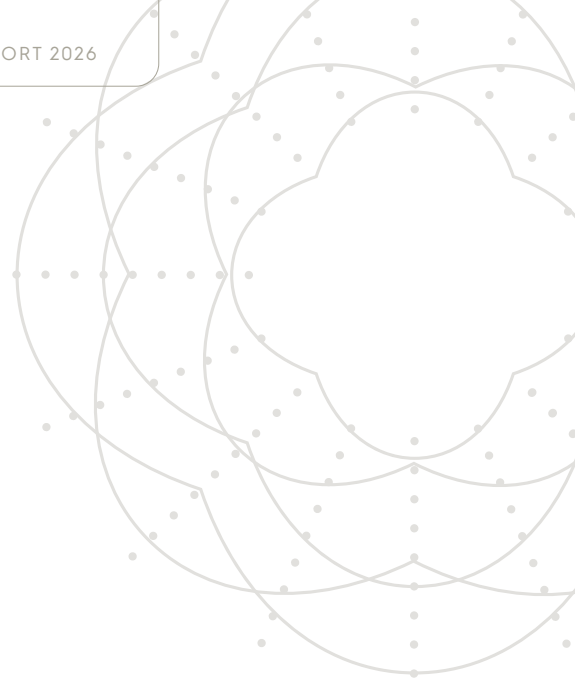
I hope this publication inspires reflection, dialogue and action, and reinforces hospitality's unique role in nurturing human connection and well-being in a rapidly changing world.

MARKUS VENZIN,
CHIEF EXECUTIVE OFFICER, EHL

Executive summary

The Psychological Well-being in Hospitality Report examines how the hospitality industry addresses and can better serve the psychological well-being of both guests and employees. Grounded in academic research and drawing on 48 in-depth expert interviews across academia, industry, and innovation, the report identifies five key developments in psychological well-being in hospitality today.





Five key developments

1. **Well-being is holistic:** Well-being cannot be reduced to a single dimension, as physical, mental, emotional, social, spiritual, and financial aspects are deeply interconnected. Imbalance in one area affects all others. The idea applies equally to guests and employees, though their specific needs differ significantly in practice. While well-being is understood holistically by most experts, practical implementations remain fragmented and typically address only one or two dimensions of well-being at a time.
2. **Psychological well-being is central but underdeveloped:** Despite being arguably the most consequential dimension of well-being for both guests and employees, psychological well-being is systematically under-addressed. The industry has invested heavily in visible wellness amenities while leaving the emotional design of guest journeys and the psychological safety of employees largely unattended.
3. **The re-humanization of hospitality:** Decades of standardization and operational efficiency have come at the cost of relational warmth, and guests are able to detect the difference between transactional and caring service. Furthermore, employee psychological well-being directly impacts the quality of the guest experience.
4. **Physical space as a well-being intervention:** Every design decision is also a well-being decision. Neuroscience and environmental psychology support the finding that hospitality spaces can restore on a deeper level, or conversely, be a source of stress.
5. **Transformative hospitality:** The efficiency oriented and homogenized model of hospitality is reaching its limits, as guests are seeking experiences that engage not only hedonic well-being (comfort, pleasure, and relaxation) but eudaimonic well-being (meaning, purpose, and transformation). The hospitality industry is uniquely positioned to facilitate transformation.

OPPORTUNITIES FOR STAKEHOLDERS:

- **Hospitality businesses:** Embed psychological well-being into organizational culture and experience and spatial design as a long-term strategic priority. Well-being as a mere marketing claim or a separate program may not be enough moving forward as guests seek continuity and authenticity.
- **Educators and researchers:** Integrate psychological well-being literacy, such as mental health first aid, emotional intelligence, and neuroarchitecture into hospitality curricula and future research agendas.
- **Policymakers and investors:** Recognize employee psychological well-being as a measurable business driver and create frameworks that hold operators accountable for the psychological conditions of their workforce.

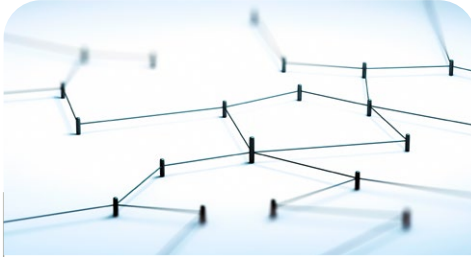
This report makes the case that the hospitality industry is uniquely positioned to become a force for psychological flourishing, both for the guests who pass through its doors and to the employees who bring it to life. With the gathered insights, hospitality leaders can navigate the topic of psychological well-being in hospitality with clarity and purpose and build organizations that restore their guests.



Glossary

- **Biophilic design:** An architectural approach that incorporates natural elements such as light, vegetation, materials, views, and organic forms into built environments to support psychological restoration and stress reduction.
- **Conscious consumers:** Individuals who prioritize products and services that promote sustainability, health, and social fairness, while expecting brands to demonstrate transparency, authenticity, and accountability.
- **Emotional exhaustion:** The depletion of an individual's emotional resources through sustained interpersonal demands, also recognized as the first stage of the burnout process.
- **Emotional labor:** The management and performance of emotional states for organizational purposes. A primary driver of psychological strain in service industries, including hospitality.
- **Eudaimonia:** The realization of one's purpose and potential, focusing on personal growth, meaning, and fulfillment. In this report, eudaimonic well-being refers to the dimension of well-being concerned with what is meaningful and lasting, as distinct from what is pleasurable in the moment.
- **Hedonia:** The experience of positive emotions associated with pleasure and the reduction of pain. Hedonic well-being encompasses comfort, enjoyment, and sensory satisfaction.
- **Hospitality industry:** A collection of businesses dedicated to offering services related to food and beverage, accommodation, and complementary services such as recreation and entertainment. In this report, the term encompasses hotels, restaurants, cafes, retreat centers, catering services, and related hospitality contexts.
- **Invisible well-being:** A term used in this report by Dr. Aradhana Khowala to describe the psychological dimensions of the guest and employee experience that are not captured by visible amenities, including emotional and psychological safety, and the quality of human interaction.
- **Life satisfaction:** The overall subjective perception of quality across different areas of life.
- **Neuroarchitecture:** An emerging interdisciplinary field that applies neuroscientific methods to the study of built environments, identifying how spatial variables produce measurable effects on brain activity, stress, and psychological well-being.
- **Psychological safety:** A shared belief within a team or organization that individuals can speak up, take risks, and be themselves without fear of punishment or humiliation.
- **Psychological well-being:** A state of psychological balance in which individuals can realize their potential, cope with normal life stressors, work productively, and contribute to their communities. In this report, it encompasses emotional and mental balance, resilient cognitive functioning, and a sense of purpose and connection.
- **ROX (Return on Experience):** A concept developed by Dr. László Puczkó describing the business value generated by guest well-being, positioning psychological experience as a measurable driver of loyalty, advocacy, and competitive differentiation.
- **Social well-being:** The interpersonal dimension of well-being that encompasses belonging, meaningful relationships, and community connection.
- **Sustainable development:** Meeting current needs while ensuring future generations can meet theirs.
- **Transformation economy:** An evolution of the experience economy in which consumers seek not merely memorable experiences but meaningful change in how they think, feel, or understand their lives.
- **Well-being:** A state of experiencing positive feelings and having a meaningful life by fulfilling one's potential. A multidimensional construct encompassing physical, psychological, and social aspects of human functioning.
- **Wellness:** The active pursuit of healthy habits and practices.
- **Wellness economy:** The global market of businesses that empower individuals to integrate wellness activities and lifestyles into everyday living, valued at \$6.8 trillion in 2024 (Global Wellness Institute, 2025).

Objectives and methodology



METHODOLOGY

This report is grounded in academic research and draws on 48 in-depth, semi-structured interviews and surveys with diverse experts in hospitality, well-being and neuroscience, secondary data analysis and a collection of case studies of pioneering hospitality companies. Experts were selected based on their thought leadership, diverse perspectives, geographic representation and a balanced mix of sectors, including academia, industry, and innovation leaders. This approach allows the report to provide diverse insights on psychological well-being in the hospitality industry by combining theoretical frameworks with practical, real-world examples.

This report identifies emerging best practices and highlights the evolving best practices and attitudes regarding both guest and employee psychological well-being in hospitality. While a literature review provides the theoretical grounding, the expert insights offer real-time perspectives on the key developments in the industry, and the global case studies showcase on-the-ground solutions and practices. Together, these varied viewpoints make the findings relevant and actionable, equipping industry stakeholders with credible and practical guidance to promote psychological well-being in the hospitality industry.



SCOPE

This report examines psychological well-being across the full breadth of the hospitality industry. As an evolution from the first edition of this series, the report adopts a dual lens of guest experience and the workforce that delivers it. Both perspectives are essential for an in-depth understanding of the topic.

The report is grounded in the framework of positive psychology and does not constitute a clinical study. Where mental health challenges such as burnout, anxiety, or chronic stress are discussed, they are examined through the lens of industry dynamics and organizational responsibility rather than diagnosis or treatment. It is also worth acknowledging that psychological well-being is largely influenced by systemic factors, such as socioeconomic inequality and structural power imbalances, that extend beyond the scope of any single report. However, these realities inform our findings without being their primary focus.

As this series continues to grow, we remain committed to broadening the scope of future editions and incorporating an ever-wider range of voices, geographies, and perspectives.



TARGET AUDIENCE AND OBJECTIVE

This report is written for hospitality industry leaders globally, whether that's operators, investors, educators, or policymakers, as well as well-being practitioners whose work intersects with hospitality. The content is designed to offer value regardless of role, segment, or geography.

The primary aim is to introduce five key developments in how the industry understands psychological well-being, and to make the case that attending to it is a strategic imperative with measurable consequences for guest experience, employee retention, and long-term business performance.

This is the second edition of EHL's Well-being Report Series. Where the first examined food's role in well-being, this edition turns to the psychological aspect of the human being. Future editions will continue to broaden the scope of the series across the full dimensions of human flourishing in hospitality.

Introduction

A few words on ‘well-being’

Well-being has been studied across disciplines, including philosophy, economics, public health, and psychology^[1]. Although definitions vary, there is consensus that well-being represents a multidimensional construct encompassing physical, psychological, and social aspects of human functioning^[2-5].

Within the field of psychology, well-being has traditionally been examined through complementary theoretical lenses. The hedonic perspective conceptualizes well-being as derived from positive emotions, pleasure, and comfort^[6-7]. Experiences that promote relaxation or generate enjoyment contribute to immediate improvements in hedonic well-being. However, research suggests that purely pleasure-oriented experiences often produce short-term effects, as positive emotional states tend to diminish once the stimulating activity ends^[8-9].

In contrast, the eudaimonic perspective focuses on meaning, personal growth, and the realization of one’s potential^[10-11]. Eudaimonic well-being is associated with purpose and positive relationships, contributing to sustained well-being. Rather than momentary happiness, it reflects a deeper sense of fulfilment and functioning.

Research increasingly highlights that hedonic and eudaimonic well-being are not competing outcomes but mutually reinforcing dimensions of human flourishing^[12]. Positive emotional experiences support engagement and motivation, while meaningful and growth-oriented experiences sustain long-term well-being.



The relevance of well-being extends across multiple life domains, influencing physical health, relationships, community engagement, and workplace performance^[13-14]. Although genetic predispositions contribute to baseline levels of well-being^[15-16], environmental and situational factors such as social relationships, organizational systems, learning opportunities, and physical health play an equally important role^[6, 14, 17]. Consequently, well-being is increasingly understood as dynamic rather than fixed, fluctuating over time and responsive to contextual influences^[13, 18].

This highlights the importance of creating supportive, connected environments. Policymakers increasingly recognize that prioritizing well-being is not simply a matter of individual responsibility but a societal necessity, essential for sustainable development and long-term health^[13].

Well-being and hospitality

In recent years, well-being has emerged as one of the most significant topics in multiple industries, including hospitality. The global wellness economy, valued at USD 5.6 trillion in 2022, is projected to reach nearly USD 9.75 trillion by 2029^[19]. This increase reflects a societal shift toward holistic living, where emotional, physical, and psychological balance are viewed as integral to quality of life. Younger generations, particularly Gen Z and Millennials, are leading this change by investing in health, fitness, mindfulness, and emotional well-being as lifestyle priorities^[20].

“
Hospitality is uniquely positioned to foster this growing pursuit of well-being
”

Hospitality is uniquely positioned to foster this growing pursuit of well-being. Travel and tourism inherently offer an opportunity to pause and recover from the fast-paced demands of everyday life, with well-being often cited as a primary motivation for travel^[21-23]. Each hospitality actor can play a vital role in this ecosystem, intentionally designing environments and experiences that promote connection and restoration^[24].

Academic research increasingly distinguishes between hedonic and eudaimonic well-being within hospitality contexts^[25-26]. Experiences that focus on sensory pleasure and indulgence such as spa treatments, culinary excellence, or luxury aesthetics, contribute primarily to hedonic well-being by evoking positive emotions^[25,27-28]. In contrast, activities involving learning, mindfulness, personal growth, or adventure nurture eudaimonic well-being, fostering a sense of achievement, purpose, and self-expansion^[29-31].

Empirical evidence demonstrates that enhancing guest well-being leads to a range of positive outcomes: increased satisfaction, stronger emotional connections with brands, and greater loyalty^[32-38]. Guests who experience well-being are not only more likely to revisit and recommend destinations, but also to associate those experiences with personal transformation^[39-40].

At the same time, the industry is recognizing the interdependence between guest and employee well-being. Frontline hospitality work often involves emotional labor and irregular hours, increasing the risk of burnout and stress^[41]. Therefore, cultivating well-being within organizations through mindfulness programs, supportive leadership, and balanced work design is becoming a strategic imperative.

Ultimately, well-being in hospitality is not merely about adding wellness amenities or services. It represents a strategic shift from delivering comfort to facilitating human flourishing. By integrating evidence-based practices from psychology, design, and management, the hospitality industry can move beyond transactional experiences to create encounters where guests and staff alike leave feeling restored and simply well.



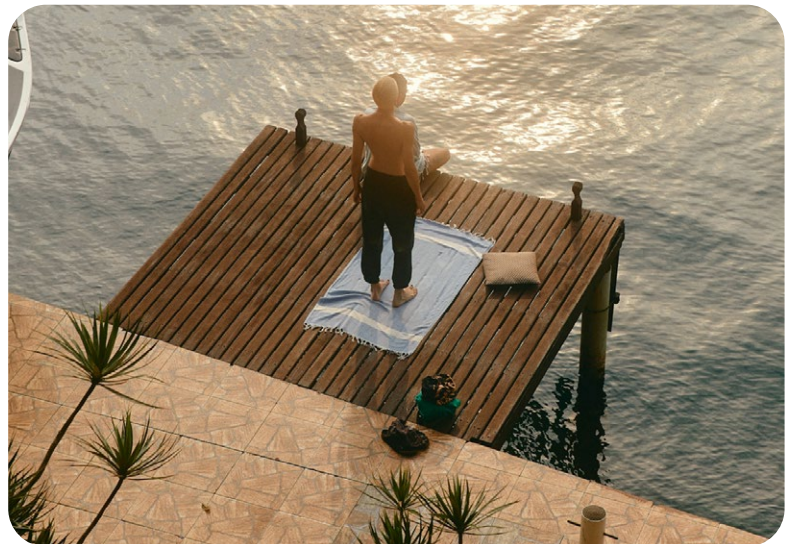
Psychological well-being and its application in hospitality

While overall well-being encompasses physical, emotional, and social dimensions, in this report psychological or mental well-being specifically refers to a state of psychological balance in which individuals can realize their potential, cope with normal life stressors, work productively, and contribute to their communities^[42]. Research from psychology and neuroscience provides substantial evidence that a state of psychological well-being is closely linked to biological, cognitive, and environmental factors^[43]. Contemporary clinical perspectives emphasize that psychological well-being cannot be reduced to emotion alone; it reflects the dynamic interaction between cognitive resilience (clarity, executive functioning, performance) and emotional resilience (stress regulation, adaptive coping), grounded in a reciprocal mind-body relationship^[44].

According to the Broaden-and-Build Theory, positive emotions broaden cognitive processes and build enduring personal resources^[45]. These emotions enhance problem-solving, social connectedness, and physical health. Neurobiological studies further show that practices supporting psychological well-being, such as mindfulness meditation, gratitude, and cognitive reappraisal, induce measurable changes in brain structures associated with emotional regulation and stress reduction, including the prefrontal cortex and amygdala^[46-47]. Moreover, higher psychological well-being predicts reduced inflammatory responses, improved cardiovascular health, and enhanced immune functioning^[48-49], illustrating that the mind-body connection is essential for human flourishing.

Emerging clinical models further structure this connection through interconnected “hallmarks” of mental health, positioning sleep and social connection as foundational regulators, supported by gut health, stress management, immune and cardiovascular function, and inflammation control, with positive emotion and cognitive performance as higher-order outcomes^[44]. This framework highlights that disruptions

at the biological level (e.g., chronic inflammation, poor sleep architecture, dysregulated stress response) directly influence psychological functioning. For example, deep sleep activates the glymphatic system, enabling neurological detoxification; insufficient deep sleep impairs cognitive clarity and emotional balance. Likewise, gut microbiome composition influences inflammatory pathways and neurotransmitter activity, affecting stress resilience and vulnerability to anxiety or depression^[44].



Beyond individual traits, environmental and social factors strongly influence psychological well-being. This insight reinforces the strategic relevance of hospitality environments as spaces capable of shaping behavioral patterns, emotional states, and recovery processes. For example, exposure to nature reduces stress and restores attention^[50-51], while social connectedness and belonging improve psychological health^[52]. Contemporary insights show that natural environments, earthy color palettes, and immersive outdoor experiences stimulate neurological pathways associated with emotional resilience^[44]. The design of built environments, the quality of social interactions, and organizational culture, therefore shape individuals’ emotional balance and stress regulation^[53-54]. Within this context, concepts such as emotional

agility^[55], breathwork and autonomic nervous system balance, biophilic design, vagus nerve regulation^[44], and socio-cognitive mindfulness^[56] provide evidence-based tools for strengthening psychological resilience in both individuals and groups.

Hospitality environments and experiences can thus function as therapeutic ecosystems that promote psychological restoration. Tourism and travel often evoke positive emotions, engagement, and meaning^[57-58], which restore psychological well-being. Activities such as mindfulness retreats, nature immersion, spa and wellness programs, and social dining stimulate emotional regulation and relaxation responses^[3], 59]. The act of travel itself allows psychological detachment from everyday stressors and habitual cognitive patterns, providing cognitive restoration^[41, 60].



Importantly, research and clinical practice indicate that environmental interventions such as circadian-aligned lighting, reduction of evening blue light exposure, sleep-supportive room design, structured breathwork sessions, meditation programs, and evidence-based sound or vibration therapies can contribute to measurable mental health outcomes^[44]. Structured mindfulness-based interventions (MBIs) and positive psychology programs have demonstrated benefits for both hospitality guests and employees. MBIs improve emotional regulation, empathy, and service quality among staff, while enhancing guests' perceptions of calm and satisfaction^[61-62]. Embedding socio-cognitive mindfulness, defined as active, context-

sensitive awareness^[56], promotes creativity, attentiveness, and emotional regulation.

From an organizational standpoint, employee psychological well-being is increasingly recognized as a strategic business priority. Frontline service workers (FLSWs) face high exposure to stress, long hours, and emotional labor, contributing to anxiety, burnout, and job dissatisfaction^[63]. Gender disparities present additional challenges, with female employees experiencing higher rates of anxiety and social dysfunction^[64]. The introduction of artificial intelligence (AI) and automation, despite its potential to support work, adds stressors related to job insecurity and role ambiguity^[65]. Excessive digital connectivity contributes to technostress and cognitive overload, reinforcing the need to design digital interfaces and guest journeys that foster positive emotions, engagement, relationships, meaning, and accomplishment (PERMA) rather than constant stimulation^[26].

At the organizational level, cultures that actively support psychological well-being demonstrate higher engagement, lower turnover, and after all improved guest satisfaction^[66-67]. Integrating evidence-based approaches such as sleep optimization, stress regulation practices, nature immersion, and psychologically informed leadership positions hospitality not merely as service delivery but as a preventive care opportunity.

In this sense, the hospitality sector faces a dual responsibility: to nurture the psychological well-being of its workforce and to offer environments that restore and/or elevate the psychological well-being of guests. As burnout and anxiety continue to rise, the industry's opportunity lies in providing an ecosystem of care, a space where physiological and emotional regulation and human connection are embedded into the guest and employee experience.

key KEY DEVELOPMENTS

developments

In the context of this report, key developments are the emerging patterns in how psychological well-being is understood in the hospitality industry.

The five identified developments have been derived from data, clinical evidence, and the lived experience of hospitality leaders who are at the forefront of the industry's well-being practices. The interview analysis revealed sub-topics leading to the creation of distinct subsections within each key insight.

1

Well-being is holistic: beyond body, beyond mind

Well-being now occupies a central place in contemporary life, accompanied by the rise of an extensive economy dedicated to optimization. Offerings such as detox solutions, mindfulness apps, and health tracker wearables have wildly proliferated, all claiming to support well-being. While these new entrants have brought awareness to different dimensions of health, there is a growing risk that well-being in essence is becoming confused with a packaged product.

What interviewees in this report consistently convey is that well-being is irreducible to a single dimension, whether that would be a fitness metric or a specific amenity, say, a gym. Instead, it is a multidimensional state of human functioning in which physical, mental, emotional, social, spiritual, and financial aspects are deeply interconnected

in a way where imbalance in one area has an impact on the others. This holistic understanding implies, for instance, that the working conditions in the hospitality industry or its conceived responsibilities towards guests and have direct consequences on the produced experience.

Psychological well-being, the focus of this report, is here conceptualized as encompassing emotional and mental balance and resilient cognitive functioning, all underscored by a sense of purpose and connection. All these dimensions are inseparable from physical health and are moreover fundamentally influenced by the social environment. As the following research demonstrates, this definition applies with equal force to guests experiencing hospitality and the employees delivering it.

“

People can get stressed from self-optimization. We want to balance our mind and body to reduce chronic stress – and then to self-optimize becomes a contradiction in terms.

”

Prof. Dr. Claudia Witt, Professor, University of Zürich



The philosophical roots of holistic well-being

The idea that human flourishing cannot be reduced to a single dimension is not new; in fact, it is one of the most sustained ideas in the millennia of philosophical canon. Aristotle, writing in the *Nicomachean Ethics* more than two thousand years ago, identified eudaimonia as the highest human good, and defined it as “activity of the soul in accord with virtue”^[68]. Not a feeling or a state of pleasure per se, eudaimonia is an active, ongoing condition that arises from the full exercise of the human capacities of reason, virtue, social connection, and purpose. Importantly, Aristotle further acknowledged that inner character on its own is not sufficient, but that the external conditions of material sufficiency and health play an important role.

Although these ideas are ancient, they align with contemporary well-being science, particularly the hedonic and eudaimonic views of well-being. The former defines well-being in terms of pleasure and life satisfaction^[6-7], while the latter understands meaning, purpose, and personal growth, with the ultimatum of the full realization of one’s potential as the pinnacle of well-being^[7, 11].

Research demonstrates that these two traditions are not competing alternatives but, rather, mutually reinforcing dimensions

of a single whole, where positive emotional experiences support engagement and motivation, and vice-versa^[69].

More recently, social well-being (encompassing social acceptance, contribution, coherence, and integration) has been added to this picture as a third distinct dimension, adding an interpersonal layer to the eudaimonic tradition^[70]. The World Health Organization’s foundational definition captures all three, with health defined as “a state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity”^[71]. Well-being is therefore, in both its ancient philosophical and contemporary formulations, conceived of as plural.

The aforementioned traditions are now seen as complementary of each other in contemporary well-being science. Well-being is a dynamic, almost living and breathing system that is built on the interconnectedness of multiple dimensions, combining hedonic, eudaimonic, and social considerations. This reinforces the need to move beyond fragmented approaches and toward more integrated ways of designing experiences and environments.



Tsao Pao Chee (TPC) is a fourth-generation family business that has evolved from a trading company into a purpose-led well-being ecosystem with its headquarters in Singapore. TPC’s hospitality expression SANGHA Retreat by OCTAVE is a mindfulness community with properties in Suzhou, Japan, and Thailand that is built around the integration of Eastern wisdom and Western science where well-being is approached with continuity. The retreat structures its entire guest journey around eight living habits: eating, breathing, sleeping, movement, stillness, worldview, the middle way, and celebration of life. Each habit is approached as a contemplative practice, and space design, programming, diet, and daily rhythm are all oriented around fostering what TPC describes as harmonious relationships with oneself, others, and nature.

Interconnected dimensions of well-being

Although the backgrounds and professional roles of this report's interviewees vary to a great capacity, the findings largely affirm the previously outlined academic consensus.

Dr. Alyson Meister, Dean of Degree Programs at IMD Business School states that it is impossible to "separate mental from the body. At its core, I would say it's emotional functioning, cognitive functioning, it's physical functioning, it's social, it's spiritual. So, [well-being] is quite holistic."

Physical well-being, at its simplest referenced as the body's energy and resilience, is the most familiar terrain for hospitality. Fitness and spa facilities are already baseline expectations, while many properties are now further expanding

into sleep and nutrition programming. Yet, leaving the psychological dimension systematically unexamined, as it has largely been so far, would be to do a disservice to the industry. Research done in neurobiology shows that chronic psychological stress is associated with elevated inflammatory markers and impaired immune functioning^[46, 49].

According to Dr. Filippo Ongaro, Medical Doctor and Entrepreneur, "psychological well-being is at the center of the whole discussion around well-being and longevity. The real reason people don't make healthy choices isn't that they don't know what to do; it's psychological."





Food is in and of itself a holistic well-being topic, simultaneously a human physiological necessity and a sensory experience, while also being important from a social ritual standpoint. The act of eating can offer connection with fellow human beings and become much more significant than refueling. In fact, food can be a vehicle for psychological well-being in hospitality.

"The relationship between food and mental wellbeing is both biological and experiential," states Prof. Dr. Hellas Cena, who is the Scientific Director at FFC. "Nutrition influences brain function and stress response, while the way food is experienced, including its quality, cultural meaning, and social context, shapes emotions, memory, and satisfaction." Christina Senn-Jakobsen, the CEO of the Swiss Food and Nutrition Valley echoes the profound, even "magical" effect food can have: "in prisons they practice serving fatty salmon and blueberries and dark chocolate – all these things that actually make you think more positive and feel

more positive about yourself in the world."

There is also more awareness about how nutrition links to psychological well-being. According to Sophie Egan, author and founder of Full Table Solutions, "consumers are increasingly seeking out foods that support mental health in addition to physical health." Christine R. Gould, founder and CEO of GIGA, attributes the increased understanding largely to digital technologies. "People are moving beyond some of the things that consumers of yesteryear were thinking about, such as price and convenience, and thinking about broader topics like health and well-being".

The intersection of food, culture, and psychological well-being was explored in depth in Food and Well-Being Trend Report, the first part of EHL Group's well-being report series. Read the report here: [EHL Food and Well-being Trend Report](#).

“
Food is more than nourishment – it is the language of hospitality, a bridge between culture and well-being where memory, identity, and human connection come together at the table.
”

Rania Moualla, Founder and Chairman, ZADK Saudi Culinary Arts Academy.

Social well-being emerges as another particularly significant dimension in hospitality contexts, for guests and employees alike. Hospitality Strategist and HTWWLife CEO Dr. László Puczkó observes that for hotel employees working in close-knit operational teams around the clock, the quality of relationships with colleagues at every organizational level is the basis for daily psychological functioning. For guests, on the other hand, who are often travelling away from their communities and routines, the quality of human contact during a stay can be a meaningful well-being outcome in and of itself.

Spiritual well-being is also increasingly present in the conversation, even if it is possibly the dimension that is most difficult for hospitality to operationalize. Anna Bjurstam, Wellness Pioneer and Senior Strategic Advisor with 35 years in the industry, thinks that *“even if you have the best biomarkers and you eat well and you train well and you sleep well; unless you have a spiritual well-being, you can’t just treat our chronic diseases through healthcare or wellness. It’s a combined approach.”* A McKinsey analysis further shows that the purpose and meaning associated with spiritual well-being are structurally connected to health outcomes (more on transformative hospitality in key development 5)^[72].

The consumer demand for a more holistic approach to well-being is only growing. According to entrepreneur and investor Guilherme Hilsdorf, *“it’s a side effect of our lifestyle and the way we develop disease”*. Mental wellness has been the second fastest growing segment of the global wellness economy driven by rising chronic disease, widespread mental unwellness, and a generational shift toward prevention. The global wellness economy reached \$6.8 trillion in 2024 and continues to grow faster than the global GDP^[19].



“
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”

Anna Bjurstam, Wellness Pioneer and
Senior Strategic Advisor

Well-being across cultures

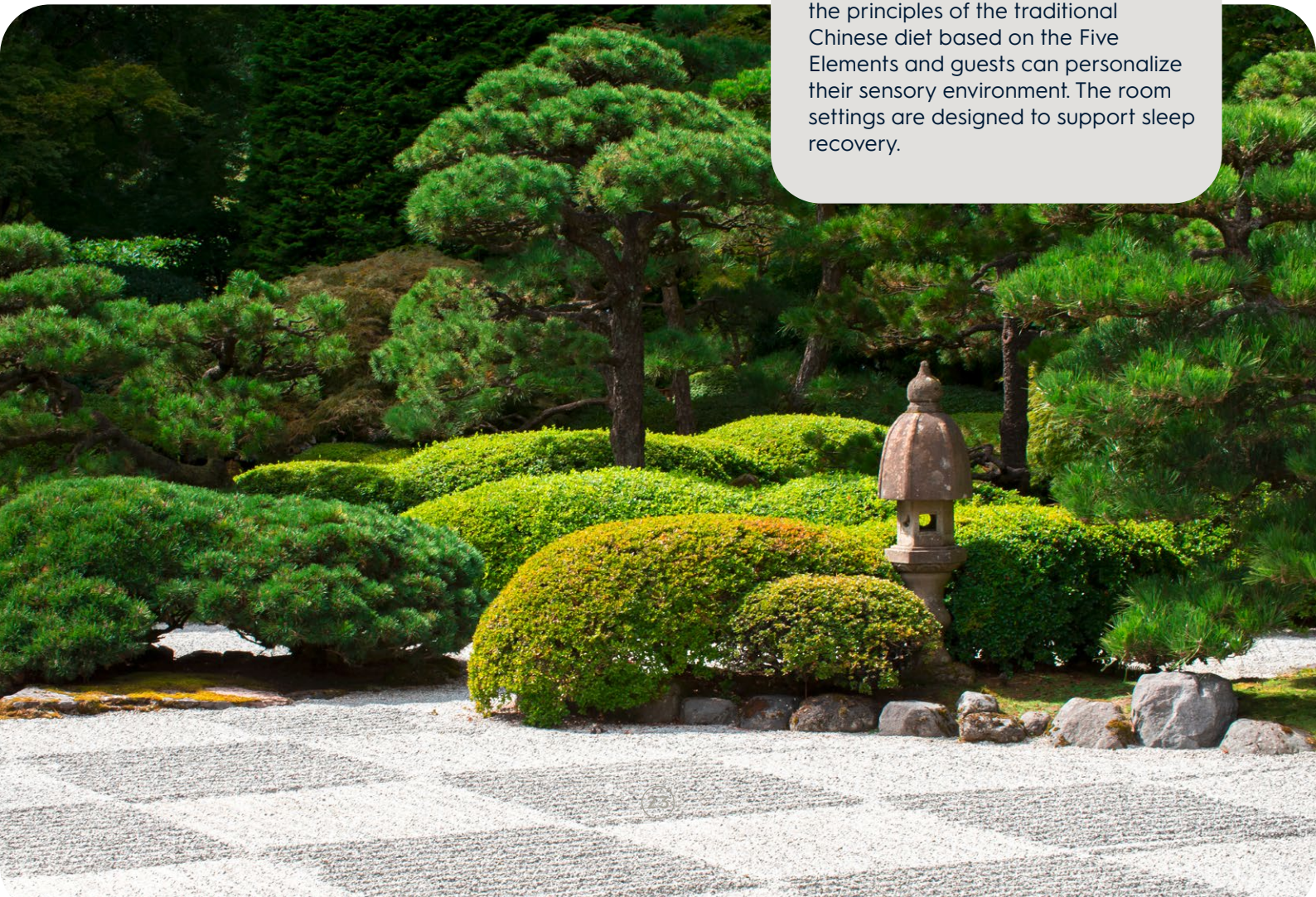
A comprehensive understanding of the topic requires acknowledging that well-being is not a culturally neutral construct, and that many prevailing conceptualizations originate within Western academic traditions. Nevertheless, experiences of psychological ease and restoration may take markedly different forms across cultural contexts. As the hospitality industry increasingly serves and employs individuals from diverse backgrounds, adherence to a singular conception of well-being risks becoming exclusionary.

“From the Chinese theory, we have the yin and the yang, and balance is always part of our culture. Balance means that you can balance your stress and your life, in a peaceful way. That’s well-being,” explains EHL Management Consultant Rebecca Liu. According to Liu, her parents’ generation that was shaped by scarcity and collective sacrifice, understood well-being as achievement and providing for others.

Younger and more globally connected Chinese professionals, on the other hand, increasingly see well-being as a function of inner peace.

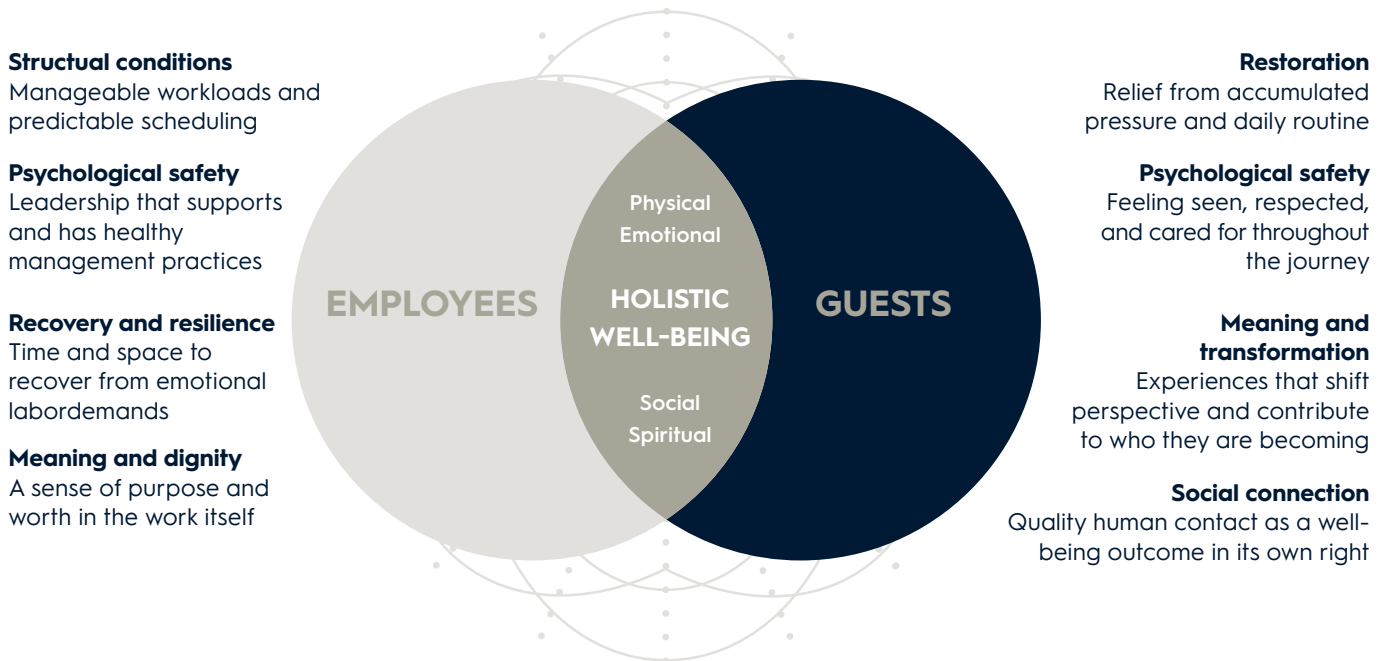
Our cultural background shapes not only definitions of well-being but also how we engage with well-being practices, with significant variation across East Asian, Western, and collectivist versus individualist contexts^[73]. A well-being framework that does not accommodate cultural plurality is a framework for just one kind of person in one kind of environment and situation.

SAVHE is a premium Chinese lifestyle hotel brand launched in October 2024 by Atour Group. The name derives from the Lisu language of Yunnan Province, where it means “breath”. The brand’s design philosophy is centered around Eastern wellness and restoration in relation to the environment. Meals at SAVHE follow the principles of the traditional Chinese diet based on the Five Elements and guests can personalize their sensory environment. The room settings are designed to support sleep recovery.



A shared foundation, different manifestations

A central finding of this report is that the holistic understanding of well-being applies equally to guests and employees, but naturally, the needs of the two are different in the practical sense situation.



For guests, holistic psychological well-being in a hospitality context tends to center on restoration, ease, and the temporary relief of accumulated pressure. Arianna Proto, Luxury Hospitality Professional, describes the guest's fundamental need as *"feeling well respected, feeling safe and psychologically supported through the whole journey – this notion of safety, respect, and care."*

Anna Nash, President of Explora Journeys, describes how the natural rhythm of ocean travel with its uninterrupted horizon and distance from daily routine can create psychological decompression that could not be replicated by any dedicated programme. Nash argues that well-being *"is not simply a service or a programme. It is a philosophy that shapes how spaces are designed, how experiences unfold, and how people interact with one another."* Travel and hospitality experiences are, in fact, associated with enhanced mental well-being through mechanisms including psychological detachment from habitual stressors, positive emotional engagement, and the activation of meaning and personal growth^[57].

For employees, well-being in the industry is defined by the structural conditions of hospitality work, much of which is constituted of emotional labor. First theorized by Hochschild^[74], emotional labor refers to the management and performance of emotional

states for organizational purposes, and it has been identified as the primary driver of psychological strain in service industries. In hospitality specifically, frontline employees must display positive emotions consistently regardless of how they feel on the inside and interact with demanding or difficult guests, even with irregular work shifts or in periods of heightened pressure^[75-76].

The consequence of this is emotional exhaustion. According to Dr. Nele Dael, Research Fellow at IMD Business School, people who work jobs that require a lot of emotional regulation are at an especially high risk. Emotional exhaustion, defined by Maslach and Jackson as the depletion of an individual's emotional resources through sustained interpersonal demands, is recognized as the first stage of the burnout process^[77]. Interestingly, burnout itself is characterized by how holistic it is, as it is not a purely psychological, nor physical, nor social phenomenon, but emerges from the imbalance of all three without sufficient recovery.

"Well-being is a whole person commitment – mental, emotional, spiritual, physical, financial, and social. And it's not about a programme. This is about weaving well-being into our DNA." – Denise Bober, Chief Human Resources Officer, The Breakers Palm Beach.



The **Breakers Palm Beach** is a fourth-generation family-owned luxury resort in Palm Beach, Florida, with over 130 years of operation and a team of 2,500 employees. Since 2000, when a board member and later chairman first challenged the organization to transform its culture, The Breakers has built one of the most comprehensive employee psychological well-being models in the hospitality industry that has taken more than two decades of deliberate, long-term investment to reach its current form.

The platform at the heart of this culture is called Well Beyond, which was launched around 2018, and it supports seven dimensions of employee health: education and training, financial well-being, insurance, mental health, nutrition and movement, preventative care, and work-life

resources. The psychological resources of Well Beyond are notable for their accessibility, as the property has an on-site mental health counsellor and a Teladoc service that are both available free of charge. Furthermore, appointments can be taken on the clock, which means that employees are paid for the time they spend in them, which removes the financial and logistical barriers that typically suppress the uptake of such initiatives.

The program is complemented by Blue EQ which is the property's mandatory emotional intelligence training and mental health first aid training for all managers. Bober notes that managers arrived at the first mental health training sessions with some apprehension, but that the response has ultimately been relief and engagement following

the normalization of previously suppressed topics.

Employee well-being at the Breakers is holistic, and other available services include vision care, mammograms, dental, dermatology, and biometric screenings, as well as a dedicated parent employee resource group. Most recently, The Breakers launched a comprehensive perimenopause and menopause training programme that was attended by hundreds of team members across all ages and ethnicities, some of whom also brought their partners.

The Breakers has a 93% retention rate among salaried staff, a 98% employee survey participation rate, and a 94% Great Place to Work score compared to the country's national average of 57%.

The cost of partial approaches

Although research findings indicate that well-being is widely understood as a holistic and multidimensional construct, practical implementations remain fragmented and typically address only one or two dimensions at a time.

Dr. Natalie Grinvalds, Corporate Health and Wellbeing Manager at Applied Fitness Solutions, argues that for employees, the focus is still largely on individual-level solutions such as support services, but structural change in terms of realistic workloads or the capabilities of leadership to support staff well-being in everyday management is oftentimes lacking. *“Without these foundations, well-being initiatives tend to have limited impact.”*

Furthermore, as well-being is a dynamic and context-sensitive condition [13, 78], it requires that the environmental and relational conditions that support psychological well-being are sustainable and continuous. While creating these conditions is no easy feat, hospitality is uniquely positioned in that it can have widespread impact across the millions of guests and workers it touches every year.

“*A meditation app on the television, a pillow menu, and access to a fitness center are additions to an otherwise transactional experience. They do not constitute a well-being strategy.*”

Elina Ivanova-Atanasov, Entrepreneur

INDUSTRY RECOMMENDATIONS



Adopt a holistic well-being framework

explicitly address different dimensions of guest and employee well-being, whether physical, mental, emotional, social, spiritual, or (where relevant) financial.



Back well-being design with cultural intelligence

different cultures have their own understandings of what constitutes balance and psychological ease. Investing in understanding the diverse backgrounds of both guest and employee populations ensures that well-being frameworks are effective and inclusive.



Distinguish between guest and employee needs

every person has the same dimensions of well-being, but the experience of these dimensions is personal and context dependent. Both guests and employees should be met with design and infrastructure that support their well-being.



Measure well-being indicators

measuring the net promoter score (NPS) is a good way to gauge employee and guest psychological safety. Score progress should be tracked over time to create accountability, and low scores should be addressed to uncover underlying roots of emotional exhaustion.

2

Psychological well-being is central but underdeveloped

As conceptions of well-being have increasingly adopted a holistic and multidimensional perspective, psychological well-being, arguably the most consequential dimension for both guests and employees, remains the least systematically addressed.

This predicament is paradoxical, considering that hospitality is by its nature a deeply psychological business, where very interaction and environment either support or erodes the psychological

functioning of the people inside it. Yet, industry investment is overwhelmingly focused on the physical and visible, which leaves what Dr. Aradhana Khowala calls invisible well-being underdeveloped.

Invisible well-being encompasses the emotional design of guest journeys as well as the psychological safety and recovery infrastructure of employees. Understanding why the area is overlooked and how we can address it moving forward is one of the most important questions this report attempts to answer.

“*Psychological well-being is not an addition to the experience – it is the experience.*”

Elisabetta Fabri, President and CEO of Starhotels Group.

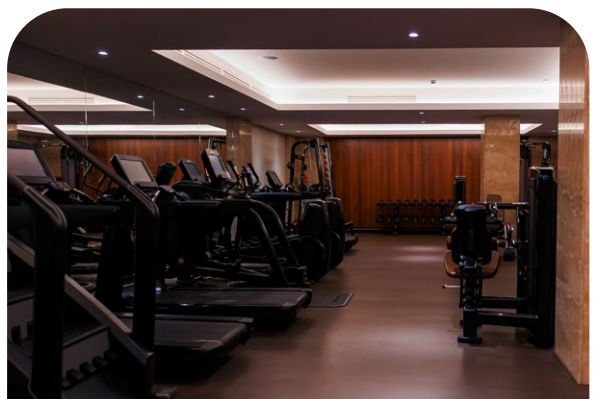
The inflation of the term ‘well-being’

One reason the gap in addressing psychological well-being remains particularly difficult to bridge is that the language surrounding it has expanded to the point of conceptual dilution. Well-being has become a highly fashionable topic, and it may appear that nearly all actors are investing in or promoting some form of well-being; however, this proliferation has also contributed to conceptual ambiguity and confusion.

When the term well-being is used no matter the context, equally applied to a spa menu and a mental health awareness day, the term loses its authority. This ambiguity allows organizations to claim that they are committed to well-being while being able to completely undermine psychological health. Antonio Ducceschi, CEO of GB Thermae Hotels, identifies the same problem from opposite directions: well-being has been treated, for many organizations, as “a marketing strategy rather than a philosophy.”

Alessandra Patti, Marketing Strategy Consultant, notes that this inflation also generates skepticism towards well-being. Employees and guests who have watched organizations treat sustainability, diversity, and well-being as successive branding cycles in congruence with investors focus on the topics are, understandably, wary.

When numerous practices become fashionable and are treated by organizations as items on a checklist, the result is an environment in which well-being appears ubiquitous and sustained, and substantive attention to psychological well-being remains scarce.



Visible wellness, invisible well-being

Our analysis revealed that there is a consistent gap between what the hospitality industry has invested in (the visible), and what supports psychological functioning (the invisible). This distinction also closely follows the hedonic/eudaimonic framework introduced earlier in this report.

Physical amenities such as fitness centers and sleep technology directly target hedonic well-being by producing pleasure and reducing discomfort. However, eudaimonic well-being, which is tied to meaning, purpose, and autonomy, does not come from the presence of any single amenity. Psychological safety and a sense of flourishing require sustained environmental conditions and organizational design that are easily overlooked due to their complexity.

According to Alina M. Hernandez, Founder of Wellness Innovation Hub, *“the industry has invested in hardware – the beautiful gym, the treatment room. But the employee is the operating system that determines the quality of the guest experience.”* If this essential operating system is under sustained psychological strain and left to its own devices in terms of recovery and support, there is no layer of amenities that can compensate for it. *“Guests remember the atmosphere,” Khowala notes, “and atmosphere is created by psychologically regulated human beings.”*

The hospitality industry has made significant progress in recent years, particularly in areas such as physical wellness, personalization, and wellness-oriented services. However, psychological well-being is still often approached indirectly rather than as a central strategic objective.



The structural conditions of employee well-being in hospitality

For employees, Dr. Natalie Grinvalds who is an expert in workplace well-being and population health, summarizes the state-of-play in the following way: *“The current state of employee mental well-being in hospitality is, for most organizations, one of neglect dressed in the language of care. While there are wellness programs, employee assistance schemes, mental health awareness days, these remain largely cosmetic, checkbox responses to what is, in many workplaces, a structural problem.”*

The structural problem she identifies includes chronic understaffing, unpredictable scheduling, high emotional labor demands, low agency, and a cultural normalization of hardship as professional identity. Dr. Alyson Meister identifies what she calls the “badge of honor” culture, which is the persistent myth that hospitality *“has to be grueling and tough and long hours”*, as one of the primary mechanisms by which psychological strain is suppressed rather than addressed. *“It’s just a culture that has to shift.”*

Badge of honor culture has its roots in the early 1900s, when French chef Auguste Escoffier modeled his professional kitchen organization on the military and created a strict hierarchical ranking system where obedience and the capacity to endure pressure were seen as fundamental values.

Escoffier’s kitchen brigade system has in many ways become the global standard of professional kitchens, but its woes have lately been apparent in media. The outbreak of controversy at Noma^[93] led to a flood of apologists excusing the abusive practices that had taken place at the restaurant in the name of excellence. Only now is the industry beginning to seriously interrogate this inheritance.

Dr. Joanna Blatter Minn, mental wellness counsellor at EHL, underscores the importance of the hospitality industry to ensure that employees have a psychologically safe work environment. *“Unfortunately, roughly 47% to 90% of workers have experienced some form of harassment, frequently involving customers and managers. Trends show high rates of verbal/physical abuse, particularly among young, female, and precarious staff, often driven by a culture that prioritizes customer service over staff safety.”*

“
The industry still faces a gap between awareness and consistent practice. Too often, well-being is treated as a program rather than a cultural and leadership responsibility embedded in everyday behavior.
”

Serena Cestra, Mindfulness Coach

The industry that positions itself as a facilitator of human restoration and well-being is, for many of its own workers, a source of psychological depletion. *“The people who work in hospitality and are meant to support and serve their guests are themselves burned out, undervalued, and often psychologically unprotected,”* Natalie Grinvalds states.

Why psychological well-being is the next frontier

The underdevelopment of psychological well-being in the hospitality industry is not permanent, as there are several forces that are pushing towards structural change. Particularly following the COVID-19 pandemic, as guests and employees alike were exposed to psychological strain, the importance of psychological well-being gained broader societal recognition.

This change is also apparent in generational expectations, with younger employees being less willing to accept subpar working conditions that erode psychological health[79]. Similarly, younger guests are more likely to evaluate hospitality experiences through an emotional and psychological lens[80].

Chair and CEO of Global Wellness Summit Susie Ellis sees psychological well-being as a topic that *“has grown tremendously, as our research clearly shows the increasing importance of this dimension”*. The GWI values the global wellness economy at over \$6.3 trillion, but perhaps the most important figure, as Khowala observes, is not market size, but the *“productivity, retention, trust, and customer experience”* in the hospitality industry.

If the hospitality industry continues to only invest in visible amenities while not considering the psychological layer, it will continue to produce experiences that bear the resemblance of care from the outside but fall short of providing the conditions of psychological well-being for guests and employees in practice.

INDUSTRY RECOMMENDATIONS



Define before you claim

Establish clear internal definitions that distinguish between physical wellness, psychological well-being, and mental health to remove ambiguity and hold accountability for commitments tied to each.



Audit the invisible

Audit the psychological conditions of the working and guest environment, such as the emotional safety of staff, the cognitive friction in the guest journey, and the quality of leadership empathy.



Treat skepticism as data

When employees or guests respond to well-being claims with skepticism, this is diagnostic information which shows that there is a gap between language and lived experience that requires structural response.



Commit to the long arc

A meaningful psychological well-being culture is something that is built systematically over the years. Organizations that begin with these structural changes now will be measurably ahead within a decade.

3

The re-humanization of hospitality: from transaction to care

Over recent decades, economies of scale have largely shaped the hospitality industry, directing attention toward operational optimization through standardized service protocols and technology-driven efficiencies. While processes of automation and standardization have contributed significantly to industry growth, particularly among the largest global hotel corporations, the emphasis on efficiency has increasingly come to outweigh considerations of human warmth and relational service.

This moment thus represents a period of course correction. According to Skift, more than 70% of travelers prioritize authentic experiences^[92]. Authenticity is not determined by whether a property operates independently or as part of a brand, but rather, it can come from the recognition of hospitality as fundamentally being a human exchange. *“Under strain, hospitality becomes highly transactional,”* says Yasemin Oruc, President at EuroCHRIE. *“Under well-being it becomes welcome and caring – being in the real moment”.*

“
*Guests are not just arriving with tight shoulders,
they are arriving with tight lives – looking for
a safe space to land, rejuvenate, and return to
feeling themselves again.*
”

Christopher Cowdray, CEO, The Dorchester Collection



The etymology of care

The word 'hospitality' itself comes from millennia of human tradition. As Maria Haggo, Founder and CEO of Transform8 summarizes, *"the word hospitality comes from the Latin word hospes, which means both host and guest. This is a beautiful reminder that the exchange was never meant to be transactional – it was meant to be mutual"*. The host and guest are inseparable entities, and the act of welcoming an acknowledgement of shared vulnerability and belonging.

The commercialization of hospitality that has taken place in the twentieth century has strengthened the industry into one of consistency and professional rigor. That said, the relational quality of the hospitality encounter has been overshadowed.

The Ritz-Carlton's legendary motto *"We are ladies and gentlemen serving ladies and gentlemen"* is an evergreen one precisely because it reminds us that dignity must flow in both directions, and that true hospitality cannot be extended to a guest by an employee who has been depleted of their own sense of worth.

“
It's not about changing all circumstances – some you simply can't change. But you can strengthen the resources of those who have to act within those circumstances.
”

Prof. Dr. Claudia Witt, Professor
at the University of Zürich



The mirror effect

One of the most salient themes emerging from expert perspectives is the direct, structural relationship between how employees feel and how guests experience a property, a connection that is also proven in academic literature. Research in hospitality management highlights the strong relationship between employee psychological well-being and service outcomes^[8].

According to Rainer Stampfer, President of Global Operations at Four Seasons, “service excellence is an emotional and energetic exchange between our employees and our guests. An individual or team that is physically drained, mentally stressed, or even financially anxious cannot deliver generous, attentive, or memorable hospitality.” Sonal Uberoi, Founder & Wellness Director at Spa Balance Consulting, adds that “burned-out employees cannot deliver warmth, presence, care – and most importantly, trust. They can deliver transactions. That’s it.”

Only investing in guest-facing well-being and bypassing the psychological health of employees is like building on sand, as staff can only mirror the well-being they are extended. “If you want extraordinary guests, start with ordinary humans being treated extraordinarily well backstage,” says Aradhana Khowala.

Re-humanization should be embedded into organizational philosophy, beginning with an audit of what the experience of working within a given property is like. Chris Norton, CEO of Equinox Hotels, states that “the concept of genuinely caring about your organization and the others in it – that doesn’t mean you can’t be efficient and streamlined and do all the things these companies should do. But the genuine care expressed by everybody, all the time, in little gestures – just saying hello when you walk by somebody – these things are very underrated.”

“
One day I will write a book
called ‘Just a Smile’ – because
hospitality, again, is not
complicated. It’s about being
genuine, being interested, being
kind, and being warm.

”
Willem van Emden, Managing Director,
IMP Hospitality Group



Technology as invisible support of human interaction

Rejecting technology is neither necessary nor viable for the re-humanization of hospitality. Rather, a more nuanced view has emerged, emphasizing that technology's primary role is to reduce friction in human connection. In this sense, automation creates value when it functions as an unobtrusive support system, enabling and enhancing meaningful human interaction rather than replacing it.

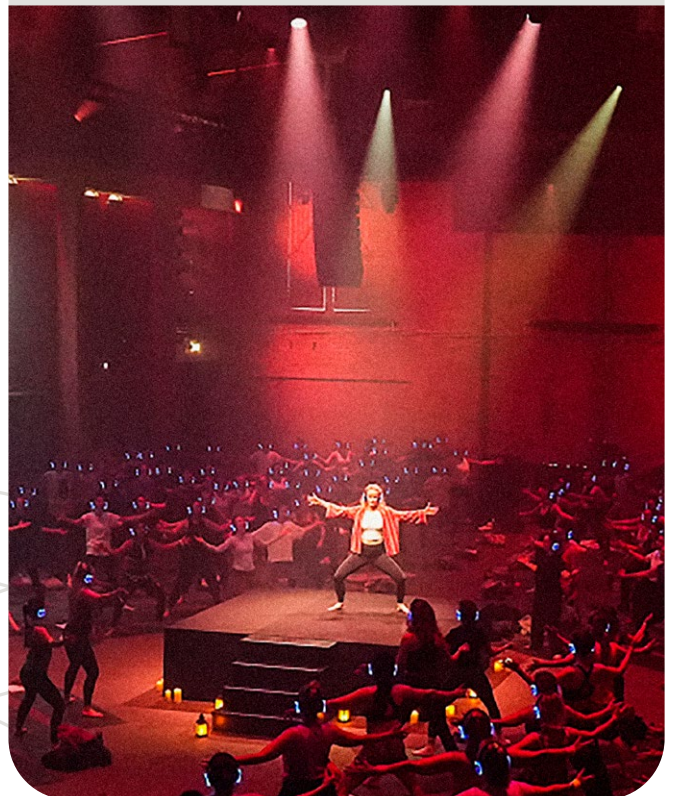
Consequently, Alina Hernandez sees the role of the host becoming that of *"an experienced curator"*, whose focus is on reading a person and responding with emotional intelligence as opposed to robotically executing a protocol.

The guest, meanwhile, has become increasingly sophisticated in detecting the difference. *"The traveler today expects something way more than a transaction,"* Hernandez observes. *"The guest now knows when that's what they're getting."*

“
The traveler today expects something way more than a transaction.

”
Alina Hernandez

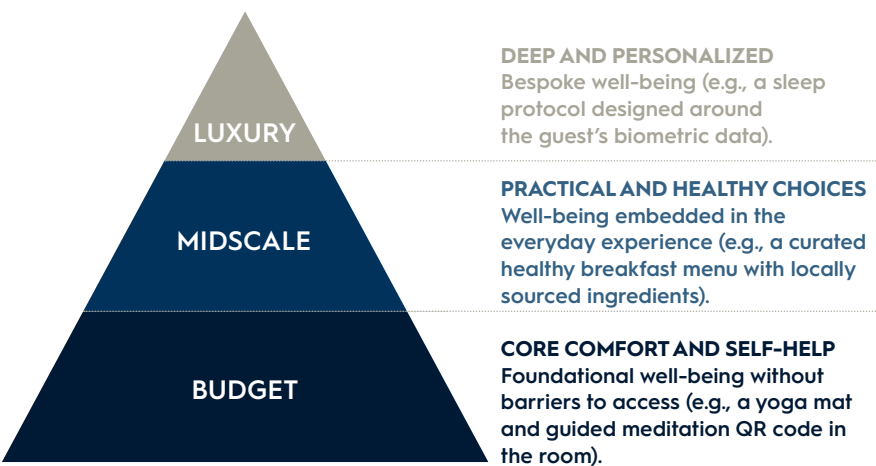
Sanctum is a music-led mind-body movement experience blending kundalini yoga, qigong, breathwork, and animalistic flow, all set to a cinematic soundscape. Having hosted over 1,000 live experiences globally, Sanctum launched its first digital platform in 2026 to extend the practice into an in-room wellness experience for hotel guests. The access is through a QR-code and it is directly integrated into the room's entertainment systems with curated journeys that are developed specifically for the hotel partner to reflect the property's identity. Guests can track how their energy and inner state evolves with the Frequency Arc. Sanctum's platform shows how technology can deepen a human-centered well-being practice.



ROX: Return on Experience

Re-humanization is not only an ethical framework for hospitality, but also an important business consideration. Dr. László Puczkó has developed the concept of ROX or Return on Experience to describe “the business value of guest well-being and a competitive differentiation”. Puczkó argues that providing well-being experiences in every segment is a necessity to not fall behind.

ROX makes the economic argument for well-being, the rationale being that the experiences that make a guest feel restored and cared for produce memory, loyalty, advocacy, and return. Research shows that emotionally connected guests are considerably more valuable than highly satisfied ones, being more likely to return, spend more per stay, and recommend the property to others^[82].



Set in the mountains of Minas Gerais, Brazil, **IBITI Projeto** is a regenerative hospitality and socio-environmental initiative spanning over 6,000 hectares bordering the Ibitipoca State Park. Founded in 1982, it operates three accommodation concepts that are each designed around deep immersion in a natural landscape that is itself actively in recovery, through rewilding programs including the reintroduction of endangered Atlantic Forest species. The concept integrates guest experience, employee well-being, and community into one model. The property employs over 300 people from surrounding communities and operates the Communitary, which is a knowledge-sharing platform connecting local entrepreneurs and schools. Guests become participants in a living system, which adds to the psychological depth of the experience and creates a sense of meaning and connection.

INDUSTRY RECOMMENDATIONS



Audit for authenticity

Review service touch points to see where standard procedures may be too rigid. Empower staff to lead with emotional intelligence and respond authentically to guests.



Redesign the employee experience first

The guest experience is a downstream outcome of the employee experience.



Position technology as a human enabler

Automation should free people to be more present rather than be only aimed at reducing headcounts.



Restore the sense of mutual exchange

Return to the hospes principle by designing hospitality encounters in which the dignity, care, and humanity that flows from host to guest also flows, in the design of working conditions, from the organization to the people who make that care possible.

4

Physical space as a well-being intervention: the architecture of restoration

There is a scientifically proven relationship between built environment and human psychological state^[83]. Yet, for most of its modern history, hospitality spaces have been designed with aesthetics and operational efficiency at the forefront.

The findings of the research of this report point to a new understanding of physical spaces in hospitality as an active well-being agent. The evidence of this model is drawn from neuroscience and environmental psychology and has direct implications for how hospitality properties are designed and operated.

“
Every hotel is doing something to the human mind. The only question is whether it’s healing or harmful.
”

Dr. Aradhana Khowala, CEO, Aptamind Partners





The science of restorative environments

Environmental psychology has been documenting the relationship between natural environments and stress recovery since the 1980s. Kaplan's foundational Attention Restoration Theory^[84] proposes that the human capacity for directed attention, meaning the effortful, sustained focus required to navigate modern professional and social life, is a finite resource that depletes under conditions of sustained cognitive demand. Natural environments, which are characterized by what the theory names "soft fascination", or the gently and effortlessly engaging stimuli that occupy the mind without draining it, provide the conditions for this capacity to recover

A subsequent body of research has confirmed and extended these findings, showing that exposure to natural light, nature views, and other biophilic design elements is consistently associated with reduced cortisol levels, lower blood pressure, improved emotional regulation, and enhanced cognitive performance^[85-86].

The emerging field of neuroarchitecture, which applies neuroscientific methods directly to the study of built environments, has begun to identify the specific spatial variables that influence physiological stress responses, including room proportions, ceiling height, acoustic density, lighting temperature and circadian alignment, color saturation, and so on. All of these variables have been shown to generate measurable effects on brain activity and subjective experience of stress and ease^[87]. For instance, designs that incorporate nature-like elements and maximize access to natural light are associated with reduced self-rumination and improved psychological well-being^[50].

For hospitality, it means that every design decision is also a well-being decision.

“*Hospitality design has entered a new era – one where the spa, the gym, the guest room, and even the corridor are conceived as a continuous landscape of wellbeing. Light, materiality, acoustics, and flow are being choreographed not just for beauty, but for how they make the body and mind feel. Wellness isn’t an amenity anymore; it’s the architecture.*”

Adam D. Tihany, Founder at Tihany Design
and Tihany Product Design

Nervous system health as the starting point for design

Every environment that a guest enters places a load on the nervous system, with light, sound, temperature, and sensory stimulation affecting their emotional state. Most of this processing happens unconsciously.

According to Wellness Strategist Shoshana Weinberg, *“psychological well-being for guests means the nervous system can soften – that the environment communicates safety without words, that beauty regulates rather than overwhelms, that silence is available, and that human interaction feels authentic rather than transactional. In this sense, the highest luxury is the ability to exhale.”*

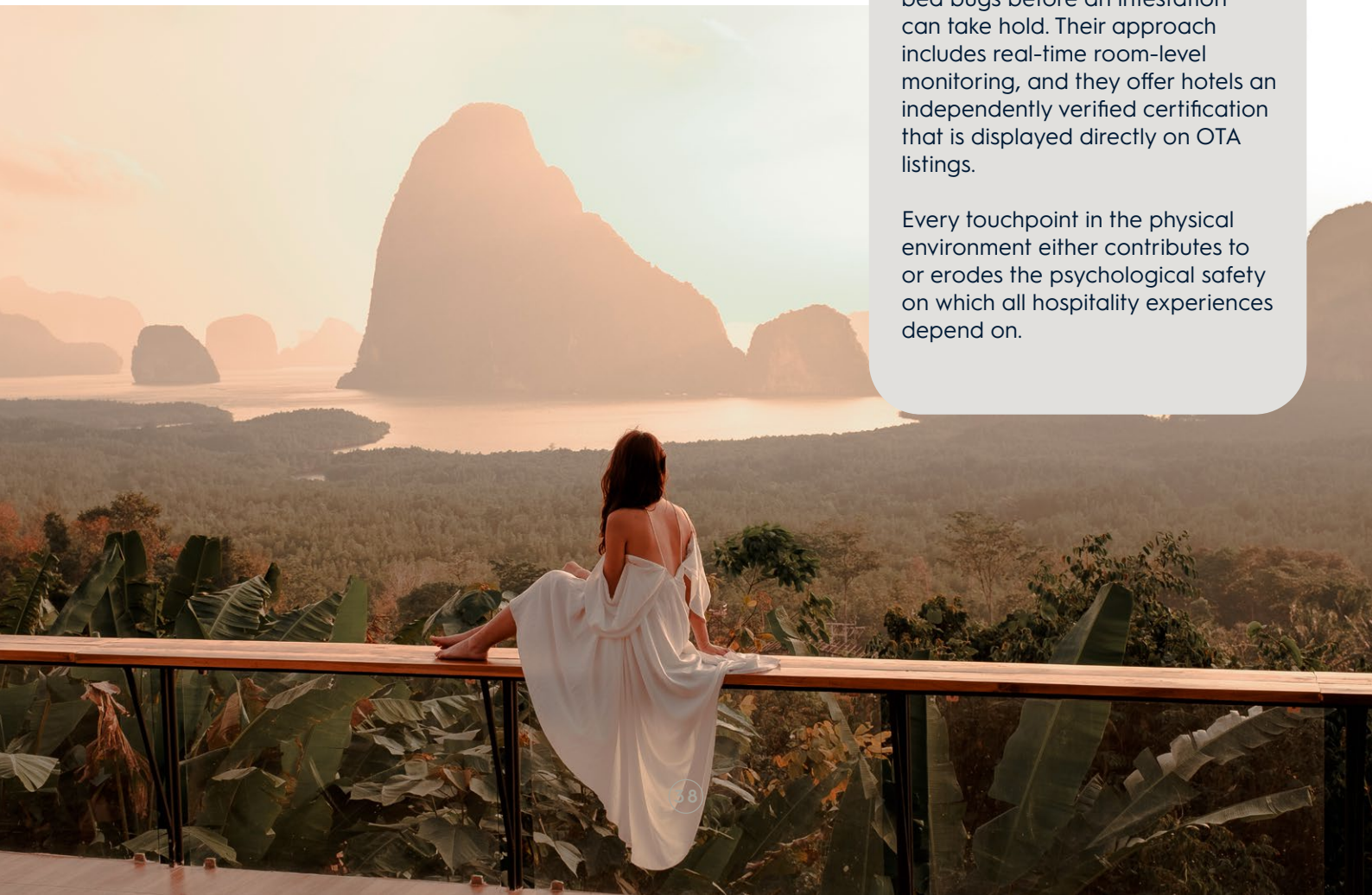
Aesthetics and well-being are two distinct things, as even a visually spectacular environment can be overstimulating or complicated to navigate through, ultimately undermining the psychological restoration a guest is seeking. While hospitality does not control the lives of guests, it can control *“the space, the pace, the tone, the sensory load and the human interactions. Those either support nervous systems or strain them. Neutrality is a myth,”* says Aradhana Khowala. In other words, any given environment is a constitutive condition of well-being.

Psychological restoration begins with a guest who feels physically safe in a space that is clean, hygienic, and free from the anxiety that environmental threats, however small, reliably produce.

Ecolab's 2024 Hotel Guest Consumer Survey found that cleanliness ranks among the top three factors guests consider when selecting accommodation. Signals of physical safety or threat are processed by the nervous system before any conscious evaluation of the experience takes place. A guest who feels unsafe at the most basic sensory level cannot access the restorative state that hospitality is increasingly being designed to provide. Ecolab's certification program addresses this through science-based cleaning protocols that creates the foundation for guests to trust the environment.

A related dimension of guest psychological safety concerns bed bugs, which is one of the most anxiety-generating threats in hospitality, and one whose reputational damage is disproportionate to its frequency. Valpas is a Finnish hospitality technology company that has developed a pesticide-free prevention system that intercepts bed bugs before an infestation can take hold. Their approach includes real-time room-level monitoring, and they offer hotels an independently verified certification that is displayed directly on OTA listings.

Every touchpoint in the physical environment either contributes to or erodes the psychological safety on which all hospitality experiences depend on.



From amenity to infrastructure

If a property is designed with nervous system considerations in mind, a guest's well-being is not contingent on the use of a single amenity, such as a spa booking. Thoughtfully designed spaces are infrastructure that continuously support the guest, and employee, for that matter. Forward-thinking operators take this distinction between a wellness amenity and well-being as a design philosophy very seriously. Ett Hem in Stockholm is a clear articulation of this approach, as the property is conceived around the idea of not distinguishing between front and back of house.

The hotel's name directly translates to 'a home', and it is precisely this fluidity that creates a home-like living environment. The kitchen has large communal dining tables, there is an abundance of books and seating areas to dive into said books, as well as a courtyard garden that each serve as social and restorative spaces in their own right. Ett Hem, designed by Ilse Crawford, shows how spatial design can create the conditions for human presence, in one seamless entity..

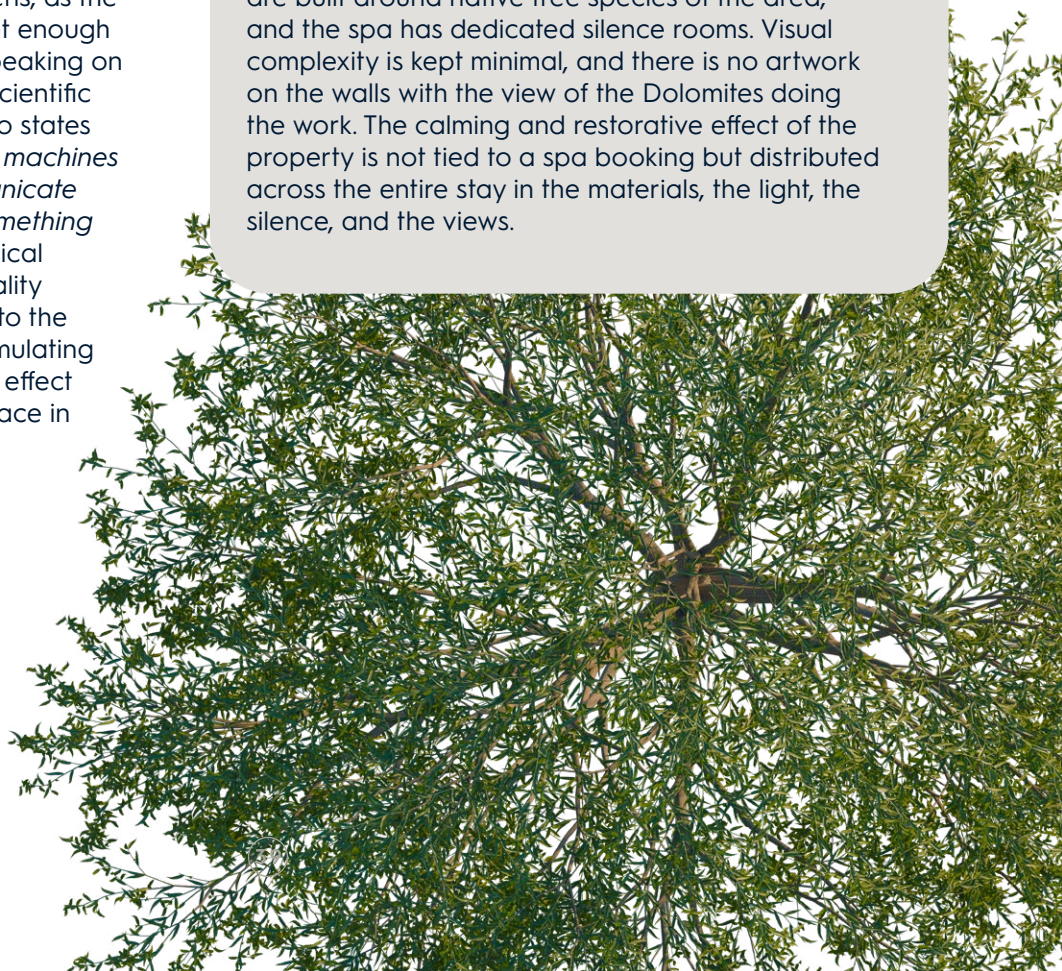
Even well-being amenities such as gyms need to be considered from this lens, as the mere presence of a treadmill is not enough to induce restoration or health. Speaking on movement spaces, Technogym's Scientific Research Manager Silvano Zanuso states that *"the place where you put the machines has to be beautiful, has to communicate calmness, has to communicate something towards general well-being."* Physical fitness environments within hospitality are not exempt from implications to the nervous system, and an overly stimulating environment can have a negative effect on guest well-being even if the space in question is a gym.

“
You don't need to sell wellness anymore. You need to create great spaces for people for them to continue their lives when they travel.
”

Lindsay Madden Nadeau,

Senior Director Wellness Strategy at Red Sea Global

Forestis is a 62-suite hotel which is situated at 1,800 meters in the Italian Dolomites. The property is built around the idea that physical space can actively support psychological recovery. There is no separate wellness program, as well-being has been embedded into every design decision. Rooms are lined in local spruce, which is a material with proven stress-reducing properties, and face the south with large windows so that guests receive natural light throughout the day. The building's three towers were positioned to preserve the surrounding forest and keep the acoustic environment as quiet as possible. The spa treatments are built around native tree species of the area, and the spa has dedicated silence rooms. Visual complexity is kept minimal, and there is no artwork on the walls with the view of the Dolomites doing the work. The calming and restorative effect of the property is not tied to a spa booking but distributed across the entire stay in the materials, the light, the silence, and the views.



The commercial reality of well-being spaces

Martin Goldmann, CEO of ASPA International, conceives the thoughtful design of spaces as a strategic priority. He states that in traditional wellness investment models, *“investors are not prepared to put that much money into spas. They don't see the return. And we don't have strong evidence to show them a good return”*.

This is the dissonance that follows from thinking that well-being value is concentrated in a spa that generates revenue per booking, when in reality, value is distributed across the entire environment, continuously influencing the experience of every guest. Data on retention and repeat visits are a much more reliable gauge for the impact of guest well-being than the performance of a single line item such as the spa.



Hotel Maistra 160 is a four-star superior boutique hotel in Pontresina in the Swiss Engadin, which opened in 2023 and was designed by architect Gion A. Caminada. Under owner Bettina Plattner-Gerber, the hotel has become one of Europe's pioneers in psychological well-being in hospitality. In collaboration with the Department of Complementary and Integrative Medicine at the University of Zurich and the Swiss Mind Body Medicine Association, Hotel Maistra launched Switzerland's first Mind Body Medicine Congress in autumn 2024 alongside seasonal "Deep Health Weeks" that include structured courses in topics such as mindfulness and breathwork run by certified practitioners and university researchers. Since 2025, the hotel has partnered with Swiss start-up ylah®, a medically approved app, to extend evidence-based practices beyond the stay itself. Mind Body Medicine is also being introduced as occupational health programming for the hotel team. From autumn 2026, the Engadin destination as a whole will adopt the Deep Health framework with other hotel partners.

INDUSTRY RECOMMENDATIONS



Assess the nervous system impact of your property

Understand the specific stressors your property places on the nervous system, such as the acoustic load, quality of lighting, and how simple it is to navigate.



Extend well-being design beyond designated wellness spaces

The principles of neuroarchitecture should be applied to the entire property, including liminal spaces such as lobbies and corridors, to those with more dwell time such as restaurants and working areas. All should be treated as well-being areas.



Design movement environments with the same logic

Design for calm, spaciousness, and coherence.

5

Transformative hospitality: a force for human flourishing

As the industry has become increasingly standardized, also the hospitality encounter has become more predictable. However, there is a collective move towards wanting

to understand more deeply what hospitality is trying to do for the people it serves, and its potential to be a facilitator of human well-being, meaning, and transformation.

“

When I look at the reviews we get, I sit and cry sometimes, because I still don't understand how in 72 hours you can touch someone's life like that – doing the simplest things on the planet.

”

Maira Delgado, Public Relations, Ibiti Projeto.



The limits of the transactional model of hospitality

The transactional model of hospitality, which treats the product of hospitality as comfort, service, and consistency, is starting to reach its limits. Guests increasingly report dissatisfaction with the substance of their hospitality experiences^[88] because the definition of quality has changed.

Karen Guggenheim, Founder and CEO of WOHASU, identifies the commercial logic of changing expectations: *“If you’re giving me a bed in a room, you’ve made yourself a commodity. I can stay at an Airbnb. Or I won’t even leave – I have a better bed at home.”* The differentiating value of a hospitality property lies in the psychological experience that consists of the quality of human connection and the opportunity for restoration.

“I think we are very transactional as hotels. The way people travel and what they expect is moving much faster than we are adapting. If you ask most hoteliers, they still talk about well-being as – hey, we have a gym and granola.”

”

Willem van Emden,

Managing Director, IMP Hospitality Group

Hotel companies are often underequipped to produce the transformative qualities hospitality can have. *“Large branded five-star chains tend to follow structured SOPs that create a baseline of security and some degree of customization. However, the effectiveness of these practices can diminish because psychological well-being is deeply personal and difficult to standardize,”* says Daniel Nitu, the general manager of Forest Retreat & Spa. In other words, the standardization that has taken the industry this far is now proving to be a structural obstacle for what guests want.



The transformation economy: what guests are seeking

The experience economy, a 1998 framework developed by B. Joseph Pine II and James H. Gilmore, explains how businesses have moved from merely offering goods and services to staging memorable experiences^[89]. The hospitality industry has been at the forefront of the discussion, with more than 78% of millennials choosing to spend money on experiences over goods^[90].

Now, Pine has extended the thesis with a successor concept, the transformation economy, which states that great experiences may no longer be enough, and consumers are looking for change in how they think, feel, or see their life^[91].

The traditional categories of the hospitality industry no longer match guest demands for transformation. According to Karen Guggenheim, *“It’s very difficult to be well if you don’t have meaning in your life. Meaning has three components: coherence, significance, and purpose. When you look at your values and align your decisions with those values, you are in coherence, because the brain does not like cognitive dissonance.”*

While hospitality experiences can be transformational, the industry rarely directly addresses the guest in this way. The focus is oftentimes on serving hedonic needs for rest or pleasure, instead of being a reorientation toward what is meaningful in the eudaimonic sense of well-being, as introduced in the outset of this report.

The transformation economy is a commercial articulation of the eudaimonic turn, and a recognition that hospitality can hold both the pleasurable and the meaningful.

Commercial considerations of transformative hospitality

Naturally, not following shifts in consumer demand and adjusting offerings has its consequences. According to Satya Anand, Group President for the US, Canada and CALA at Marriott International, “well-being generally in society has gathered a new meaning which was not there before. My belief is if you don’t pay enough attention to it, it could be a competitive disadvantage and potentially, if carried on without really taking these things into account, it could potentially prove detrimental to your entire business model.” In other words, the hospitality value proposition must recalibrate to include meaning-making.

As Stefani Bardin, Founder of unstuck: consultancy, points out, this change is easier

said than done for operators. “The question isn’t whether we should talk about well-being – it’s whether we are willing to redesign around it. Talking is easy. What’s hard is untangling the operational complexity, the cultural assumptions, and the misaligned incentives that keep well-being stuck as a line item instead of a design principle.”

While the industry has historically separated between the hard commercial metrics of hospitality and the soft language of well-being, the distinction is becoming increasingly arbitrary. According to Digital Wellness Expert and Entrepreneur Gabriel Pitt, “well-being is not a soft topic. It’s a performance lever”. Hospitality can both have an impact and be commercially viable.

“
It’s not performance or well-being – it’s not a trade-off.
We have to both care for people and have ambitious
goals, have an impact, something that makes you proud
of what you do, and not one at the expense of the other.
”

Vanessa Balouzet Uchanski, Chief Growth Officer, EHL



The guest responsibility question

One of the most nuanced ethical debates emerging from this research concerns the limits of the role and responsibility of hospitality in guest transformation. The industry is not, and should not position itself as, a clinical or therapeutic institution, yet there is much that can be done beyond the traditional service encounter to enhance the psychological well-being of guests.

Wellness pioneer Anna Bjurstam distinguishes between the personal responsibility of the guest and the context of well-being that hospitality offers. *"I don't think the hospitality industry has a responsibility to make people more well. I would say it's a responsibility to offer opportunities for well-being."* While making someone well is beyond the scope of the industry, offering the conditions in which well-being can occur is something which is entirely within the power of hospitality, and increasingly, within what guests are expecting from their hospitality experiences.

At Clinique la Prairie, a longevity clinic welcoming guests from around the world for almost a century, offers the most advanced approaches to longevity and well-being. At the heart of everything lies an important idea: that aging is not fixed, that biology, energy and vitality are profoundly modifiable at any stage of life. *"We can offer the finest science, the most precise protocols, the most dedicated experts,"* reflects Longevity Innovation Director Olga Donica. *"But the most important shift must first happen in the mind. A longevity mindset, the conviction that one's health and vitality can always be improved, is what transforms a stay into a life-long shift. True longevity is a partnership that begins here and continues long after."*

Bliss & Stars is an off-grid wilderness retreat founded by Daria and Heine Rasmussen, that sits on 1,350 hectares of remote Cederberg Mountain wilderness in South Africa's Western Cape, 300km north of Cape Town. The property is built on the premise that deep psychological restoration requires the removal of modern stressors, and the retreat operates without Wi-Fi access for guests, no alcohol, and no caffeine. Daria is a certified mindfulness teacher and somatic experiencing practitioner and guides guests through breathwork, meditation, Qigong, and nature immersion, while co-founder Heine, an astrophotographer and astronomer, leads evening stargazing sessions designed to evoke awe and a shift in perspective. Meals are communal, plant-based, and alcohol-free, creating conditions for authentic human connection without social lubricant. Retreats run for a minimum of three nights, which is a threshold the founders found essential after experimenting with shorter stays, as the results were less in-depth. Daria describes the retreat's underlying philosophy as a correction of misaligned priorities: *"Our society tends to value constant activity and sees productivity as the measure of our worth."* Guest feedback consistently describes experiences of transformation, resulting from the compound effect of stillness, nature, and real human connection operating together over time.

INDUSTRY RECOMMENDATIONS



Redefine the value proposition

Instead of telling the guest what you provide, express what you make possible. This simple reframing takes you from a service provider to a facilitator of human flourishing.



Design for depth

Invest in understanding what guests are looking to restore when they travel and design the offering from the environment to guest touchpoints to address that need directly.



Build continuity beyond checkout

Design the post-stay relationship to let guests carry their new perspectives into their daily lives.



Train leaders

Transformative hospitality requires leaders who are engaged with their own well-being.

An abstract geometric pattern consisting of several overlapping circles of varying sizes, creating a complex web of lines and shapes. Small dots are scattered throughout the composition, some at the intersections of the circles and others in the open spaces. The overall effect is a sense of interconnectedness and complexity.

Future FUTURE DIRECTIONS directions

A glimpse into the future

The future is unwritten, yet it is filled with opportunities waiting to be seized. The hospitality industry faces a dynamic and rapidly changing landscape defined by technological transformation, environmental challenges, rising health awareness, mental well-being challenges, and increasing isolation in society. These pressing challenges also serve as opportunities for the industry to demonstrate leadership and creativity, as the hospitality industry can contribute to solutions for all of them. Future success will depend on the ability of industry leaders to adapt, innovate and engage with complexity in meaningful ways. As the Alan Kays saying goes, *“the best way to predict the future is to invent it.”*^[94].

Now, the future of psychological well-being in hospitality is being written by such pioneering operators in how they design and lead experiences. Guests are more

sophisticated with more specific demands than ever, and the industry workforce is increasingly unwilling to sacrifice its own health and well-being in the name of performance and optimization.

While these changes put pressure on the industry, they also present an opportunity for the industry to demonstrate that it takes the psychological well-being of both guests and employees seriously, something that is both ethically sound and strategically important moving forward.

The future success of the industry will depend on the ability of hospitality leaders to put the rising awareness of psychological well-being into action and treat it as a prerequisite for excellent hospitality.

From initiative to infrastructure

For most of the recent history of the hospitality industry, well-being has been treated as a separately budgeted program or was included in traditional wellness offers that is measured in isolation. As this report has shown, this approach has its limits, as the greatest impact comes from embedding well-being into all facets of the business, from the design of spaces to management and service philosophy.

Manager capability is one, if not the most, consequential determinant of employee psychological well-being. Leaders who can create psychological safety and respond to distress without pathologizing will be a baseline expectation moving forward.

“
We can no longer say it’s not our issue. This is not an option anymore.

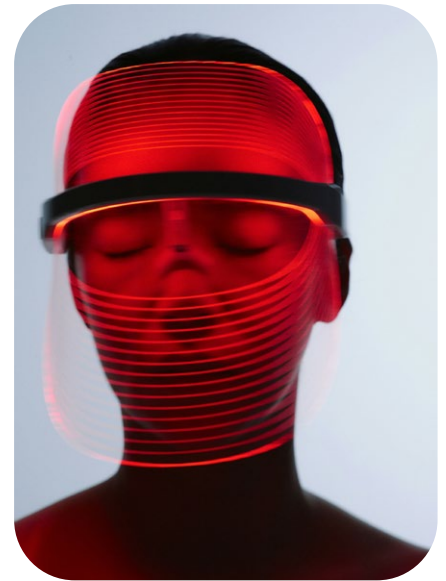
”
Vanessa Balouzet Uchanski,
Chief Growth Officer, EHL

Future trends in psychological well-being in hospitality

THE EMERGENCE OF THE WELL-BEING COORDINATOR

One concrete development anticipated by several of this report's contributors is a dedicated well-being coordinator that functions within hospitality organizations. This role is distinct from HR, distinct from the spa or wellness department, and distinct from clinical psychology. A well-being coordinator builds culture and human development and is responsible for coordinating well-being initiatives both for guests and employees. Furthermore, staff education in stress management and, perhaps more importantly, management education in psychological safety would be part of the description.

Currently no single department owns this function, which leads to the de-prioritization of the topic in times of operational pressure. A dedicated role adds a coherent approach and accountability.



DEMAND FOR LONGEVITY AND RESTORATION ARE ON THE RISE

Longevity science has taken the wellness economy by storm, also changing what guests are seeking in their stays. Several of this report's contributors identified that the functions of sleep optimization and nervous system regulation that used to be the domain of specialist medical clinics are migrating into premium hospitality programming as consumers have become more health-literate.

This trend will move beyond the luxury segment as longevity science becomes more accessible. Guests are already collecting personal health data with wearable tech, and properties are innovating how to put biometric-informed personalization into action. Erin Boyd Kappelhof, the CEO of Eat Well Global also sees nutrition playing a role. *"I think a really exciting area that we're seeing a lot more in is around personalized nutrition. There are more tools, products, more evidence behind the growing realization that a healthy diet means something different to different people."*



The reframing of luxury

Cognitive overload has become of the most prominent and defining stressors of the 21st century. Hospitality could position itself as a space for facilitated disconnection, for instance with off-the-grid retreats and digital detox programs, and for the guests looking for hedonic pleasures, escapism. What luxury means in hospitality may increasingly shift from material excess toward mental calm and psychological restoration. Opulence and consumption become less of a priority compared to tranquility and mindfulness.

“

The most rapid growth is currently happening in the luxury and ultra-luxury hospitality segment. Hotels use wellness and longevity programs as a way to differentiate their brand and attract high-value guests.

”

Vessela Toncheva-Schenk,
General Manager at Blue Longevity Clinic

AI and emotional personalization

The integration of technology in well-being initiatives will continue to deepen, and artificial intelligence is evidently part of these developments. There are emerging applications of AI for predictive mood tracking which would allow service providers to adapt their services to the emotional state of the individual guest.

Again, wearable technologies are an important part of the deepening presence of technology, as they are creating demand for continuity between their at-home health practices and the hospitality environments they enter.



Nuggets of inspiration into what the future may hold



1. AI-Powered “Digital Phenotyping”

Artificial intelligence is turning everyday behaviors into early signals of psychological well-being. By analyzing voice tone, speech patterns, typing rhythms, and movement data, “digital phenotyping” enables earlier detection of mental health risks, often before individuals are consciously aware.

Example: Kintsugi and Ellipsis Health are among the leading applications of voice biomarker AI. The technology detects signs of clinical depression and anxiety from short clips of natural speech by analyzing pitch, intonation, rhythm, and pauses, and does not rely on self-reported questionnaires. Both platforms were originally developed for healthcare settings, but the positive results of identification rates of more than 80% have implications for other industries. In a hospitality context, similar tools could help identify early burnout in staff or detect shifts in guest well-being through interaction patterns, allowing for more proactive, human-centered responses.



2. Immersive mental training environments

Virtual reality is emerging as a powerful tool to train emotional resilience and cognitive flexibility. By simulating real-life stressors in controlled environments, individuals can safely practice responses to anxiety or social pressure.

Example: BehaVR develops immersive, evidence-based VR programs that help regulate stress and build resilience through techniques such as exposure therapy and mindfulness. The platform combines behavioral science with real-time data and gamified environments to “rewire” responses to triggers and improve long-term mental health outcomes.



3. The gut-brain axis and psychobiotics

The link between nutrition and mental health which was explored in our last report already, is becoming ever more tangible, with the gut playing a central role in emotional regulation. Innovations in “psychobiotics” are opening new pathways for managing anxiety and even severe mental health conditions.

Example: Targeted probiotic strains are being developed to reduce anxiety, while clinical trials explore ketogenic diets as supportive therapies for disorders such as bipolar disorder and schizophrenia.



4. Psychological resilience as prevention

Borrowing from immunology, new approaches aim to “inoculate” individuals against misinformation, manipulation, or cognitive bias. Short, targeted interventions can strengthen critical thinking and emotional resilience before exposure to harmful content.

Example: Jigsaw (Google) has developed “prebunking” tools and games such as Bad News and GoViral! that expose

users to weakened versions of manipulation tactics. Research shows these interventions can significantly improve people’s ability to detect misinformation by training them to recognize patterns before encountering them in real life.



5. Biological breakthroughs and new therapies

Emerging research is redefining mental health as a deeply biological process, unlocking new treatment pathways. From cellular-level mapping of depression to the resurgence of psychedelic-assisted therapies, the field is rapidly evolving.

Example: Scientists have identified specific brain cell activity linked to depression, while compounds like psilocybin and MDMA are being fast-tracked as treatments for PTSD and treatment-resistant depression.



6. Social robots and digital companions

AI-powered companions are emerging as a new layer of emotional support, designed to reduce loneliness, anxiety, and social isolation. These systems combine conversational AI with behavioral learning to build ongoing, personalized interactions that feel increasingly human—particularly in moments where access to human connection is limited.

Example: Replika offers users a conversational partner that adapts over time to provide emotional support, while ElliQ delivers a physical, voice-

enabled companion designed to proactively engage users in conversation and well-being activities.



7. Privacy as a therapeutic feature

Trust is foundational for psychological well-being. As digital tools collect deeply personal data, privacy is becoming a core component of therapeutic quality. Design should be safe by default with transparent data use and user-controlled consent, as they are critical enablers of engagement and disclosure.

Example: The Federal Trade Commission case against BetterHelp highlighted the risks of ad-tech-style data sharing in mental health, while emerging research in Nature Digital Medicine points toward more user-controlled data architectures.



8. From access to true inclusion

The next step in psychological well-being is wider relevance beyond current increasing accessibility. Solutions must adapt to language, culture, context, and the lived realities we have present in the hospitality industry both with employees and guests. Recognizing that mental health experiences and help-seeking behaviors vary widely across populations. Without this, digital tools risk reinforcing, rather than reducing, disparities.

Example: *Wysa* has shown higher engagement and disclosure in Spanish versions, while models like *Friendship Bench* demonstrate how culturally grounded approaches can scale effectively when digitized.



9. From engagement to measurable outcomes

The business model for mental health is shifting from user engagement metrics to proven impact. Employers, insurers, and institutions increasingly demand measurable clinical and economic outcomes, which is accelerating the move toward performance-based models.

Example: *Spring Health* is advancing measurement-based care at scale, while data from the *Peterson Health Technology Institute* shows a growing shift toward outcome-linked purchasing in digital mental health.



10. Purpose as a protective health factor

Purpose is moving beyond a talent strategy or business imperative toward becoming a clear determinant of psychological health. Rooted in the concept of eudaimonia we explore in this report, it is increasingly linked to greater resilience and improved long-term mental and physical outcomes. It is proving essential both for attracting the next generation and for sustaining the well-being of today's workforce.

Example: *Blue Zones*, which we highlighted in the *EHL Food and Well-being Report*, identifies purpose as a key factor in the world's longest-living populations, demonstrating its measurable impact on health and overall life satisfaction.



Call to action for hospitality leaders: how you can become a catalyst

Psychological well-being is no longer a peripheral issue within hospitality. As global awareness of mental health continues to grow, hospitality organizations have an opportunity and responsibility to integrate psychological well-being into their core business strategies.

In the near-term, having the most impact when it comes to psychological well-being requires an honest assessment of the current situation, where the employee experience is audited with the same rigor as the guest experience. Service standards

should not be as rigid as to erode the autonomy and dignity of staff, and manager training should include the accountability for employee psychological safety.

Focus on embedding psychological well-being into design of both spaces and service, and incorporate evidence-based architecture that promotes restoration, such as biophilic elements. Now that nearly every single property has some sort of wellness offering, position your stays as a catalyst for sustained change where guests will integrate

the attention to well-being into their lives at home. Credibility is extremely important as guests are more aware and discerning, so building partnership with well-being practitioners in sleep science, nutrition, or mindfulness will validate your offering.

Well-being should not be treated as a marketing claim, and there needs to be a level of consistency in both guest and employee experience. Build a culture of well-being where it is visible at every level of the organization and track the outcomes.

Training current and future leaders

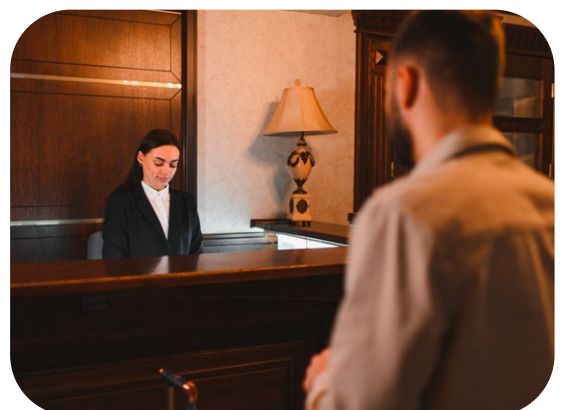
The conducted interviews showed that many leaders are not yet fully prepared or equipped to navigate the growing complexity of psychological well-being. While the expectations placed on them have evolved rapidly, such as requiring empathy, awareness, or the ability to manage human dynamics with nuance, the corresponding training and support systems have not kept pace in many cases.

If psychological well-being is to move from aspiration to long-term reality, the decisive lever is leadership. We need both current and next-generation leaders who are equipped to operate at the intersection of care and complexity.

This change calls for a redefinition of what leadership in hospitality means, beyond operational excellence and guest satisfaction. Leaders must now be capable of designing environments where both guests and employees can function, recover, and thrive; something that must be learned and continuously developed.

Institutions such as [EHL Hospitality Business School](#) are playing a pivotal role in redefining hospitality education, integrating well-being and human-centric leadership, into curricula. Training future leaders cannot remain anchored in past models of service and management.

Ultimately, the future of psychological well-being in hospitality will be determined by the quality of leadership at every level of the organization.



Conclusion

This report sought to show that psychological well-being is foundational for hospitality experience. The five documented key developments show that the hospitality industry is moving from efficiency to attention and from transaction to transformation. Central to this change is the understanding of the interdependence of the well-being of guests and employees – there cannot be one without the other.

The hospitality industry has struggled to sustain guest loyalty aside from point collection programs and price competition. However, the operators that offer guests transformation and a feeling of psychological well-being will outperform the properties that perform plastered-on wellness when it comes to guest advocacy. Again, the ability to do so is largely determined by the well-being of the employees behind the experience.

Any hospitality organization that wants to remain relevant in the years ahead will need to internalize that caring for the inner state of human beings, their psychological well-being, is a strategic and measurable imperative that is the defining marker of modern excellence. And ultimately, we must remember that the future of psychological wellbeing is not one sector or one app. It is a stack of signals: digital, social, organizational, civic, ethical, and economic, that together redefine well-being as something designed into everyday life rather than retrofitted after crisis, and we all have a role to play.



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