

The Global Wellness Tourism Economy

2013



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Foreword

It is my sincere pleasure to introduce you to the 2013 Global Wellness Tourism Economy Report, a landmark study commissioned by the Global Wellness Institute (GWI), in conjunction with leading research firm SRI International (SRI), and presented at the 2013 Global Wellness Tourism Congress in New Delhi, India. This is the very first study to benchmark and analyze one of the fastest-growing global tourism segments: wellness tourism.

Why is wellness tourism on such an astounding growth track? It is important to first understand its definition, which SRI defines as “all travel associated with the pursuit of maintaining or enhancing one’s personal wellbeing.” It is not medical tourism; it is an explosive new travel category that exists at the powerful intersection of two of the world’s largest markets—the US\$2-trillion wellness economy and the US\$3.2-trillion global tourism industry. SRI suggests categorizing a wellness traveler as either a primary or secondary wellness tourist and stresses the impact of both domestic and international tourism markets.


This in-depth report is packed with eye-opening findings, and I sincerely believe every government, every tourism board and every travel -related business should sit up and take notice. Consider just a few of the key statistics: Wellness tourism is already a US\$439-billion market—or more than ONE in SEVEN of all tourist dollars—and is set to grow to US\$678.5 billion in three short years (by 2017). It is directly responsible for 11.7 million global jobs, which deliver US\$1.3 trillion in global economic impact. And let’s not forget that wellness tourists spend, on average, 130 percent more than the average global tourist!

While Europe and North America dominate this market for now, over 50 percent of the projected growth in wellness tourism through 2017 will come from Asia, Latin America and the Middle East/North Africa.

We all live in a more complex, and interconnected, world where the interest in personal wellbeing and in travel are both at all-time highs. The fact that these two relatively young industries, each with incredible power and potential, are now intersecting should be of interest to every country, industry and person in the world.

Thank you for taking the time to review this research study and for recognizing the need and opportunity for this global conversation. Wellness tourism may be one of the most important megatrends our world has ever seen.

Susie Ellis



Chairman and CEO

Global Wellness Institute

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About SRI International

Founded in 1946 as Stanford Research Institute, SRI International is an independent, non-profit organization that performs a broad spectrum of problem-solving consulting and research and development services for business and government clients around the world. www.sri.com

About Global Wellness Institute

The Global Wellness Institute (GWI) is the parent organization of the Global Spa & Wellness Summit and the Global Wellness Tourism Congress. The GWI is considered the leading global research and educational resource for the \$1.9-trillion spa and wellness industry and is known for introducing major industry initiatives and regional events that bring together leaders and visionaries to chart the future of the industry. The GWI positively impacts global health and wellness by advocating for both public institutions and businesses that are working to help prevent disease, reduce stress and enhance overall quality of life.

About Global Spa & Wellness Summit

The Global Spa & Wellness Summit (GSWS) is an annual international event that brings together leaders and visionaries to positively impact and shape the future of the global spa and wellness industry. First held in 2006, each year's Summit provides a forum for top industry executives to exchange ideas and advance industry goals. www.gswws.org

About Global Wellness Tourism Congress

The Global Wellness Tourism Congress (GWTC) brings together public and private stakeholders to chart the course of the rapidly growing wellness tourism sector. Attendees include government ministers of tourism, health and economic development; CEOs of private companies; leaders and visionaries in related arenas such as medical tourism; and other industry VIPs who present data, engage in open dialogue and map the future of wellness tourism.

The Global Wellness Tourism Economy

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The Global Wellness Tourism Economy

Executive Summary

OCTOBER 2013



Executive Summary

Travel has not always been compatible with wellness, but this is changing.

Travel today can be bad for your health. Airport stress and transportation hassles, jet lag and poor sleep, disruption of exercise routines, and excesses in eating, drinking, and sun exposure can leave a traveler more stressed and less well after a trip. A recent Columbia University study of business travelers found that frequent and extensive travel can even increase cardiovascular risk factors (obesity, high blood pressure, high cholesterol).¹

This is ironic because many people look forward to travel as an adventure and as an opportunity to rejuvenate and de-stress. In fact, when an SRI International survey asked consumers what they do to maintain/enhance their personal wellness, “take a vacation” was among the top five activities selected.² As more and more people pay attention to their health, they increasingly want to keep up their healthy habits when they travel. And a growing segment of travelers are even taking trips specifically focused on maintaining and improving their personal health and well-being. This is driving the growth of wellness tourism.

Although wellness tourism is a relatively new niche segment within the global travel and tourism industry, the practice of wellness-focused travel is not new. Since ancient times, people have visited the Dead Sea for its therapeutic properties. Romans traveled to baths, hot springs, and seaside resorts for

treatments, healthier climates, purification, and spiritual rituals. For 1,500 years, the Japanese have traveled to hot springs or onsen for healing and community. In spite of the rigors of travel in today's world, the act of travel itself has long been considered a wellness-enhancing activity.

¹ Richards, Catherine A. and Rundle, Andrew G. “Business Travel and Self-rated Health, Obesity, and Cardiovascular Disease Risk Factors.” *Journal of Occupational & Environmental Medicine* 53.4 (2011): 358-363.

² SRI International survey of 1,077 consumers worldwide, conducted in 2010.

Defining Wellness Tourism

There is much that is unwell about travel today. Wellness tourism is ***travel associated with the pursuit of maintaining or enhancing one's personal well-being.***

Unwell Travel	Wellness Travel
 Unhealthy & over-eating	 Healthy living
 Travel stress	 Rejuvenation & relaxation
 Excessive drinking	 Meaning & connection
 Poor sleeping	 Authentic experiences
 Disruption of fitness routine	 Disease prevention & management
<p>Primary Purpose Wellness Traveler: Wellness is the sole purpose or motivating factor for their trip & destination choice.</p> <p>Secondary Purpose Wellness Traveler: Seek to maintain wellness while taking any type of trip.</p>	

What Is Wellness?

The word “wellness” entered the mainstream lexicon in the 1970s and has dramatically grown in popularity over the last 10-15 years. Still only hazily understood by most consumers, in popular usage the term can be applied to anything that makes one feel good or that is “healthy.” The modern concept of wellness is very much rooted in the Western (U.S. and European) traditions and may not be well understood in other parts of the world. However, the tenets underlying wellness can be traced to the ancient civilizations of Asia, Greece, and Rome.

Consistent with the World Health Organization’s definition of “health,” this study defines wellness

as a state of complete physical, mental, and social well-being.³ It goes beyond mere freedom from disease or infirmity and emphasizes the proactive maintenance and improvement of health and well-being.

Expressed on a continuum that extends from reactive to proactive approaches to health, wellness falls firmly on the proactive side, incorporating attitudes and pursuits that prevent disease, improve health, enhance quality of life, and bring a person to increasingly optimum levels of well-being.⁴

³ Preamble to the Constitution of the WHO, www.who.int/about/definition/en/print.html.

⁴ The continuum concept is adapted from Dr. Jack Travis’ Illness-Wellness Continuum. Travis was one of the pioneers of the modern wellness movement in the late 1970s.

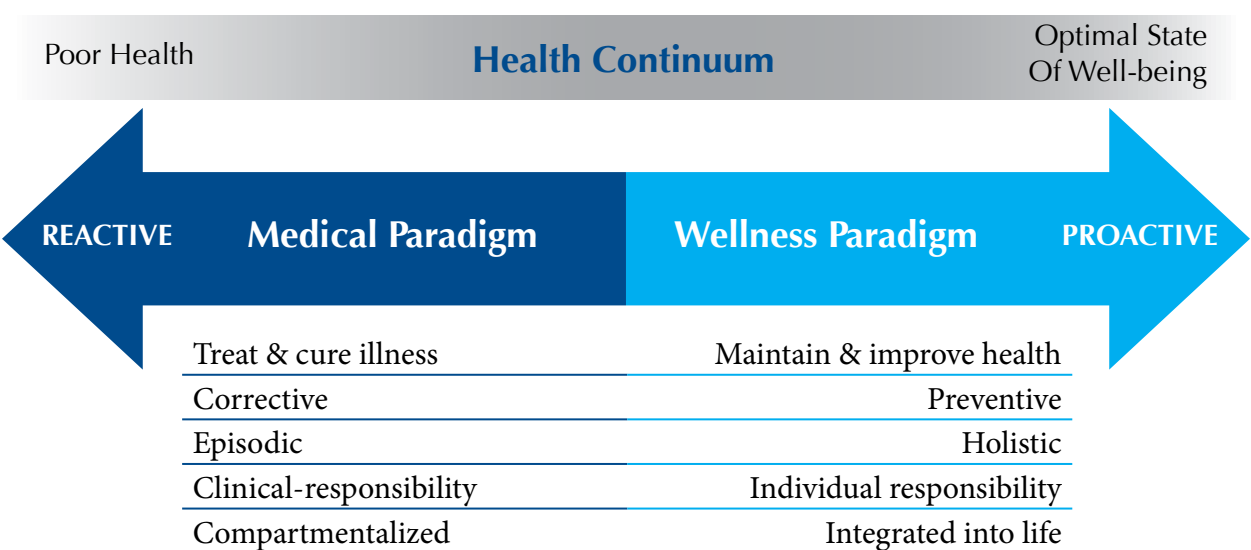
Wellness-minded consumers integrate healthy habits and activities into their lifestyles and their travel.

The unhealthy aspects of travel reflect a broader trend – people are unwell, and increasingly so. Aging populations, an alarming rise in chronic disease and unhealthy lifestyles, failing medical systems with rising costs, and the stress associated with the modern lifestyle are all driving a mounting global health crisis. While these challenges are already pervasive in developed world, they are also rapidly rising in developing countries as people grow more wealthy, urbanized, and sedentary, and increasingly adopt Western lifestyles and products.

Many consumers are fighting back, seeking better ways to take care of themselves, actively making lifestyle changes, and taking greater responsibility for maintaining good health. This

trend is driving the emergence of a wellness industry – broadly including complementary and alternative medicine, nutrition and weight-loss, spa, fitness and mind-body activities, beauty and anti-aging, preventive and personalized health, and wellness tourism.

Consumers who have integrated wellness into their lifestyles are also reflecting these interests when they travel. While some wellness travelers may take a trip entirely for wellness purposes (“primary-purpose wellness tourism”), others may engage in wellness-related activities as part of a trip (“secondary-purpose wellness tourism”). Both segments represent unique and important opportunities for businesses, tourism destinations, regions, and countries that want to attract this high-yield customer segment.



Wellness Travelers...



Wellness tourism represents the intersection of a powerful lifestyle trend and a growing global industry.

As one of the world's largest industries, tourism directly accounts for 100 million jobs worldwide. Its economic impact supports 9% of global GDP (\$6.6 trillion in 2012, according to the World Travel & Tourism Council).⁵ The rise of the global middle class – and the basic contemporary human need to rest, de-stress, and experience other places and cultures – continues to fuel an industry whose worldwide growth has surpassed that of major industries such as manufacturing, financial services, and retail.

At the same time, global demographic, lifestyle, and health trends are drawing attention to how wellness may be able to improve life, enhance businesses' bottom lines, and reduce societal healthcare costs. As a result, wellness tourism is positioned at a profitable intersection between

the rising wellness industry (estimated by SRI International to be approximately \$2 trillion in 2010) and the world's massive tourism economy.

⁵ WTTC, Travel & Tourism Economic Impact 2013, www.wttc.org/site_media/uploads/downloads/world2013_1.pdf

Why Study The Wellness Tourism Economy?

- Tourism is a large and fast-growing industry.
- Wellness is a strong consumer trend.
- Wellness tourism is growing faster than the overall tourism industry.
- Wellness tourists are high-yield tourists who bring greater economic impacts.
- Wellness tourism can support preservation of traditional culture and natural assets, and can stimulate entrepreneurship.
- Wellness tourism brings in revenues, creates jobs, and may help improve the well-being of the general population.

Why Is Wellness Important To People, Business, & Government?



Worldwide obesity has nearly doubled since 1980.



Over half the global business population has experienced an appreciable rise in workplace stress in recent years.



Almost 10% of the world's adult population has diabetes.



From 2002 to 2020, health spending in OECD countries will more than triple, to \$10 trillion.



Chronic disease is responsible for 60% of deaths.



From 2000 to 2050, the proportion of the world's population over 60 years will double.

Source: WHO, PWC, Regus

Defining And Measuring The Wellness Tourism Economy

Measuring the size and economic impact of an industry is complicated and can be especially daunting for a segment that is not easily defined. Following international conventions for measuring tourism, this study measures wellness tourism by aggregating the expenditures of people who are defined as wellness tourists, instead of aggregating activities of “wellness tourism industry businesses.”

Wellness tourism spending may or may not take place in businesses or activities that one typically associates with wellness. For example, the lodging used by a wellness traveler could be a destination spa or a traditional hotel/resort. Other categories of wellness tourism expenditures (food & beverage, shopping, etc.) may range from “generic” to “wellness specific.” All of these types of expenditures are part of the wellness tourism economy so long as they are made by a traveler whose primary or secondary trip purpose is to pursue wellness.

Definitions

The wellness tourism economy is all expenditures made by tourists who seek to improve or maintain their well-being during or as a result of their trip. It includes two types of expenditures:

1. International Wellness Tourism Receipts:

All receipts earned by a country from inbound wellness tourists, with an overnight stay.

2. Domestic Wellness Tourism Expenditures:

All expenditures in a country made by

wellness tourists who are traveling within their own country of residence, with an overnight stay.

See wellness tourist spending sub-categories on next page.⁶

Overview: The Wellness Tourism Economy

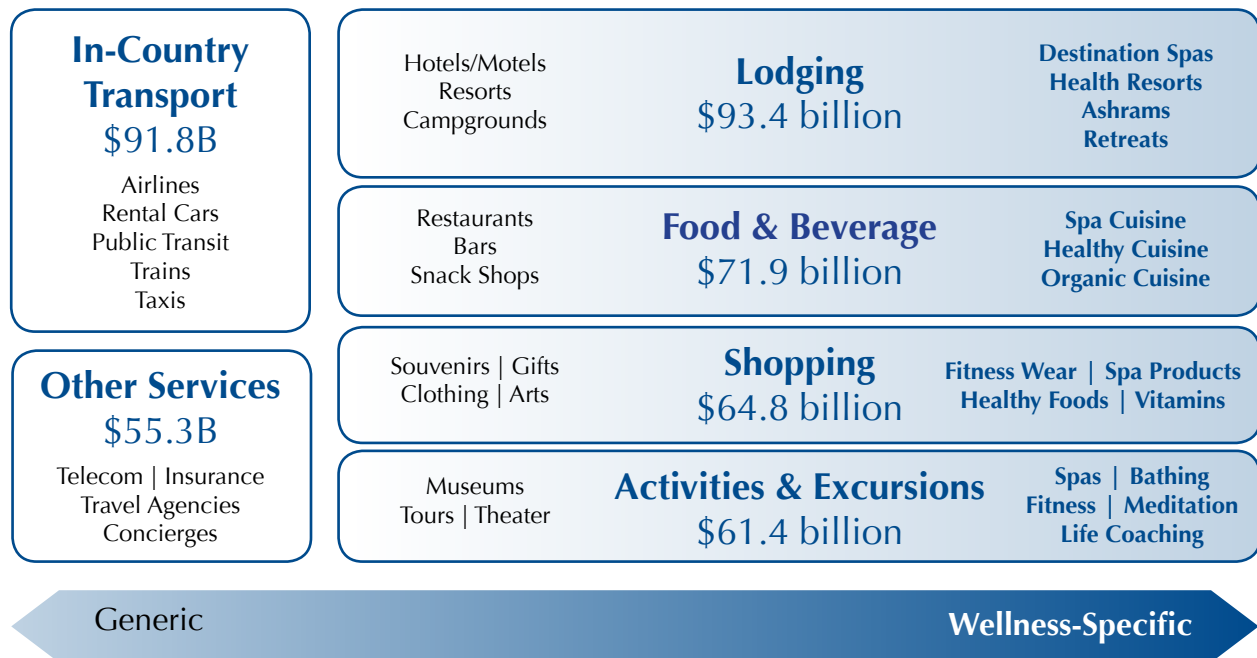
- Wellness tourism represents about 6% (524.4 million) of all domestic and international trips.
- Wellness tourism accounts for about 14% (\$438.6 billion) of all domestic and international tourism expenditures.
- Domestic wellness tourism is much larger than international, representing 84% of wellness tourism trips and 68% of expenditures.
- Those who seek to maintain wellness while traveling (secondary-purpose wellness travelers) represent 87% of wellness tourism trips and 86% of expenditures.
- Wellness tourism is projected to grow by more than 9% per year through 2017, nearly 50% faster than overall global tourism.
- Wellness tourism generates 11.7 million direct jobs, delivering \$1.3 trillion of global economic impact (1.8% of global GDP in 2012).⁷

⁶ Note that, following the conventions for calculation of international tourism statistics, international airfare is excluded from the calculation of wellness tourism expenditures.

⁷ SRI International for wellness tourism data; Euromonitor for general tourism data.

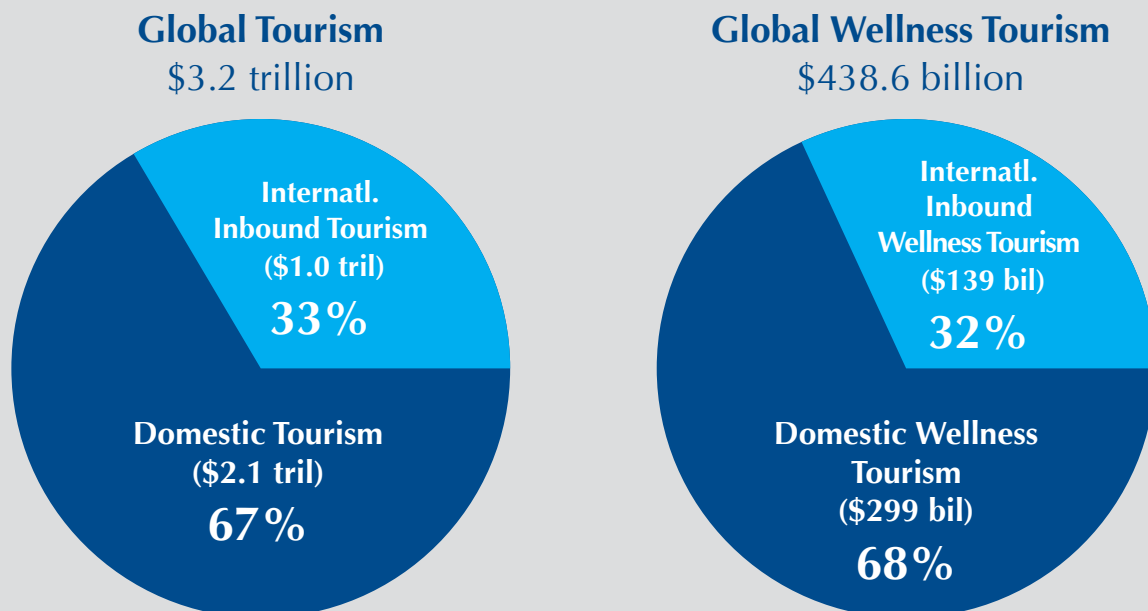
The Wellness Tourism Economy

\$438.6 billion global market



The examples provided in each sub-category are illustrative and not exhaustive.
Source: SRI International

Wellness tourism is a \$438.6 billion global market and a rapidly growing niche within the \$3.2 trillion global tourism economy.



Source: SRI International for wellness tourism data; Euromonitor for general tourism data.

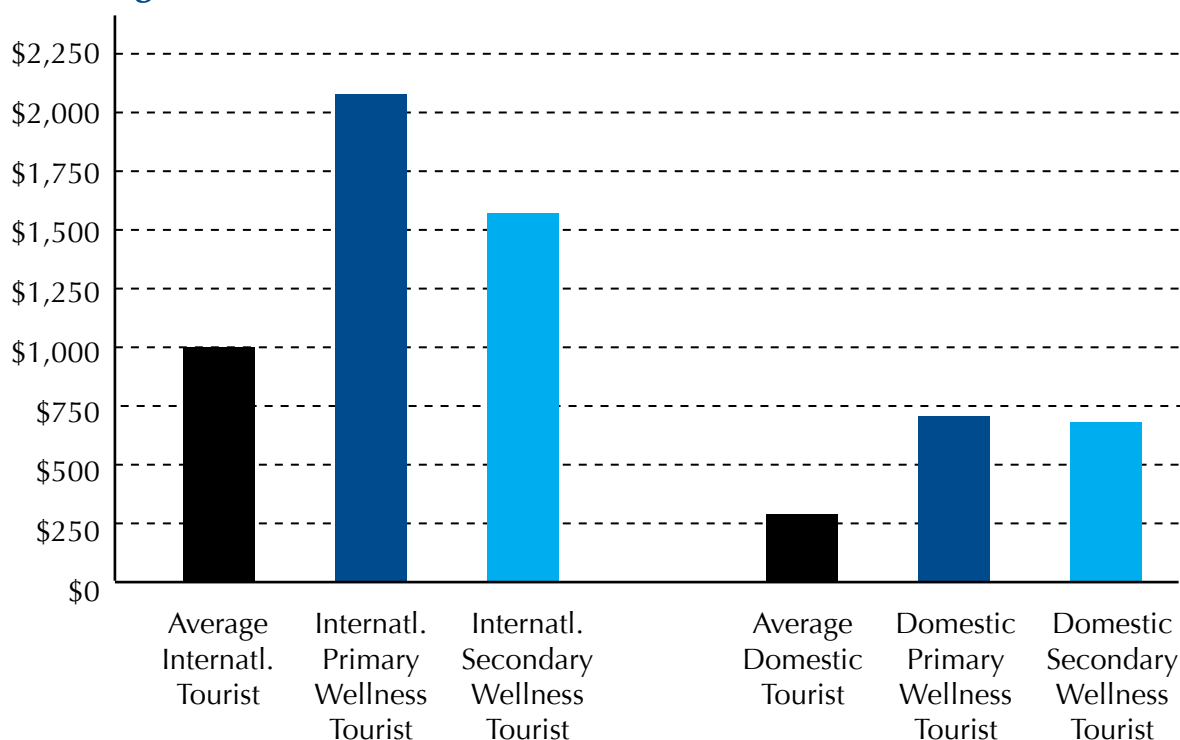
Characteristics Of Wellness Tourists

- Primary-purpose international wellness travelers represent the smallest segment, but they spend more per trip (\$2066).
- Secondary-purpose domestic wellness travelers constitute the largest segment, but they spend less per trip (\$680).
- Wellness tourists currently tend to be middle-aged, wealthy, educated, and from Western and/or industrialized countries.
- The top source countries for outbound international wellness travelers are currently in Europe and North America.
- Future wellness tourism growth will be driven by countries and consumers in Asia, Middle East, and Latin America.

An international wellness tourist spends about 65% more per trip than the average international tourist.

A domestic wellness tourist spends about 150% more per trip than the average domestic tourist.

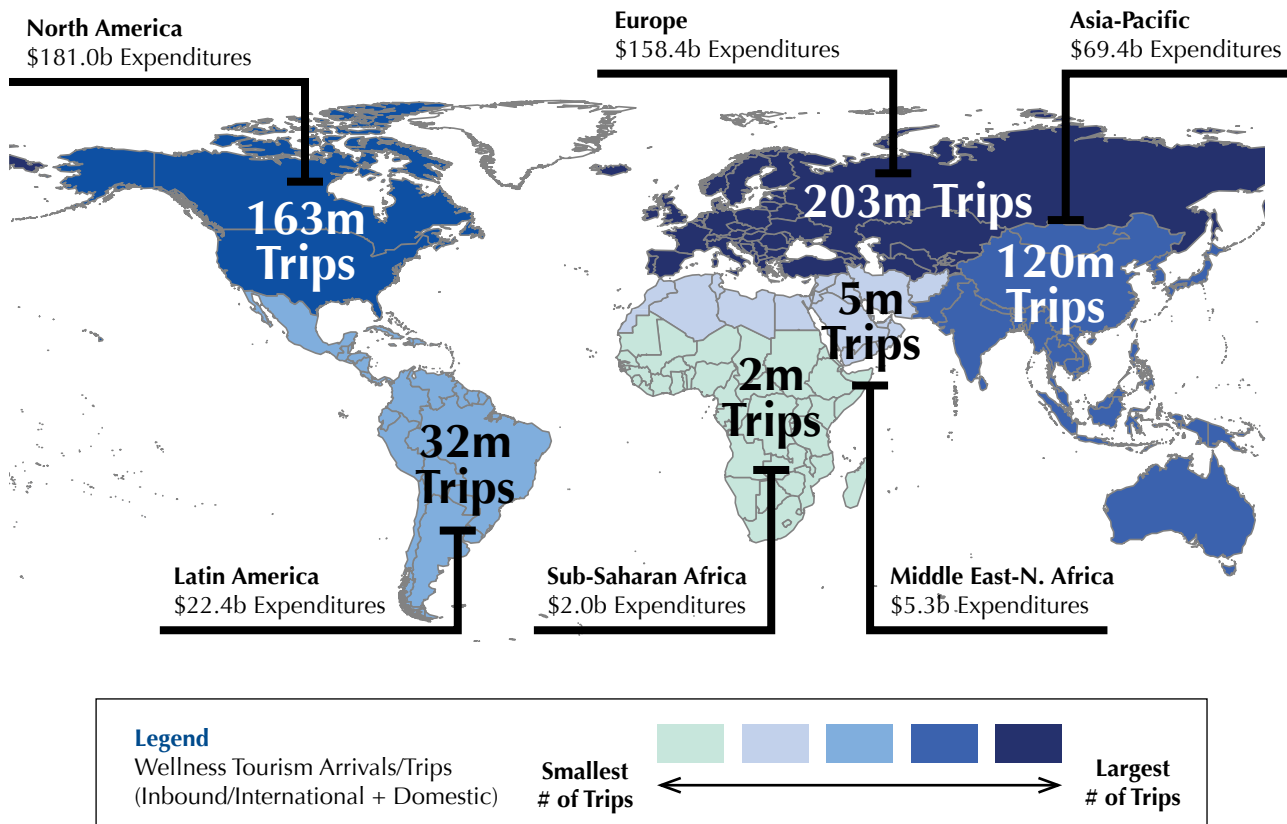
Wellness tourists are “high-yield” tourists, spending 130% more than the average tourist.



Source: SRI International for wellness tourism data; Euromonitor for general tourism data.

Wellness Tourism By Region

Combined international/inbound and domestic wellness trips in each region, 2012

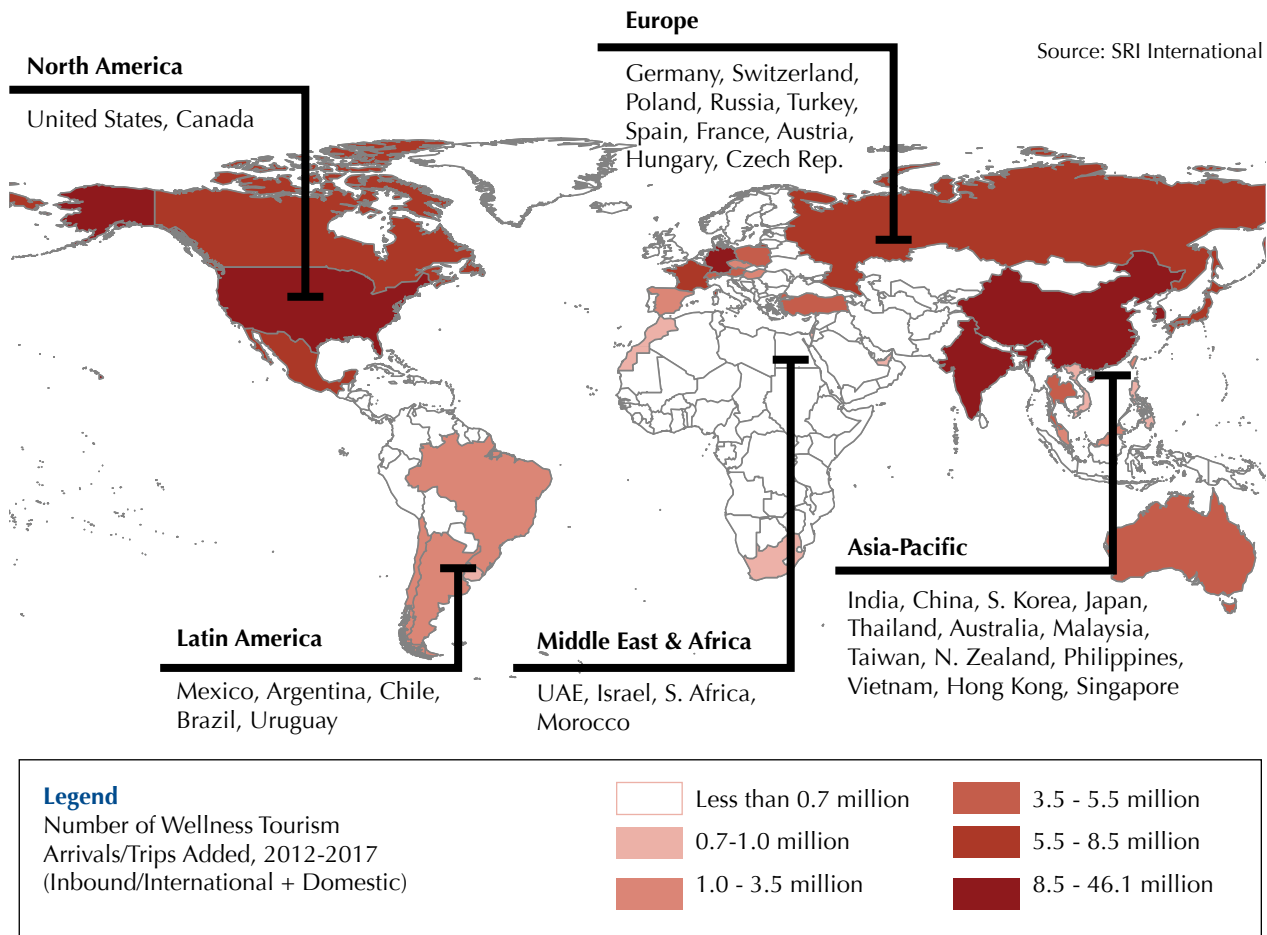


- The top five countries (United States, Germany, Japan, France, Austria) account for over half of the market (63% of expenditures).
- Among the world's top twenty countries for inbound/international and domestic wellness tourism (in terms of combined market size), over half are in Europe.
- Countries that receive the most inbound international wellness tourism arrivals: United States, France, Austria, Germany, Switzerland.
- Countries that have the most domestic wellness tourism trips: United States, Germany, Japan, China, France.
- Fifteen countries account for 75-85% of outbound international wellness trips, led by Europe, North America, and wealthier/developed Asian countries.

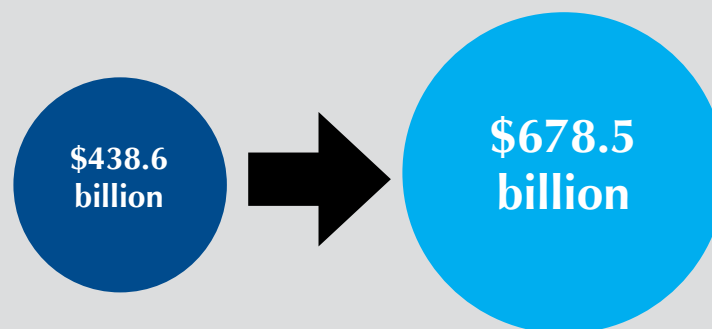
Source: SRI International

The Future of Wellness Tourism

Top countries for growth in inbound/international and domestic wellness trips, 2012-2017

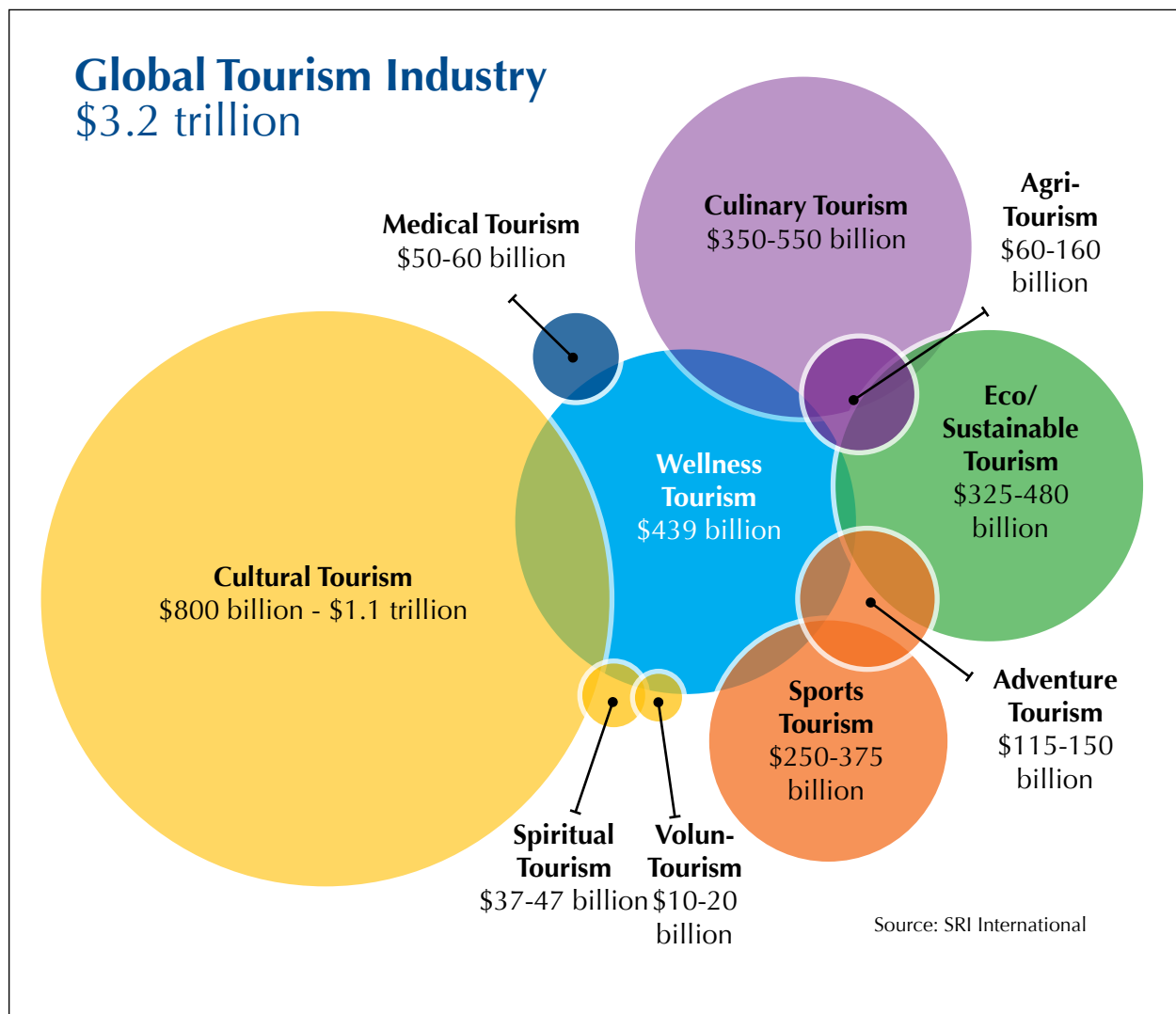


Over half of the projected growth in wellness tourism trips through 2017 will take place in Asia, Latin America, and the Middle East/North Africa.



Wellness tourism is projected to grow by **9.1%** annually through 2017, a growth rate that is nearly **50% higher** than that of overall global tourism.

Wellness tourism has synergy with many high-growth niche segments

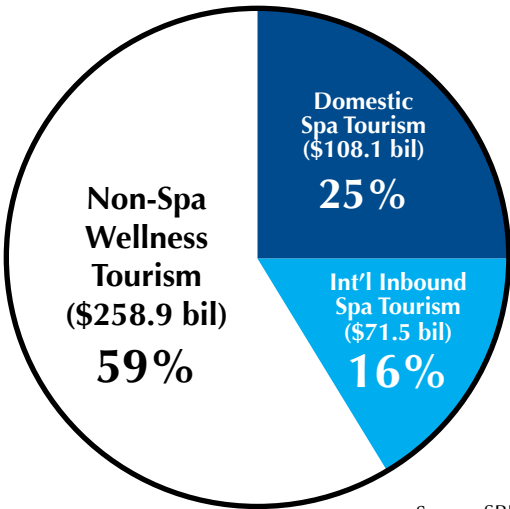


Niche tourism, or special interest tourism, has long been a growing global phenomenon. Wellness tourism shares many commonalities with other niche tourism segments, including overlapping traveler motivations and interests. A “secondary purpose” wellness tourist may be

simultaneously engaging in adventure tourism, culinary tourism, or eco-tourism. We estimate that international and domestic wellness tourism is similar in size to eco/sustainable tourism and culinary tourism.

Spa Tourism & Wellness Tourism

- Spa is a core business within wellness tourism and accounts for a significant portion of the wellness tourism economy.
- In 2012, spa tourism represented a \$179.7 billion market, with 224.9 million spa trips made both internationally and domestically.
- In 2007, SRI International estimated spa tourism at \$106.0 billion, with 142 million spa trips. This represents 11.1% average annual growth in spa tourism expenditures over the last 5 years, and 9.6% average annual growth in the number of spa trips.
- Non-spa wellness tourism expenditures are made by tourists in many other types of wellness-specific and “generic” activities and businesses, as presented on Pages iii



Source: SRI Int.

Spa tourism represents about 41% of wellness tourism expenditures.

and v, including healthy hotels, fitness, yoga, retreats, preventive health checkups, lodging, restaurants, retail, and so on.

Wellness tourism is different from, and larger than, medical tourism.

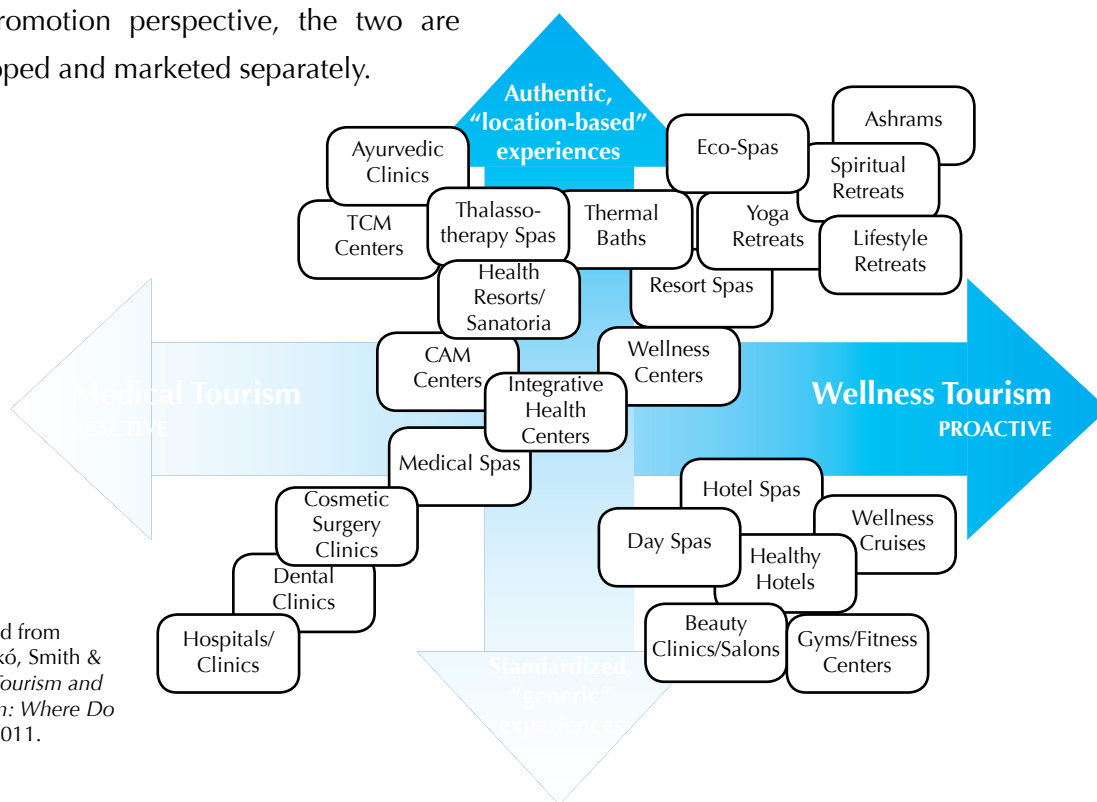
REACTIVE	Medical Paradigm	Wellness Paradigm	PROACTIVE
	\$50-60 billion intl. inbound	\$139 billion intl. inbound	
	Generally people who are sick.	Generally people who are healthy.	
	Travel to receive treatment for a diagnosed disease, ailment, or condition, or to seek enhancement.	Travel to maintain, manage, or improve health and well-being .	
	Motivated by desire for lower cost of care, higher quality care, better access to care, and/or care not available at home.	Motivated by desire for healthy living, disease prevention, stress reduction, management of poor lifestyle habits, and/or authentic experience.	
	Activities are reactive to illnesses, medically necessary, invasive, and/or overseen by a medical doctor.	Activities are proactive, voluntary, non-invasive, and non-medical in nature.	

Medical tourism and wellness tourism are fundamentally different activities that meet different traveler or patient needs. The conditions and factors that make a destination successful in either type of tourism are also very different. The distinction between medical tourism and wellness tourism is best understood by applying the concept of the “continuum of health” (see Page iii and below). Inconsistent use of these terms, as well as attempts to market medical tourism and wellness tourism together, have led to confusion among industry, governments, and consumers alike – to the detriment of both sectors. In fact, it is best to avoid using vague terminology such as “health tourism,” since it is not clear whether this term refers to medical tourism or wellness tourism, or is casually linking the two. While there are areas of overlap, cross-marketing must be pursued carefully to target specific consumer markets. From a policy and industry promotion perspective, the two are best developed and marketed separately.

Conventional medicine is beginning to embrace preventive and alternative approaches to care.

The overlap between wellness tourism and medical tourism occurs around activities toward the middle of the health continuum, such as thalassotherapy, thermal baths, health resorts, sanatoria, medical spas, DNA testing, and executive checkups – activities that can be both preventive and curative.

As the conventional medical industry increasingly turns toward preventive, alternative, and traditional approaches in order to deliver more effective care and improve costs – and as the scientific evidence base for alternative and wellness-oriented therapies grows – the lines between medical tourism and wellness tourism will in some instances blur.



Graphic adapted from Johnston, Puczkó, Smith & Ellis, *Wellness Tourism and Medical Tourism: Where Do Spas Fit?* May 2011.

Key Messages About Wellness Tourism

1	Well-Positioned Wellness tourism is riding a wave of demographic and lifestyle trends that is putting proactive health, mindfulness, and prevention at the center of consumer decision-making.
2	Preventive and Proactive Wellness tourism and medical tourism occupy distinct yet complementary spaces, meeting consumer needs along the vast health continuum.
3	High-Yield Domestic wellness tourism represents a large opportunity that can be leveraged to attract higher-spending international tourists.
4	Think Local Locally-rooted offerings are a key differentiator to attract travelers who seek authentic, place-based experiences.
5	Healthy Hotels To Hospitals New and varied business models are emerging to meet the wellness needs of travelers.
6	Government Support Governments are recognizing the wide commercial benefits of wellness tourism, as well its impact on the health of their economy and their citizens.

A wide variety of private and public sector entities have a stake in wellness tourism and can partner together to advance these opportunities.



The Global Wellness Tourism Economy

Full Report

OCTOBER 2013



I. Introduction

Wellness tourism represents the intersection of a powerful lifestyle trend and a growing global industry.

As one of the world's largest industries, tourism directly accounts for 100 million jobs worldwide. Its economic impact supports 9% of global GDP (\$6.6 trillion in 2012, according to the World Travel & Tourism Council). The rise of the global middle class – and the basic contemporary human need to rest, de-stress, and experience other places and cultures – continues to fuel an industry whose worldwide growth has surpassed that of other major industries such as manufacturing, financial services, and retail. ¹

At the same time, the increasing prevalence of unhealthy lifestyles and chronic diseases, as well as the failures of the conventional medical system to mitigate them and control runaway costs, are drawing attention to the need for more proactive and holistic ways to maintain and improve personal well-being. These and other global demographic, lifestyle, and health trends are driving the growth of a global wellness industry, which was estimated as a nearly \$2 trillion global market in 2010. ²

As a result, wellness tourism is uniquely positioned at the profitable intersection between the rising wellness industry and the world's massive tourism economy. As consumers increasingly integrate wellness-focused principles into their lifestyles, they also bring these interests with them when they travel. Many stakeholders – spas, hospitality and tourism businesses, governments, and countries and regions – stand to benefit from this opportunity.

Why Study Wellness Tourism?

- Tourism is one of the world's largest and fastest-growing industries.
- Wellness is a strong consumer trend.
- Wellness tourism is growing faster than the overall tourism industry.
- Wellness tourists are high-yield tourists who bring greater economic impacts.
- Any type of tourist (leisure or business, domestic or international) can also be a wellness tourist.
- Wellness tourism can take place in any destination, any type of business, and any season.
- Wellness tourism can support preservation of traditional culture and natural assets, and can also stimulate entrepreneurship.
- Wellness tourism brings in revenues, creates jobs, and may help improve the well-being of the general population.

¹ WTTC, Travel & Tourism Economic Impact 2013, www.wttc.org/site_media/uploads/downloads/world2013_1.pdf.

² SRI International, Spas & the Global Wellness Market: Synergies & Opportunities, May 2010, www.globalspaandwellnesssummit.org/images/stories/pdf/gss_spasandwellnessreport_final.pdf.

This report defines wellness tourism and estimates the size of the global wellness tourism economy and the opportunities associated with it.

While wellness tourism is increasingly recognized as offering both business investment and economic development opportunities, it is a relatively new market that has not yet been well-defined or studied. In fact, there has been confusion in describing this market, such as conflating wellness tourism with other important travel segments such as medical tourism.

The Global Spa & Wellness Summit (GSWS) has commissioned this study to explore wellness tourism and understand its broad global impacts.

The study seeks to accomplish the following:

- Define wellness tourism and the traveler characteristics, motivations, activities, and businesses associated with it.
- Measure the size of wellness tourism and its projected growth, as well as estimate its economic impacts.
- Encourage further investigation of wellness tourism as an important component of national, regional, and global tourism industries.
- Discover how the spa industry can take a leadership role in the wellness tourism marketplace, and advance partnerships that will help foster industry growth.

Research Scope And Methodology

The analysis and data presented in this report are based upon extensive primary and secondary research conducted by SRI International from January to August 2013. Research included a review of recent literature and reports on wellness, wellness tourism, and the tourism industry in general, along with telephone interviews with spa, wellness, and tourism stakeholders around the world.

While a small handful of countries collect data on spa tourism, or on the number of tourist visits to spas, wellness hotels, thermal baths, or related establishments, at this point in time there is no reliable data available on wellness tourism in any country around the world (particularly given the fact that there is not even an established definition for what wellness tourism is). Therefore, the estimates presented here on the size of the wellness tourism economy were developed by SRI International based upon our research and economic modeling techniques. The development of these estimates drew upon global spa industry data developed by SRI International for the Global Spa & Wellness Summit; country-level tourism industry data gathered from Euromonitor, World Travel & Tourism Council (WTTC), World Tourism Organization (UNWTO), and other sources; country-level socioeconomic and demographic data; and qualitative inputs gathered through interviews and research.

II. Analytical Framework: Defining Wellness Tourism

Before one can estimate the size of the global wellness tourism economy, one must first define wellness and who wellness tourists are. Tourism ministries, hospitality companies, spa companies, tour operators, and others – recognizing a new opportunity – are increasingly promoting wellness-focused destinations, activities, and services; however, to date there has been no consistent definition of the tourists engaging in wellness travel, where are they going, and what interests or motivates them. This section aims to provide clarity on these topics, so that wellness tourism can be measured in a systematic manner.

What Is Wellness?

The word “wellness” entered the mainstream lexicon in the 1970s and has dramatically grown in popularity over the last 10-15 years. Still only hazily understood by most consumers, in popular usage the term can be applied to anything that makes one feel good or that is “healthy.” Starting with a seminal, but little known book published by Dr. Halbert Dunn in 1961, titled *High-Level Wellness*, the writings and leadership of an informal network of physicians and thinkers in the United States have largely shaped the way we conceptualize and talk about wellness today. As a result, the modern concept of wellness is very much rooted in the Western (U.S. and European) traditions and may not be well understood in other parts of the world. However, the tenets underlying wellness can be traced to the ancient civilizations of Asia, Greece, and Rome.

Despite some confusion about the use of the term

“wellness,” its rising popularity and significance are not disputed. People are unwell, and increasingly so. Aging populations, an alarming rise in chronic disease and unhealthy lifestyles, failing medical systems with rising costs, and the stress associated with the modern lifestyle are all driving a mounting global health crisis. While these challenges are already pervasive in developed world, they are also rapidly rising in developing countries as people grow more wealthy, urbanized, and sedentary, and as they increasingly adopt Western lifestyles and products.

Many consumers are fighting back, seeking better ways to take care of themselves, actively making lifestyle changes, and taking greater responsibility for maintaining good health. This trend is driving the emergence of a wellness industry – broadly including complementary and alternative medicine, nutrition and weight-loss,

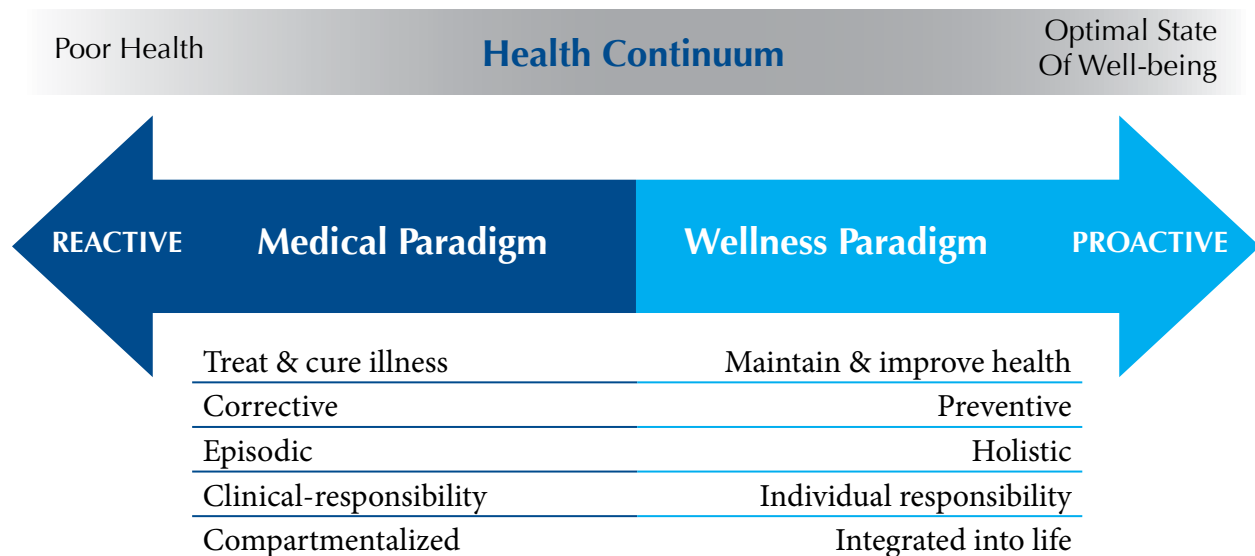
spa, fitness and mind-body activities, beauty and anti-aging, preventive and personalized health, and wellness tourism.

Wellness-minded consumers, who are increasingly integrating healthy activities into their lifestyles (e.g., exercise, nutritious foods, meditation, etc.), are also pursuing these interests when they travel.

Defining Wellness

Consistent with the World Health Organization's definition of "health," this study defines wellness as a state of complete physical, mental, and social well-being.³ It goes beyond mere freedom from disease or infirmity, emphasizing proactive maintenance and improvement of health and well-being.

Wellness is best understood on a continuum, which stretches from poor health on one end to a state of optimal well-being on the other end.⁴ Medicine and wellness are two approaches on this continuum. The medical paradigm is primarily reactive, focusing on treating patients who are already ill. This care is provided by doctors and clinicians, and the interaction between patients and providers is episodic. By contrast, the wellness paradigm is proactive, voluntary, and driven by self-responsibility. An individual chooses to adopt activities and lifestyles that prevent disease, improve health, enhance quality of life, and bring him/her closer to an optimal state of well-being.



³ Preamble to the Constitution of the WHO, www.who.int/about/definition/en/print.html. The WHO also added a very expansive definition of the word "wellness" to its Health Promotion Glossary in 2006: "Wellness is the optimal state of health of individuals and groups. There are two focal concerns: the realization of the fullest potential of an individual physically, psychologically, socially, spiritually and economically, and the fulfilment of one's role expectations in the family, community, place of worship, workplace and other settings. See: www.who.int/healthpromotion/about/HP%20Glossary%20in%20HPI.pdf.

⁴ The continuum concept is adapted from Dr. Jack Travis' Illness-Wellness Continuum. Travis was one of the pioneers of the modern wellness movement in the late-1970s.

Why Is Wellness Important To People, Business, & Government?



Worldwide obesity has nearly doubled since 1980.⁵



Over half the global business population has experienced an appreciable rise in workplace stress in recent years.⁸



Almost 10% of the world's adult population has diabetes.⁶



From 2002 to 2020, health spending in OECD countries will more than triple, to \$10 trillion.⁹



Chronic disease is responsible for 60% of deaths.⁷



From 2000 to 2050, the proportion of the world's population over 60 years will double.¹⁰

What Is Wellness Tourism?

Travel today can be bad for your health. Airport stress and transportation hassles; jet lag and poor sleeping; disruption of exercise routines; and excesses in eating, drinking, and sun exposure can leave a traveler more stressed and unwell after a trip. A recent Columbia University study of business travelers found that frequent and extensive travel can even increase cardiovascular risk factors, such as obesity, high blood pressure, and high cholesterol levels.¹¹

This is ironic because many people look forward to travel as an adventure and as an opportunity to rejuvenate and de-stress. In fact, when an SRI International survey asked consumers what they do to maintain or enhance wellness,

“take a vacation” was among the top five activities selected.¹² As more and more people pay attention to their health, they increasingly want to keep up their healthy habits when they travel. And a growing segment of travelers are even taking trips specifically focused on maintaining and improving their personal health and well-being. This is driving the growth of wellness tourism.

Although wellness tourism is a relatively new niche segment within the global travel and tourism industry, the practice of wellness-focused travel is not new. Since ancient times, people have visited the Dead Sea for its therapeutic properties. Romans traveled to baths, hot springs,

⁵ WHO, Fact Sheet: Obesity and overweight, March 2013, www.who.int/mediacentre/factsheets/fs311/en/index.html.

⁶ WHO, 10 Facts on the State of Global Health, July 2013, www.who.int/features/factfiles/global_burden/en/index.html.

⁷ WHO, 10 Facts about Chronic Disease, www.who.int/features/factfiles/chp/10_en.html.

⁸ Regus, Stress Out? A study of trends in workplace stress across the globe, November 2009, www.regus.com.au/images/Stress%20full%20report_FINAL_Designed_tcm78-21560.pdf.

⁹ PWC, HealthCast 2020: Creating a Sustainable Future, www.pwc.com/en_GX/gx/healthcare/healthcast-series-future-trends/assets/pwc-healthcast-2020-creating-a-sustainable-future.pdf.

¹⁰ WHO, Interesting facts about aging, March 2012, www.who.int/ageing/about/facts/en/index.html.

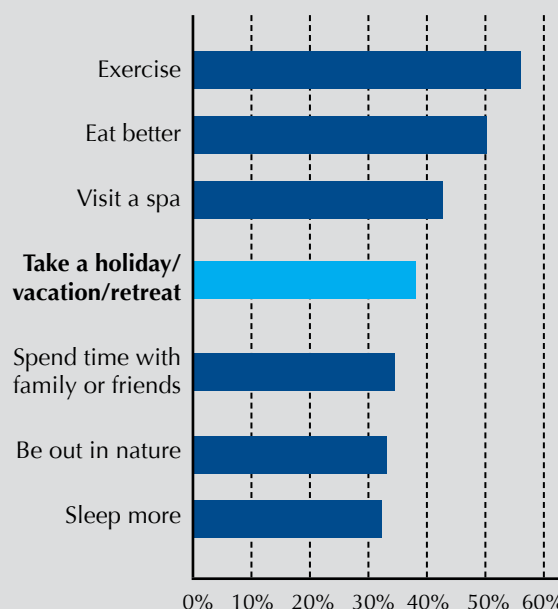
¹¹ Richards, Catherine A. and Rundle, Andrew G. “Business Travel and Self-rated Health, Obesity, and Cardiovascular Disease Risk Factors.” *Journal of Occupational & Environmental Medicine* 53.4 (2011): 358-363.

¹² SRI International survey of 1,077 consumers worldwide, conducted in 2010.

and seaside resorts for treatments, healthier climates, purification, and spiritual rituals. For 1,500 years, the Japanese have traveled to onsens for healing and community. Russia's first resort spa was constructed in Karelia nearly 300 years ago, in the era of Peter the Great. In spite of the rigors of travel in today's world, the act of travel itself has long been considered a wellness-enhancing activity.

People who take any kind of vacation for leisure, rest, and relaxation are, in one sense, engaging in wellness tourism. This broad definition, however, is not particularly useful for governments and businesses developing and promoting this niche segment and its offerings. Wellness tourism requires a definition that captures the broad motivations and characteristics of people engaging in this type of travel, so that industry stakeholders can understand and tap into the related opportunities.

When you are looking to enhance or maintain your personal wellness, what are you most likely to do?



Source: SRI International survey of 1,077 consumers worldwide, conducted in 2010.

Defining Wellness Tourism

There is much that is unwell about travel today. Wellness tourism is ***travel associated with the pursuit of maintaining or enhancing one's personal well-being.***

Unwell Travel



Unhealthy & over-eating



Travel stress



Excessive drinking



Poor sleeping



Disruption of fitness routine

Wellness Travel



Healthy living



Rejuvenation & relaxation



Meaning & connection



Authentic experiences



Disease prevention & management

Who Are Wellness Tourists?

Travelers vary widely in their level of interest in wellness, and in the extent to which they engage in wellness-related travel. While some may take a trip entirely for wellness purposes (primary purpose wellness tourism), others may want to engage in wellness-related activities as part of a trip (secondary purpose wellness tourism). This is consistent with SRI International’s definition of wellness consumers in the 2010 study on wellness, which places them along a continuum from periphery to core consumers (see chart on Page 11).¹³

Defining Wellness Tourists

For the purpose of measuring wellness tourism, **this study includes two segments of wellness tourists.** Both represent unique and important opportunities for businesses, tourism destinations, regions, and countries that want to attract this high-yield customer segment.

Primary Purpose Wellness Tourists	Secondary Purpose Wellness Tourists
Wellness is the sole purpose or motivating factor for their trip and destination choice.	Seek to maintain their wellness or participate in wellness experiences while taking any type of trip.
Examples	
<ul style="list-style-type: none">• Visiting a destination spa (such as Canyon Ranch, Rancho La Puerta, Chiva Som, Ananda, Gwinganna, Lanserhof, etc.)• Staying at an ashram for a meditation retreat• Taking a weekend spa trip for rejuvenation and stress reduction• Traveling to a wellness center for a full-scale executive health checkup• Taking a wellness cruise• Staying at an eco-spa or jungle spa resort for a week• Participating in a yoga retreat that includes healthy food, meditation etc. in a natural setting	<ul style="list-style-type: none">• A business or leisure traveler who actively seeks out healthy accommodations, food, and fitness options during a trip• A vacationer at a beach resort who wants to visit the spa and salon a few times during the trip• A cruise tourist who specifically selects a ship with extensive spa, beauty, and fitness amenities• An adventure tourist who visits an eco-spa after a long day of hiking or biking• A tour group traveler who gets a Thai massage or reflexology treatment, or visits a hammam, as part of the tour experience

¹³ See www.globalspaandwellnesssummit.org/images/stories/pdf/gss_spasandwellnessreport_final.pdf.

Wellness Travelers...

How does a wellness conscious consumer travel? At the core are the multidimensional values related to wellness, which span physical, spiritual, emotional, social and other dimensions. Motivated by these values, a wellness traveler may take part in many different kinds of activities during travel. These activities and businesses make up the diverse wellness tourism economy. They include not only spas, health resorts, baths, and springs, but also yoga studios and retreats, national parks, gyms and fitness centers, specialty restaurants, and complementary and alternative medicine (CAM) centers.



Wellness Tourists Reflect The Continuum Of Wellness Consumer Segments

Like wellness itself, consumer behaviors related to wellness can also be depicted on a continuum, evolving from reactive, sickness-oriented approaches to health (“periphery” wellness consumers) to proactive, prevention-focused, and holistic approaches to health (“mid-level” and “core” wellness consumers). On the left-hand side of the continuum, the periphery wellness consumers tend to have a one-dimensional relationship with health, focusing on specific health problems instead of drawing connections among different aspects of staying well. On the right-hand side of the continuum are the core wellness consumers, who embrace holistic and integrated approaches to health, as well as environmental and sustainability issues, recognizing that personal, social, and planetary well-being are all interconnected. As their values and lifestyles evolve, and with rising income, consumers will tend to move from the periphery toward the mid-level and core wellness segments.¹⁴

Primary purpose wellness tourists would generally fall into the core wellness consumer segment, with a genuine and proactive interest in maintaining a healthy lifestyle, seeking mental/spiritual balance, and being socially and environmentally conscious. Secondary purpose wellness tourists represent a much broader cross-section of the population and would tend to fall into the periphery or mid-level wellness consumer segments. Over time, people who engage in secondary wellness tourism may choose to take a primary purpose wellness trip, as their interest in and commitment to wellness grows (and as they evolve into mid-level and core wellness consumers).

Wellness Consumer Segments

REACTIVE & Self-Focused

PROACTIVE & Holistic-Focus

Periphery	Mid-Level	Core
<ul style="list-style-type: none"> • “Entry level” wellness consumers • Aspire to be more involved in wellness, but behaviors do not yet follow their aspirations • Reactive approaches to health, focusing more on acute medical conditions • Exercise for weight management • Avoid personal care products only if they cause sensitivities/allergies • Focus on avoiding “bad” food and ingredients 	<ul style="list-style-type: none"> • Moderately involved in a wellness lifestyle • Follow some trends set by core consumers • Somewhat preventive approaches to health • Exercise for health benefits • Avoid “toxic” personal care products in the home for health reasons • Focus on avoiding some “bad” foods but also seek whole, real foods. 	<ul style="list-style-type: none"> • Actively involved in a wellness lifestyle • Are trendsetters for other consumers • Highly preventive and holistic approach to health • Exercise for health and mental/spiritual balance • Avoid personal care products they believe are harmful to the environment • Focus on local/organic foods and social/environmental issues related to food production

¹⁴ See www.globalspaandwellnesssummit.org/images/stories/pdf/gss_spasandwellnessreport_final.pdf. Wellness consumer segments concept and graphic were adapted from Global Market Development Center (GMDC) and The Hartman Group, Consumer Shopping Habits for Wellness and Environmentally Conscious Lifestyles Study: Insights for Health, Beauty and Wellness, September 12, 2009, www.pacific.edu/Documents/school-pharmacy/acrobat/Consumer%20Shopping%20Habits%20for%20Wellness%20-%20Presentation.pdf.

What Is The Wellness Tourism Economy?

Measuring the size and economic impact of an industry is complicated and can be especially daunting for a segment that is not easily defined. Following international conventions for measuring tourism, **this study measures wellness tourism by aggregating the expenditures of people who are defined as wellness tourists, instead of aggregating activities of “wellness tourism industry businesses.”**

As elaborated on the next page, it is not possible to label certain types of businesses as “wellness tourism industry businesses” and then add up their activities to a wellness tourism economy figure.

A hotel spa, for example, has many types of guests – some are tourists, while some are local residents. It is very difficult to separate tourist spending and local spending within such an establishment. So although we would consider the hotel spa to be a “wellness tourism business,”

Defining The Wellness Tourism Economy

This study defines the wellness tourism economy as ***all expenditures made by tourists who seek to improve or maintain their well-being during or as a result of their trip.***

It includes two types of expenditures:

International Wellness Tourism Receipts	Domestic Wellness Tourism Expenditures
All receipts earned by a country from inbound wellness tourists visiting from abroad, with an overnight stay. ¹⁵	All expenditures in a country made by wellness tourists who are traveling within their own country of residence, with an overnight stay.

Wellness tourist spending is further broken down according to the following categories:

- Lodging
- Food & beverage
- Activities & excursions
- Shopping
- In-country transportation (travel within the country)¹⁶
- Other services (e.g., concierge services, telecommunications, travel agent services, travel insurance, etc.)

¹⁵ Following the conventions for calculation of international tourism statistics, we only include trips with an overnight stay in our calculations of wellness tourism. This ensures that the wellness tourism figures are comparable with general tourism data. Day-trips are typically defined and counted separately as “same-day visitors” or “excursionists” and are not included in the tourism data available from UNWTO, Euromonitor, WTTC and others.

¹⁶ Following the conventions for calculation of international tourism statistics, we purposely exclude international airfare from the calculation of wellness tourism. Standard international tourism data is calculated based on a balance of payments approach, whereby the expenditures made by an international tourist to a country are counted as a “receipt” or “credit” for that country. The international airfare paid by that international tourist does not necessarily accrue to the country he/she is visiting (e.g., a tourist from the United States traveling to China would likely purchase an airline ticket within the United States, and so that spending does not count as a tourism “receipt” for China). Therefore, international airfare is not counted within tourism data, and is instead counted in a different line-item in balance of payments statistics. Therefore, we also exclude international airfare from the wellness tourism data presented in this report, so that this data can be directly compared with standard, publicly available international tourism statistics.

to count all of its revenues in a measurement of the wellness tourism economy would be over-counting.

A wellness tourist is likely to spend money in many types of establishments during a trip – restaurants, hotels, stores, taxicabs, hiring tour guides, etc. While we would not necessarily consider these businesses to be “wellness tourism industry businesses,” these expenditures by wellness tourists play an important role in the wellness tourism economy and to exclude them would be under-counting.

Challenges Of Measuring The Tourism Industry: Supply Side Versus Demand Side Approaches

According to the UNWTO, “tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.”

Tourism as an activity or an industry is especially challenging to measure because it does not fit our traditional understanding of how to measure industries. Typically, to measure the size of an industry, one would calculate revenues or output of all of the businesses within an industry. This is a supply side approach to industry measurement, because it depends upon the size of the businesses that are supplying the products and services of interest.

Tourism, by its very nature, does not fit with this approach. Essentially any type of business could be a part of the tourism industry if it sells goods or services to a tourist. However, these

businesses also sell to local residents, and that spending should not be counted as part of the tourism industry.

To get around this problem, we employ a demand side approach, which looks at the expenditures of the tourist taking the trip. Any and all spending by a person who fits the definition of a tourist is counted when measuring tourism, regardless of where those expenditures are made.

This demand side definition, using tourist expenditures to measure tourism, is the official approach used by the UNWTO and other tourism statistics agencies to define and measure the tourism industry.¹⁷

¹⁷ For more information on tourism statistics, see UNWTO, The Collection of Tourism Expenditure Statistics, 1995, pub.unwto.org/WebRoot/Store/Shops/Infoshop/Products/1034/1034-1.pdf. See also www.unwto.org/facts/menu.html, media.unwto.org/en/content/understanding-tourism-basic-glossary, and UNWTO/United Nations, International Recommendations for Tourism Statistics, 2008, unstats.un.org/unsd/tradeserv/irts%202008%20edited%20whitecover.pdf.

The graphic below summarizes the components of the wellness tourism economy. Note that since we define wellness tourism according to tourist expenditures, these expenditures may or may not be made in businesses or activities that one typically associates with wellness. For example, the lodging used by a wellness tourist may be a destination spa or a wellness retreat (something easily associated with wellness) or it may be at a traditional hotel or resort. Likewise, each other category of wellness tourist expenditures (food & beverage, shopping, etc.) has gradations of being “generic” or “wellness specific.” Transportation by nature is a relatively “generic” endeavor, and is not especially different just because it is used by a wellness tourist. However, all of these types of expenditures are part of the wellness tourism economy so long as they are made by a traveler whose primary or secondary trip purpose is to pursue wellness.

The Wellness Tourism Economy

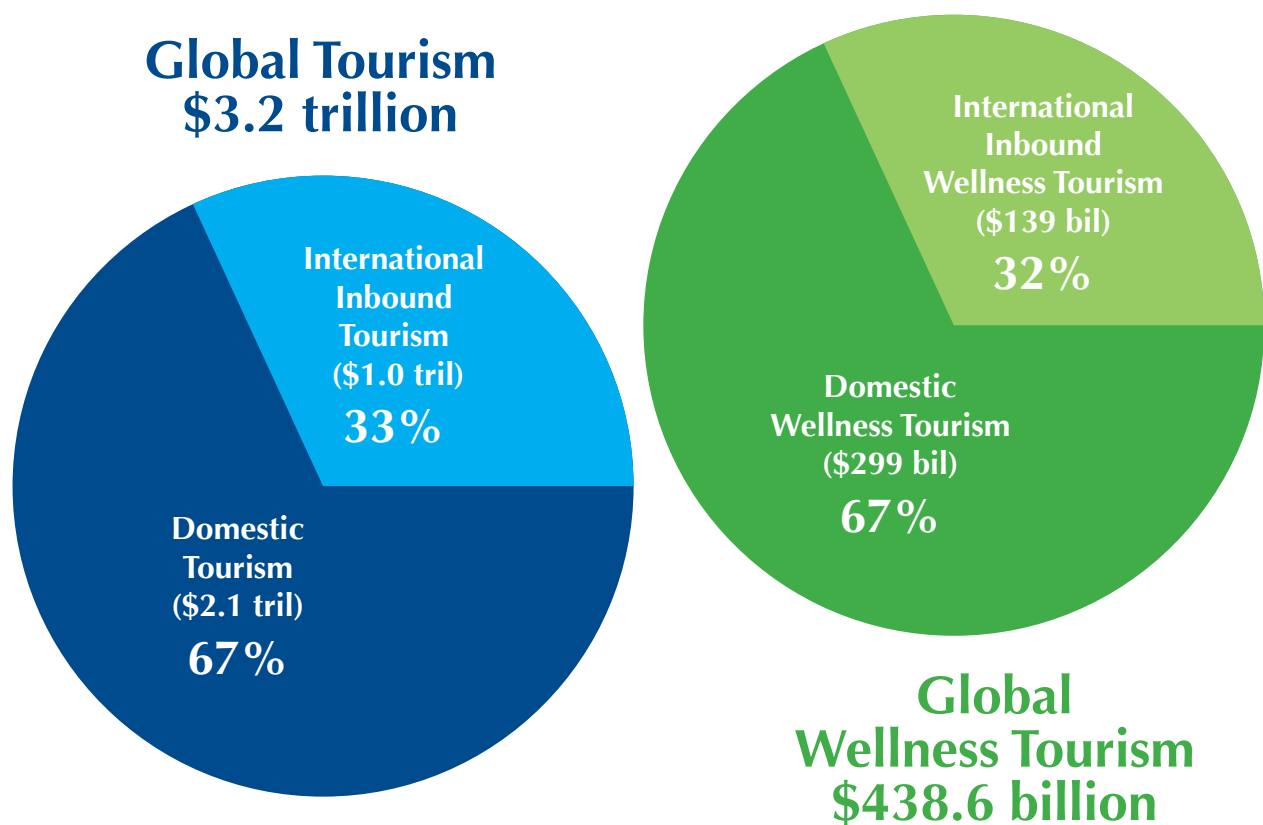


The examples provided in each sub-category are illustrative and not exhaustive.

III. Measuring The Wellness Tourism Economy

Wellness tourism is a \$438.6 billion global market, and a rapidly growing niche within the \$3.2 trillion global tourism economy.¹⁸

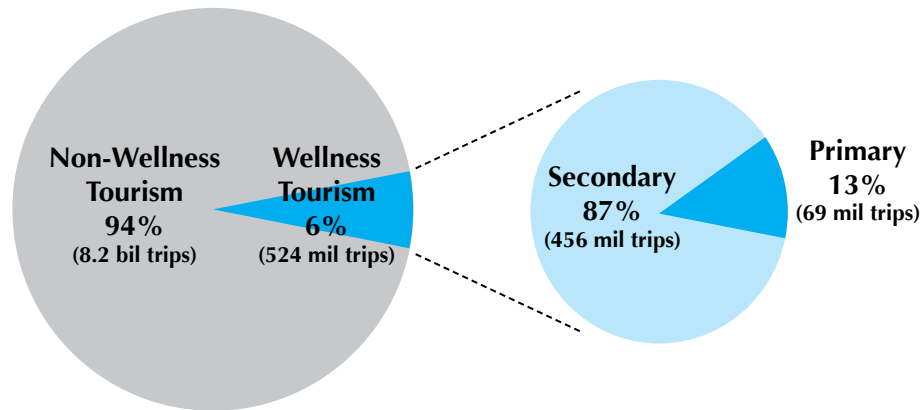
SRI International estimates that the total size of the wellness tourism economy in 2012 was \$438.6 billion, as shown in the chart to the right. This represents 524.4 million wellness tourism arrivals/trips taken both internationally and domestically in 2012.



Wellness Tourism As A Share Of Global Tourism (2012)

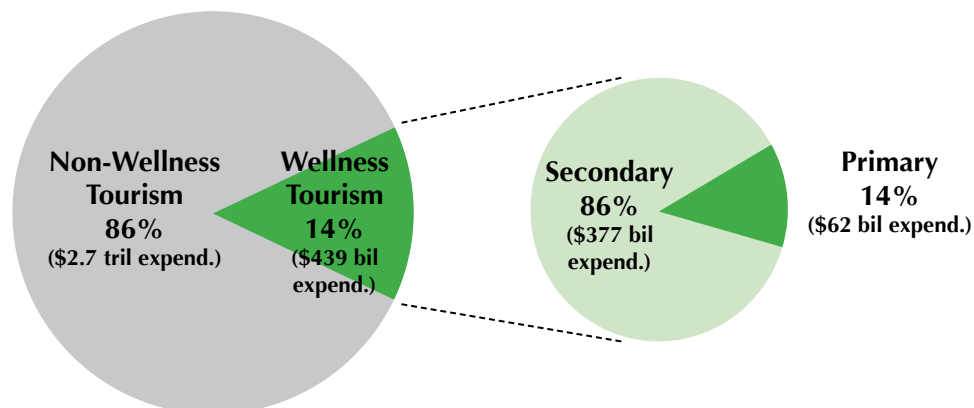
Arrivals/Trips

There were 8.7 billion total international & domestic tourism trips taken in 2012, and wellness tourism represents about 6% (524 million) of these trips.



Receipts/Expenditures

There were \$3.2 trillion in total international & domestic tourism expenditures in 2012, and wellness tourism accounts for about 14% (\$438.6 billion) of these expenditures.



¹⁸ Global Travel & Tourism data from Euromonitor International, www.euromonitor.com. All wellness tourism data presented in this section are estimates by SRI International.

The current wellness tourism market is concentrated in the top twenty countries, mainly in Europe and North America.

Among the world's top twenty countries for wellness tourism in terms of market size, over half are in Europe, along with the United States, Canada, and Mexico, and a handful of Asian countries (see table below). Europe's leading position in wellness tourism makes sense given Europeans' long history of travel for wellness, preventive, and therapeutic

Countries with the most DOMESTIC wellness tourism trips:

1. United States
2. Germany
3. Japan
4. China¹⁹
5. France

purposes (including sanatoria, bathing, sauna, thalassotherapy, and other natural and water-based treatments). Europeans travel extensively domestically, within Europe, and outside of Europe, and many of their trips have

a wellness as a primary or secondary focus (see Section IV for more detailed discussion of regional trends in wellness tourism).

Countries that receive the most INBOUND INTERNATIONAL wellness tourist arrivals:

1. United States
2. France
3. Austria
4. Germany
5. Switzerland

Twenty countries account for 88% of global wellness tourism expenditures in 2012. The top five countries alone (United States, Germany, Japan, France, Austria) account for over half of the market (63% of expenditures).

Top 20 Countries for Domestic and International Wellness Tourism Receipts/Expenditures (2012)

(\$ billions)		
1	United States	\$167.1
2	Germany	\$42.2
3	Japan	\$28.6
4	France	\$24.1
5	Austria	\$14.0
6	Canada	\$13.8
7	United Kingdom	\$12.3
8	Italy	\$11.7
9	Switzerland	\$11.4
10	Mexico	\$8.9
11	China	\$7.8
12	Spain	\$7.6
13	South Korea	\$5.6
14	Thailand	\$5.6
15	Australia	\$5.0
16	India	\$4.7
17	Russia	\$3.8
18	Portugal	\$3.4
19	Greece	\$3.3
20	Turkey	\$3.2

Figures include both international/inbound wellness tourism receipts and domestic wellness tourism expenditures, as well as both primary purpose and secondary purpose wellness tourism.

Estimates by SRI International.

¹⁹ The wellness market is still relatively new and emerging in China. While wellness tourism is estimated to account for only 3.6% of international arrivals to China and 0.9% of domestic trips within China, this still results in a huge number of wellness tourists because of the sheer volume of tourism in the country. See Section IV for additional discussion of China and the massive potential for wellness tourism in this market.

Types Of Wellness Tourism: Primary/Secondary & International/Domestic

As mentioned in the previous chapter, wellness tourism embraces both international and domestic components. In addition, there are two types of wellness tourists: “primary purpose” (tourists for whom wellness is the motivating factor for the trip and destination choice) and “secondary purpose” (tourists who seek wellness experiences as part of their trip).

“Primary purpose” wellness tourism is, by definition, a smaller segment than “secondary purpose” wellness tourism.

“Secondary purpose” accounts for 87% of wellness tourism trips and 86% of expenditures, while “Primary purpose” accounts for 13% of wellness tourism trips and 14% of expenditures.

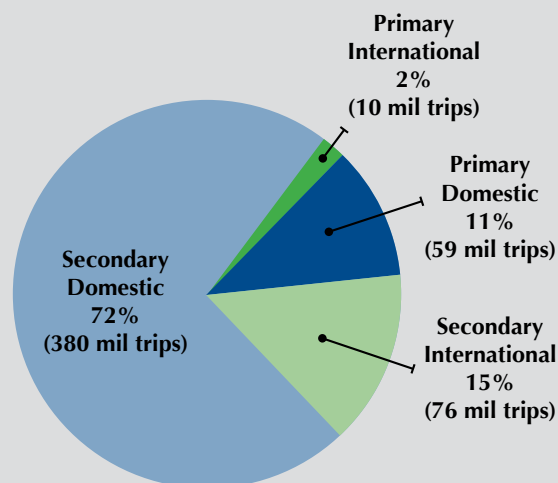
To devote time and resources to a trip that is entirely motivated by wellness as the primary purpose, a person must already possess a high level of interest in and commitment to personal health and well-being and also must have the means to devote to such an endeavor (as these trips tend to be expensive). This type of tourist would typically fall into the “core wellness consumer” group discussed in Section II. Conversely, “secondary purpose” wellness tourists represent a broad swath of the population and a broad range of types of trips, and would tend to be “periphery” or “mid-level wellness consumers” as described in Section II.

As an example of this phenomenon, American or European tourists who expend a great deal of time and money to fly to Thailand may be interested in a getting a Thai massage or visiting a destination spa like Chiva Som for a

Types of Wellness Tourism (2012)

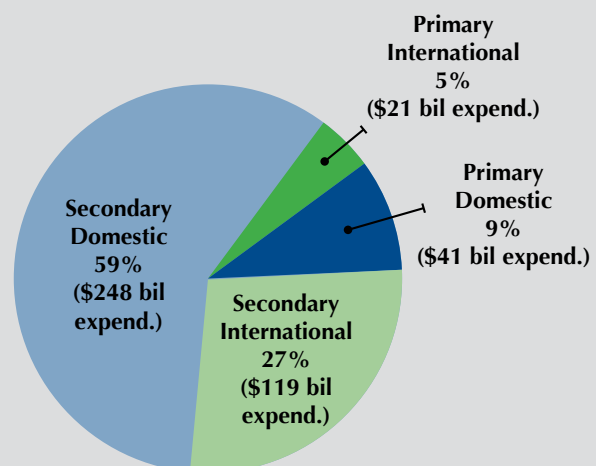
Arrivals/Trips

Secondary purpose domestic tourists constitute the largest segment of wellness tourists, but they spend the least per trip (\$680).



Receipts/Expenditures

Primary purpose international tourists are the smallest segment of wellness tourists, but they spend the most per trip (\$2066).



few days, but are also likely to pursue many other activities in the country (sightseeing and shopping in Bangkok, visiting temples in Chiang Mai, visiting the beach in Phuket, etc.). These “secondary purpose wellness tourists” are far more typical than a wealthy Asian or American flying to Thailand solely to spend one week at Chiva Som for detox and weight loss. Over time, as consumer interest in wellness grows, we expect the number of “primary purpose wellness tourists” to grow and an increasing number of “secondary purpose wellness tourists” to become interested in “primary purpose” wellness trips. For example, after taking a “secondary purpose” wellness trip to Thailand, the American or European tourist may choose to return to Thailand for a second trip primarily to stay at Chiva Som and engage in wellness activities.

The two segments are not static – people will, by definition, shift between the two groups for any given trip. For example, in one year a person may take a week-long trip to Chiva Som in Thailand (“primary purpose wellness tourist”), then take a business trip to New York City where he or she specifically selects to stay at a Westin or EVEN Hotel for its healthy cuisine, fitness facilities, and spa (“secondary purpose wellness tourist”), and then take a trip to London to visit family for the holidays (not a wellness tourist). Therefore, whether or not a person is a wellness tourist is defined by the motivations and characteristics of the specific trip being taken, and not necessarily by the characteristics of the person.

Both “primary purpose” and “secondary purpose” wellness tourists may travel internationally or domestically – and, in fact, domestic wellness tourism is much larger than international wellness tourism.

Domestic accounts for 84% of wellness tourism trips and 68% of expenditures, while international accounts for 16% of wellness tourism trips and 32% of expenditures.

For most people, it is easier and cheaper to travel domestically than overseas. In fact, overall domestic travel and tourism worldwide (7.7 billion trips in 2012) dwarfs international travel and tourism, with more than seven times the number of trips.²⁰ Likewise, people who travel for wellness (whether as a primary purpose or secondary purpose) are also far more likely to travel close to home or within their own country. This is especially the case in very large countries like the United States, Canada, or China, where traveling internationally is much more expensive and time-consuming. It is less true in Europe, where cross-border travel is easy and not much different from traveling from state-to-state within the United States.

²⁰ Travel and Tourism data from Euromonitor International, www.euromonitor.com.

Characteristics Of Wellness Tourists

Wellness tourists are “high-yield” tourists, spending 130% more than the average tourist.

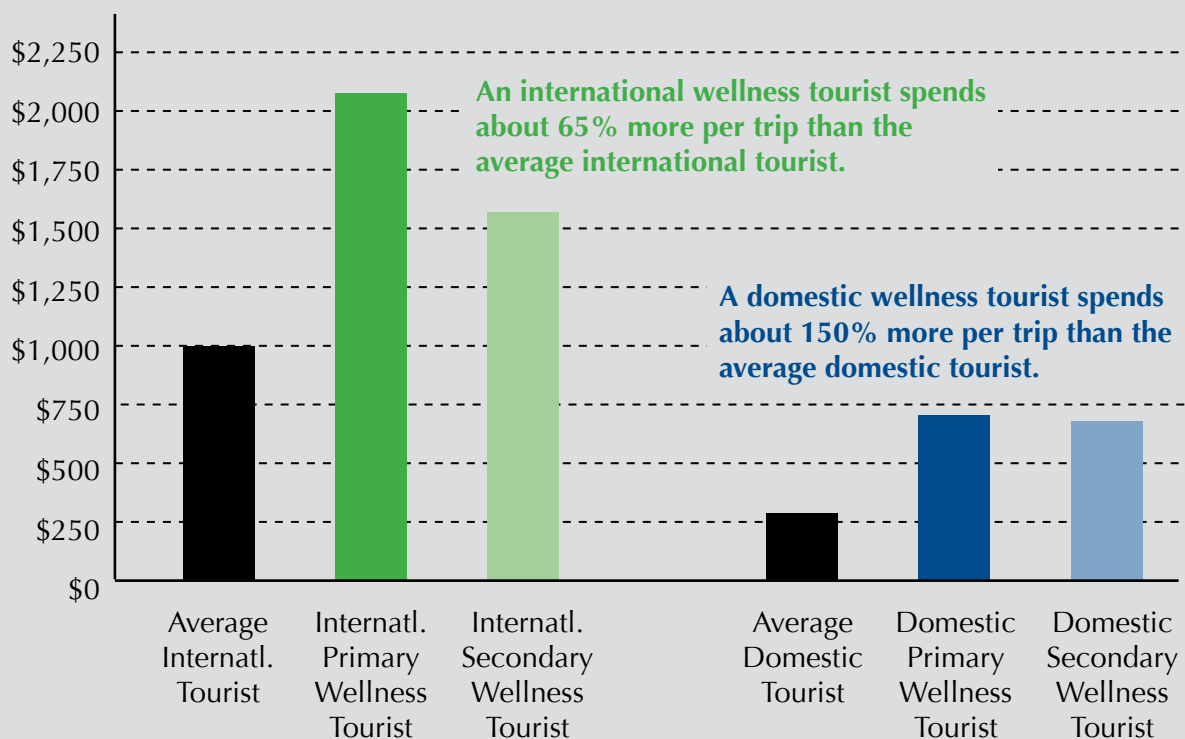
Wellness tourists spend more than the average tourist when they take a trip, bringing a greater economic impact to their destination.

Wellness tourists currently tend to be middle-aged, wealthy, educated, and from Western industrialized countries, but this demographic is rapidly changing.

As described in SRI International’s 2010 report on the global wellness market, the growth the modern wellness industry has largely

been driven by Baby Boomers from Western industrialized countries, and this segment of the population has been the largest purchaser of health- and wellness-related products and services, especially as they deal with the effects of aging.²¹ This trend is corroborated by wellness tourism businesses, who observe (anecdotally) that a large portion of their clientele fits this demographic. However, outbound and domestic wellness tourists from Asia, the Middle East, and Latin America are rapidly on the rise – especially as consumers in these nations enter the middle/upper classes, age, travel more, and develop increasing awareness of wellness. A

Wellness Tourism Spending (2012)



²¹ SRI International, Spas & the Global Wellness Market: Synergies & Opportunities, May 2010, www.globalspaandwellnesssummit.org/images/stories/pdf/gss_spasandwellnessreport_final.pdf.

significant portion of future wellness tourism growth can be expected to occur in these markets. Additionally, younger generations around the world have exhibited more interest in balanced and holistic lifestyles, greater cultural awareness, a more global viewpoint, and are more open to new experiences and alternative approaches to health. Younger consumers will also be important future drivers of wellness-related travel and tourism growth.

The top outbound source countries for international wellness tourism are currently in Europe and North America.

Twenty countries account for 84% of international outbound wellness tourism trips. European countries are especially important sources of wellness tourists (although a significant portion of these tourists are traveling to other countries within Europe), followed by North America, and high-income Asian countries.

Top 20 Countries for Domestic Wellness Tourism Receipts/Expenditures (2012)

		(millions)
1	Germany	19.4
2	United States	8.0
3	United Kingdom	6.0
4	Canada	5.9
5	France	5.3
6	Austria	4.1
7	Switzerland	4.1
8	Russia	3.9
9	Italy	1.8
10	Hong Kong	1.7
11	Netherlands	1.6
12	Japan	1.5
13	Sweden	1.2
14	Spain	1.1
15	S. Korea	1.0
16	Belgium	1.0
17	Singapore	0.9
18	China	0.8
19	Turkey	0.8
20	Denmark	0.8

Includes both primary purpose and secondary purpose wellness tourism.

Estimates by SRI International.

Wellness Tourism Economy Sub-Segments

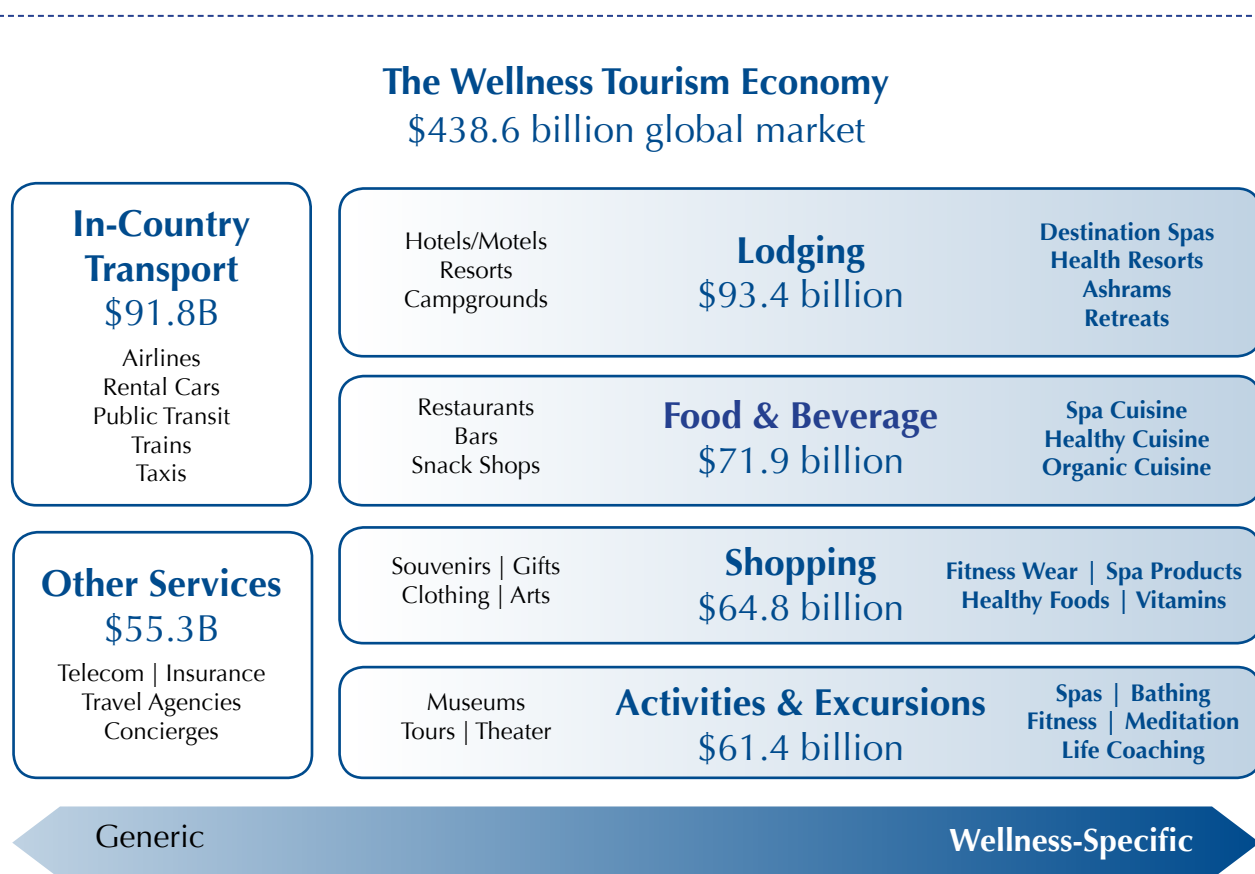
As with any other kind of tourist, wellness tourists spend money on a wide variety of goods and services during a trip. Their categories of spending represent the sub-segments of the wellness tourism economy, as illustrated in the graphic below. Within each sub-segment, some expenditures may include wellness-focused activities, services, and products (e.g., spa services, meditation classes, healthy cuisine) while other expenditures may be on generic items (e.g., a regular hotel room, a visit to a museum, a souvenir). As explained in *Section II*, all of these expenditures are included in the calculation of the size of the wellness tourism

economy, so long as they are made by a tourist whose primary or secondary trip purpose is to pursue wellness.

Spa Tourism Share Of Wellness Tourism

Many past studies on wellness tourism have treated wellness tourism and spa tourism as synonymous. As discussed in *Section II*, this study defines wellness tourism's scope as being far broader. Nonetheless, spa remains a central and core business within wellness tourism and accounts for a significant portion of the wellness tourism economy.

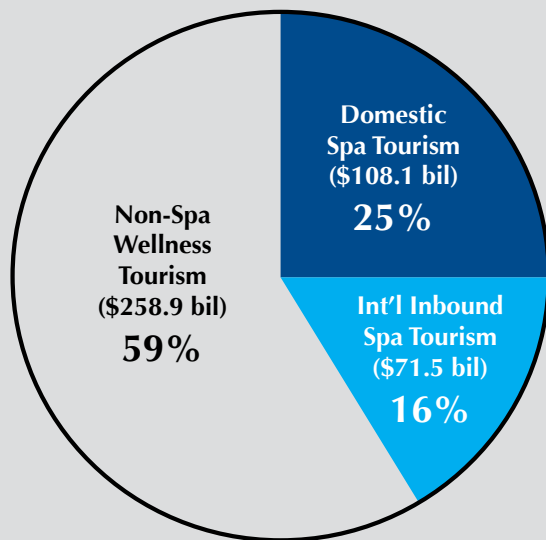
We estimate that in 2012 spa tourism represented a \$179.7 billion market, with 224.9 million spa



The examples provided in each sub-category are illustrative and not exhaustive. Source: SRI International

trips made both internationally and domestically. In 2007, SRI International estimated spa tourism at \$106.0 billion, with 142 million spa trips.²² This represents 11.1% average annual growth in spa tourism expenditures over the last 5 years, and 9.6% annual growth in the number of spa trips.

Spa tourism expenditures represent about 41% of the global wellness tourism economy.



Wellness Tourism Economy Growth Forecasts

Wellness tourism is projected to grow by 9.1% annually through 2017, a growth rate that is nearly 50% higher than that of overall global tourism.²³

Wellness tourism will grow rapidly over the coming years, responding to the rising consumer interest in wellness principles and lifestyle currently underway around the world.

Wellness tourism expenditures are projected to grow to \$678.5 billion in 2017, rising from 14% to 16% of the total global tourism market. Wellness tourism trips are projected to grow by 8.5% annually, to 790.3 million trips in 2017.

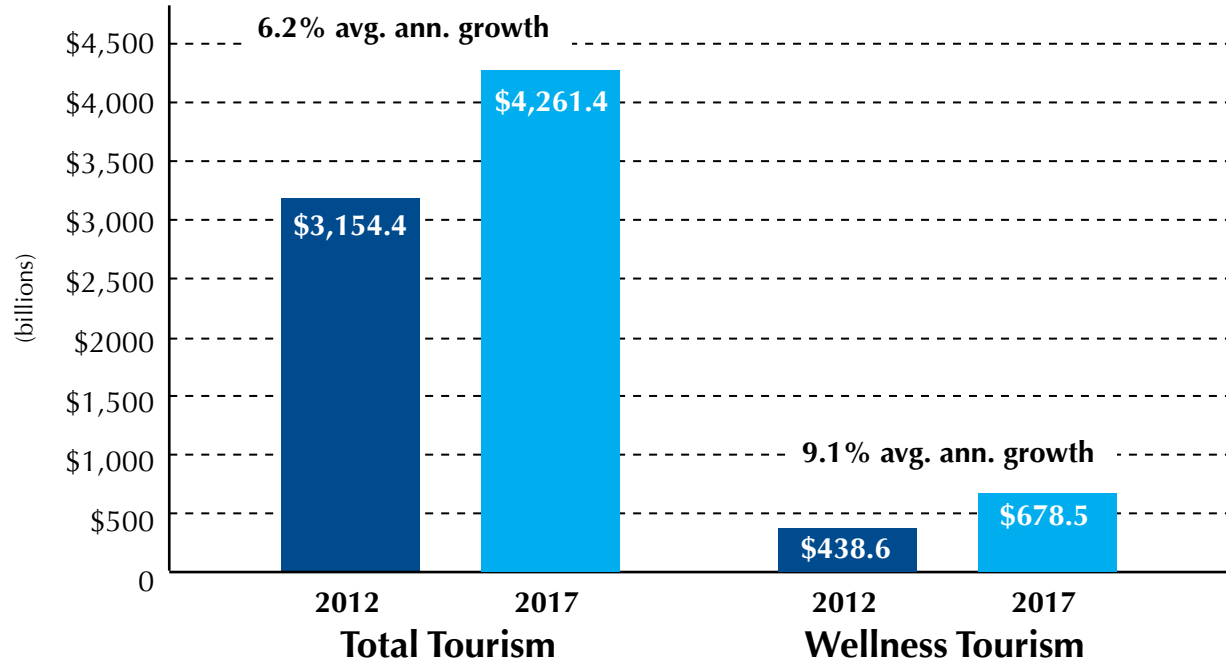
Future wellness tourism growth will be driven by countries in Asia, Middle East, and Latin America.

Growth is projected to be especially strong in developing markets, as rising prosperity, education, and urbanization in these countries bring a greater propensity to travel and a rapid adoption of modern wellness lifestyle and prevention-focused practices. Over half of the projected growth in wellness tourism trips through 2017 will take place in Asia, Latin America, and the Middle East/North Africa, driven by a dramatic increase in both domestic wellness tourism and intra-regional wellness tourism in these countries (as well as an increase in long-haul international tourists visiting these countries as they increasingly market and package wellness tourism options for overseas visitors).

²² See SRI International, *The Global Spa Economy 2007*, May 2008, www.globalspaandwellnesssummit.org/images/stories/pdf/gss.spa.economy.report.2008.pdf. Note that in SRI International's 2010 study, *Spas & the Global Wellness Market*, wellness tourism was presented as \$106 billion segment, as this figure was drawn from the spa tourism estimates in the 2008 report. Here, wellness tourism was equated with spa tourism because no other alternative definition was available at the time. The \$106 billion "wellness tourism" figure presented in SRI International's 2008 study should be compared with the \$179.7 billion spa tourism presented in this section (and not the larger \$438.6 billion figure for wellness tourism presented in this report), because these are definitionally equivalent.

²³ Growth projections are based on Travel and Tourism data from Euromonitor International, www.euromonitor.com.

Global Tourism and Wellness Tourism Growth (2012-2017)



Leading Countries For Wellness Tourism Growth (2012-2017)

	# of Wellness Arrivals/Trips Added (millions)	Average Annual Growth Rate		# of Wellness Arrivals/Trips Added (millions)	Average Annual Growth Rate
United States	46.1	5.8%	Spain	3.5	6.2%
India	36.0	22.1%	Brazil	2.7	8.7%
China	33.3	19.3%	Hungary	2.4	8.9%
S. Korea	19.2	15.3%	Czech Republic	2.1	8.9%
Germany	12.7	4.7%	Malaysia	2.0	12.8%
Russia	8.5	13.1%	Taiwan	1.7	13.0%
France	8.3	5.5%	Argentina	1.6	11.4%
Canada	7.4	6.0%	Uruguay	1.1	14.7%
Mexico	7.0	10.0%	UAE	1.0	17.9%
Japan	6.8	3.7%	South Africa	1.0	10.5%
Thailand	5.5	14.3%	Israel	0.8	18.6%
Switzerland	5.4	8.9%	Morocco	0.8	14.7%
Turkey	5.4	12.6%	New Zealand	0.8	6.7%
Austria	4.5	6.9%	Philippines	0.8	19.4%
Australia	4.3	15.2%	Vietnam	0.8	21.0%
Poland	4.1	12.4%	Hong Kong	0.7	9.3%
Chile	3.5	17.3%	Singapore	0.7	9.4%

Figures include both international/inbound wellness tourism arrivals and domestic wellness tourism trips, as well as both primary purpose and secondary purpose wellness tourism, and represent the overall increase from 2012-2017. Countries shown in this table were chosen by SRI based upon a combination of the country's overall increase in the # of arrivals/trips and the growth rate.

Wellness Tourism Economic Impact

Wellness tourism's impact on the global economy includes both the direct effects of tourist trips and expenditures, as well as their indirect and induced (or multiplier) effects on the overall economy.

In 2012, the \$438.6 billion in global wellness tourism expenditures generated 11.7 million direct jobs, and a total economic impact of \$1.3 trillion for the world economy.

Understanding The Multiplier Effect In The Tourism Industry

In economics, the idea of the multiplier is that changes in the level of economic activity in one industry have a "ripple effect" that results in an impact on many other industries throughout the economy. For example, a portion of each dollar spent at a hotel is then spent by the hotel owner to purchase goods and services (e.g., bed linens, cleaning supplies, etc.) for running the hotel facility. The producers of these goods and

services must, in turn, increase production – these are indirect effects. In addition, hotel employees spend much of their income purchasing goods and services, and this requires companies in a myriad of other industries to hire employees and increase output to meet this demand – these are induced effects.

Therefore, the total economic impact of a hotel includes both the employment and revenues of the hotel itself, as well as the employment and revenues generated in other sectors of the economy through subsequent purchases of goods and services by upstream and downstream businesses and employees.

The World Travel & Tourism Council performs economic impact analysis for the travel and tourism industry worldwide.²⁴ Multipliers used to conduct economic impact analysis for wellness tourism in this study were derived from WTTC's general tourism multipliers for countries around the world.

²⁴ See www.wttc.org/research/economic-impact-research/.

Economic Impact Of Global Wellness Tourism (2012)

	Wellness Tourism Direct Impact	Indirect & Induced Impacts	Wellness Tourism Economy-Wide Impact
Wellness Tourism Expenditures	\$438.6 billion	\$875.9 billion	\$1,314.5 billion
Wellness Tourism Employment	11.7 million jobs	15.8 million jobs	27.5 million jobs

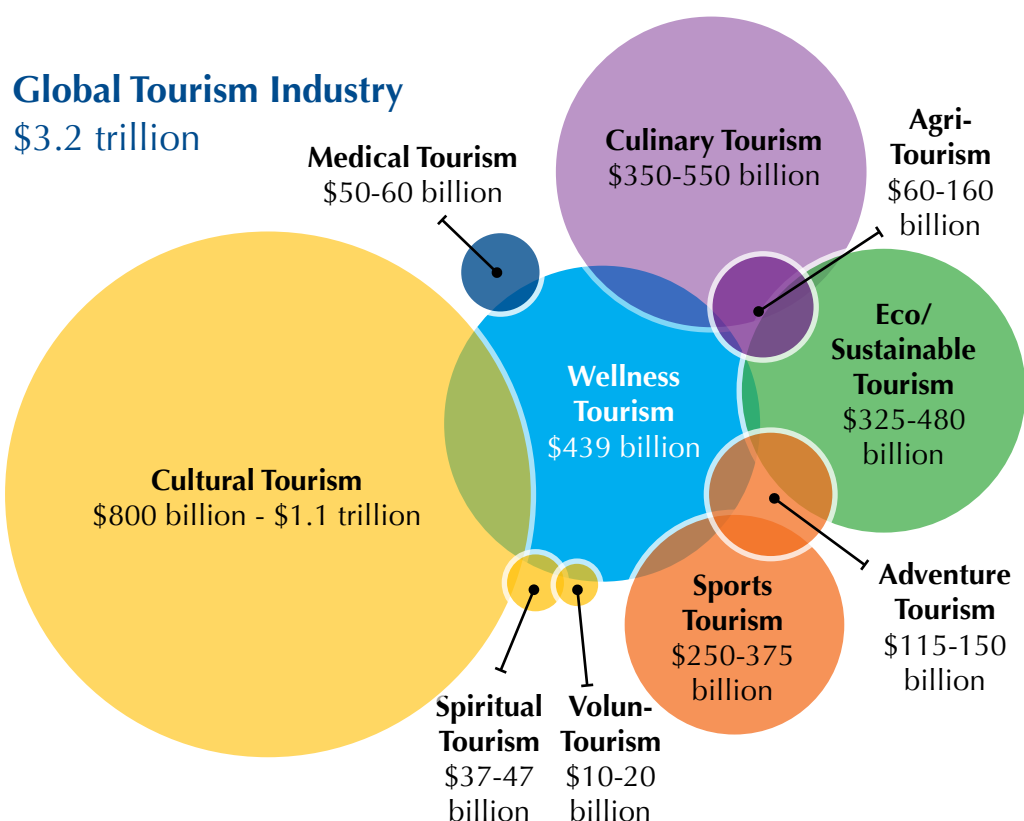
Estimates by SRI International, based on general travel & tourism multipliers from WTTC.

Wellness Tourism Compared To Other Niche Tourism Segments

Niche tourism, or special interest tourism, is a rapidly growing component within the global travel and tourism industry.²⁵ Wellness tourism shares many commonalities with a range of other niche tourism segments, including overlapping traveler motivations and interests. A “secondary purpose” wellness traveler may be simultaneously engaging in adventure tourism,

culinary tourism, or eco-tourism as a primary or secondary interest during the same trip. As shown in the graphic below, we estimate that international and domestic wellness tourism is similar in size to culinary tourism and eco/sustainable tourism and is much larger than medical tourism.²⁶

Wellness tourism overlaps and has synergy with many other high-growth niche tourism segments.



Note that the market size for Medical Tourism shown here includes only international/inbound tourism (as domestic tourism figures are not available). All other segments include both international and domestic tourism combined.

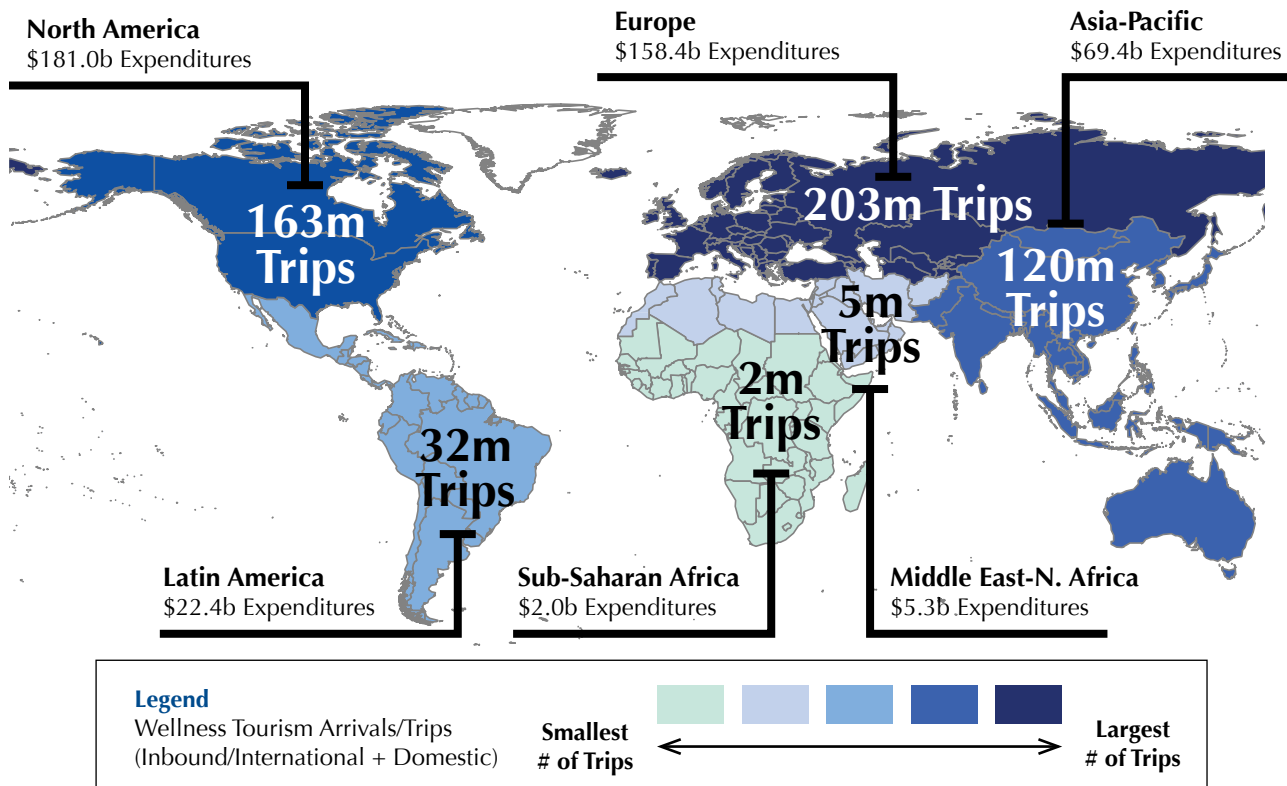
²⁵ Niche tourism is often defined in contrast to “mass tourism” and includes a wide variety of travel based upon special interests. Niche tourism is typically associated with a more sophisticated and differentiated set of traveler motivations, an interest in more meaningful and authentic experiences, higher spending patterns, smaller numbers of tourists, and greater sustainability for the destination. For more information on niche tourism, see: Marina Novelli, Ed., *Niche Tourism: Contemporary Issues, Trends and Cases*, Oxford: Elsevier Butterworth-Heinemann (2005).

²⁶ Estimates for the niche tourism segments shown here were developed by SRI International, drawing upon data from the following sources: GWU School of Business, Adventure Travel Trade Association, & Xola Consulting, *Adventure Tourism Market Report* (2010); International Culinary Travel Association, *TIA Online Culinary Survey of Leisure Travelers* (2006); Cultural & Heritage Tourism Alliance, *Cultural Heritage Tourism Website*; Mandala Research; WTTC/IFTO/IH&RA/ICCL, *Industry as a Partner for Sustainable Development* (2002); The International Ecotourism Society; World Religious Travel Association; Sport & Adventure Tourism Association; ATLAS Tourism Research & Marketing, *Volunteer tourism: A global analysis* (2008); USDA National Agricultural Statistics Service, *Measuring the Economic Impact of Agritourism on Farms* (2009); and others.

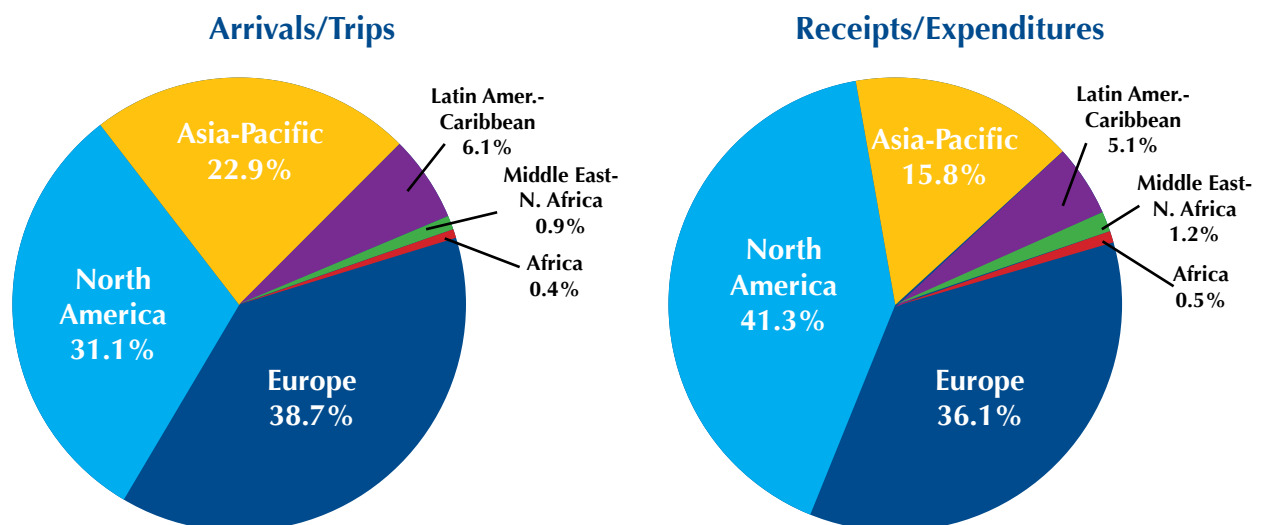
IV. Wellness Tourism Economy By Region

Wellness Tourism By Region

Combined international/inbound and domestic wellness trips in each region, 2012

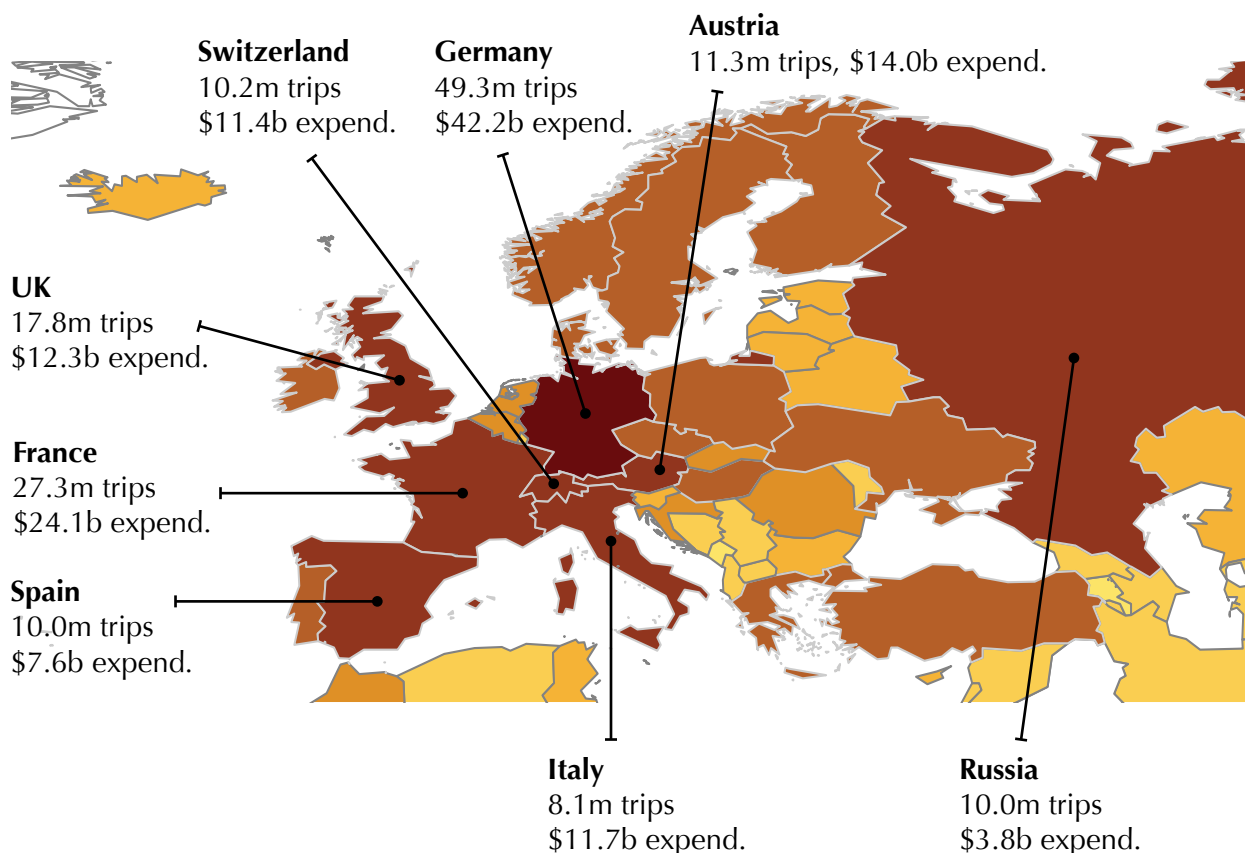


Combined international/inbound and domestic:



Europe

Europe Wellness Tourism Market Size & Impact (2012)



Arrivals/Trips: 202.7 million

Receipts/Expenditures: \$158.4 billion

Projected 5-year annual expenditures growth: 7.3%

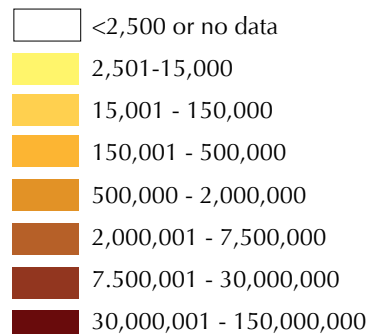
Direct jobs: 2.4 million

Total economic impact: \$451.7 billion

- Europe receives the highest number of wellness trips.
- Europe ranks second (after North America) for wellness tourism expenditures.
- Key inbound source markets: intra-Europe travel, North America, Gulf countries, and high-income Asian countries.
- Domestic tourism accounts for 77% of wellness tourism trips.

Legend

Wellness Tourism Arrivals/Trips
(Inbound/International + Domestic)



Europe: Wellness Tourism Market Trends

- European consumers have a sophisticated understanding of wellness and prevention, drawing from a long tradition of bathing, sauna, thalassotherapy, and other natural and water-based treatments.
- The term “wellness” does not resonate widely with all European consumers, as some tend to associate it with lighter, relaxing activities like getting a massage or spending time outdoors. “Well-being” is a more widely used term in the UK, while terms such as “medical wellness,” “health tourism,” and “holistic health” are also used to capture the broader and preventive aspects of wellness.
- Traveling extensively within their own countries and continent for wellness, Europeans are also probably the largest source market for international wellness travel. Due to the availability of high-quality, largely government-financed medical care provided in their home countries, Europeans are not as likely to travel overseas to receive healthcare.
- Countries such as Germany, Austria, Switzerland, Italy, and all of Eastern Europe have a centuries-old tradition of traveling for Kur which involves a variety of preventive, curative, therapeutic, and rehabilitative therapies related to thermal waters, hydrotherapy, massage, mud and algae treatments, etc. In some countries – such as Norway and Denmark – government financing or subsidization of this kind of travel is part of routine healthcare. This has contributed to the long-established wellness tourism market in Europe.
- Wellness tourism offerings in Europe tend to be more “democratized” than in other regions – with a variety of services at many price points. Today, 4- and 5-star hotels are generally expected to have spa and wellness facilities available to guests, and these offerings have become standard.
- As government subsidization has shrunk, some traditional sanatoriums, health resorts, and thermal medical facilities in Eastern and Central/Southern Europe have sought investment and modernization to broaden their appeal and are increasingly focusing on wellness tourism (especially trying to attract more international visitors). For example, traditional sanatoria in Sochi, Russia (a historic spa town) are now being modernized and converted to luxury spa hotels in anticipation of the 2014 Olympics. In Turkey, historic hammams are undergoing multi-million dollar restorations and reopening as tourist-focused facilities centers, while new five-star hotels and health clubs are including hammam-style facilities within their luxury spa and wellness centers.
- In a few countries (notably Switzerland, Austria, Germany, Hungary, Finland, Slovenia), tourism ministries/organizations are actively promoting and packaging wellness tourism and spa tourism offerings.

Other European countries are not yet actively promoting the sector, although many have strong wellness assets and local traditions to draw upon.

- Another unique approach in Europe is the packaging and branding of regional wellness traditions, such as Nordic Wellbeing and Alpine Wellness, although this is largely taking place through private sector-based initiatives.

- As noted, more than three-quarters of European wellness travelers are domestic. Promoting wellness tourism to international markets may help to counter the cyclical nature of wellness businesses who cater mostly to domestic visitors, and may also help boost the service standards of traditional, domestically-oriented wellness destinations and businesses.

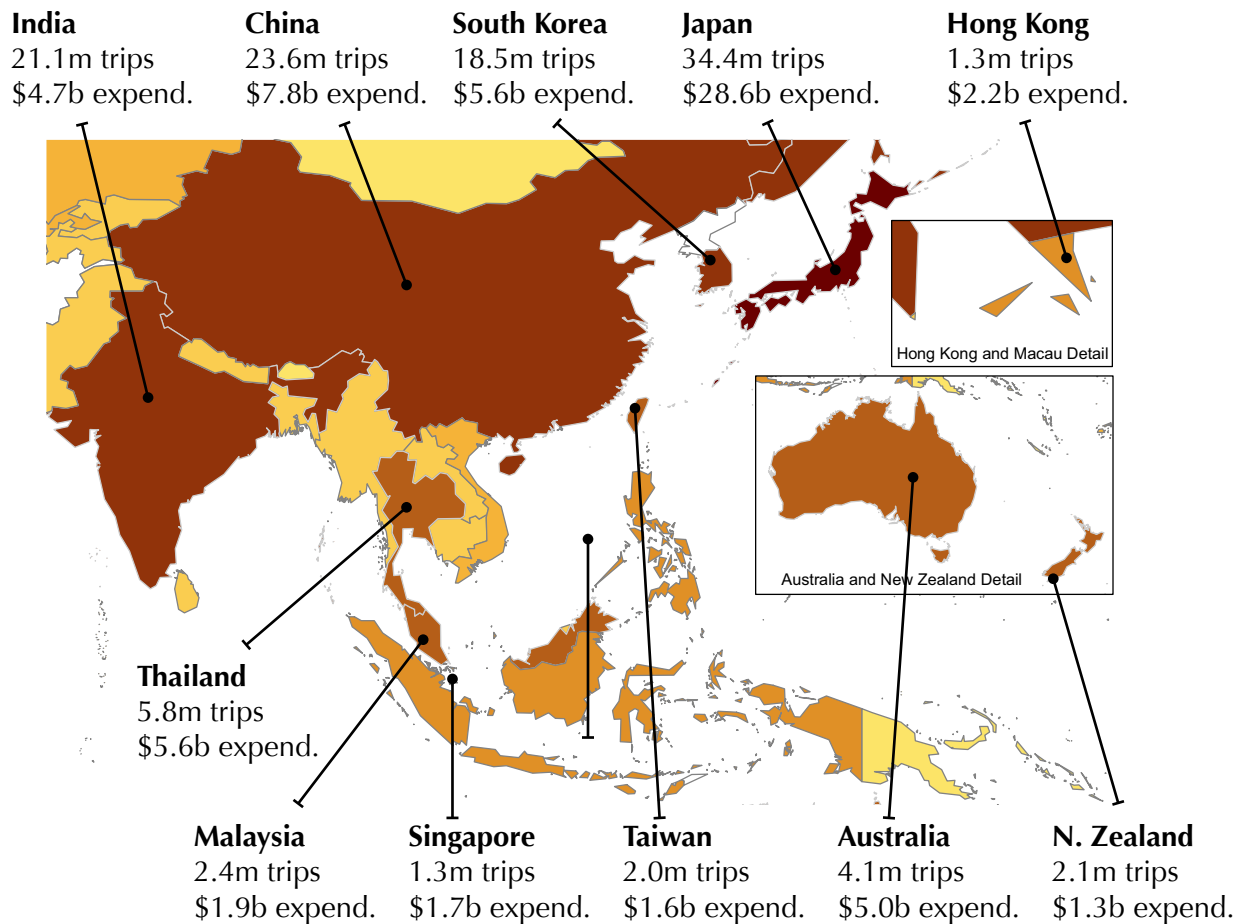
Europe: Top Wellness Tourism Countries (2012)

	Trips			Market Size	Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expenditures* (\$ millions)	Wellness Tourism Direct Employment (jobs)	Wellness Tourism Economic Impact (\$ millions)
Germany	49,254.9	5,623.4	43,631.4	\$42,198.8	559,038	\$117,107.1
France	27,255.7	6,900.3	20,355.5	\$24,079.5	287,172	\$61,249.7
Austria	11,289.1	5,675.0	5,614.1	\$14,033.7	160,503	\$38,802.4
United Kingdom	17,837.5	3,633.6	14,203.9	\$12,260.1	208,674	\$35,375.8
Italy	8,081.0	1,566.3	6,514.7	\$11,697.1	156,966	\$29,545.5
Switzerland	10,151.6	5,101.8	5,049.7	\$11,389.2	113,577	\$39,779.4
Spain	9,954.3	2,602.7	7,351.6	\$7,605.4	92,804	\$21,327.1
Russia	9,989.9	1,304.0	8,686.0	\$3,807.1	132,978	\$15,800.7
Portugal	3,441.8	1,419.7	2,022.1	\$3,419.7	92,462	\$9,626.8
Greece	4,471.6	1,835.1	2,636.5	\$3,307.3	71,148	\$8,363.2
Turkey	6,655.5	2,065.7	4,589.8	\$3,239.6	51,985	\$8,745.4
Denmark	5,814.6	1,153.0	4,661.6	\$3,123.8	38,344	\$10,528.3
Sweden	2,621.4	214.5	2,406.9	\$2,535.9	32,712	\$10,187.6
Norway	2,299.4	338.0	1,961.4	\$2,223.9	17,350	\$5,000.5
Finland	3,823.4	334.7	3,488.7	\$2,090.2	21,427	\$6,220.6
Poland	5,187.9	982.8	4,205.0	\$2,050.4	65,743	\$5,251.2
Ireland	2,946.8	1,179.1	1,767.7	\$1,557.8	14,323	\$6,588.4
Netherlands	1,530.3	272.7	1,257.5	\$1,479.2	46,438	\$4,157.6
Hungary	4,478.4	992.9	3,485.5	\$1,103.0	46,669	\$2,848.6
Czech Republic	3,883.2	909.1	2,974.2	\$1,059.9	48,421	\$3,160.6
Croatia	1,034.6	767.2	267.3	\$707.2	16,654	\$1,655.3
Belgium	610.6	260.5	350.1	\$699.8	7,025	\$1,749.2
Ukraine	4,862.9	484.8	4,378.1	\$479.2	51,759	\$1,765.7
Iceland	276.9	163.6	113.3	\$469.5	5,608	\$1,634.7

* Receipts/Expenditures figures include both international/inbound and domestic wellness tourism spending.
All figures include both primary purpose and secondary purpose wellness tourism.
Estimates by SRI International.

Asia-Pacific

Asia-Pacific Wellness Tourism Market Size & Impact (2012)



Arrivals/Trips: 120.0 million

Receipts/Expenditures: \$69.4 billion

Projected 5-year annual expenditures growth: 13.4%

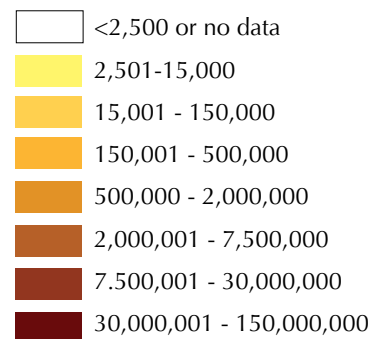
Direct jobs: 5.6 million

Total economic impact: \$213.8 billion

- Asia-Pacific is the third largest region for wellness tourism after Europe and North America.
- Key inbound source markets: intra-Asia travel, as well as Europe and Gulf countries.
- Domestic tourism accounts for about 86% of wellness tourism trips, but only 58% of wellness tourism expenditures.

Legend

Wellness Tourism Arrivals/Trips
(Inbound/International + Domestic)



Asia-Pacific: Wellness Tourism Market Trends

- Asian countries have a wealth of wellness traditions and knowledge that date back thousands of years (yoga, Thai massage, etc.). Some of those wellness practices (such as Ayurveda and Traditional Chinese Medicine) incorporate preventive, curative, and therapeutic aspects that lie in the cross-over area between the wellness and medical domains. However, in many countries these services are still predominantly provided in a traditional way to the local market and have not been modernized and packaged to attract international customers.
- International wellness tourists to Asia mostly originate from Europe and Australia, and to a lesser extent, North America. Asia offers a wide selection of high-end, branded destination spas; standard/Western-style spas and fitness facilities at most hotels/resorts; as well as smaller/local services and destinations that receive more adventurous and intrepid tourists (e.g., local massage establishments, bath houses, hot springs, yoga/spiritual retreat centers, etc.). Around the world, there is growing interest in Asia's historic, cultural, and spiritual wellness practices (witness the rapid rise of yoga, tai chi, and similar activities worldwide). Businesses able to package and deliver locally-rooted services in an authentic yet modern way, at a variety of price points, can expect to see strong growth from overseas tourist markets.
- Asians who travel for wellness tend to be segregated into two groups: 1) wealthy travelers familiar with and interested in the latest and most modern Western-style spa and wellness treatments; and 2) persons who travel domestically for traditional, less expensive, locally-focused services and destinations (e.g., hot springs resorts in China and Taiwan; bath houses in Korea and Japan). As traditional Asian practices are repackaged, modernized, and grow in popularity among international tourists, demand can also be expected to grow rapidly among intra-Asia and domestic Asian tourists.
- China represents a huge wellness tourism opportunity due to its sheer size – outbound tourism trips are forecasted by Euromonitor to grow from the current 49 million at a 14.5% annual growth rate over the next five years, while domestic tourism trips numbered 2.5 billion in 2012 (with a forecasted 10.1% annual growth rate). While Chinese are making more international trips, many are still traveling in groups and are likely to engage in wellness-related activities only when included in their itinerary (e.g., getting a Thai massage in Thailand as part of a tour). However, high-income Chinese are quick on the uptake of new trends and increasingly wellness-minded, thus we see considerable potential in marketing wellness offerings to them, particularly when a brand or Western client base has already been established. Inbound wellness tourism to China also

carries considerable potential – tapping into the country’s cultural traditions and natural resources (TCM, hot springs, etc.) – if these are packaged with modern hospitality and tourism facilities and service standards.

- A number of governments and tourism ministries in Asia have begun aggressively promoting medical tourism over the last decade (e.g., Thailand, Singapore, Malaysia,

Philippines). In contrast, there has been much less activity in promoting wellness tourism, and often the promotional language is casually mixing these two distinct segments. India has been an exception in this regard, in its promotion of a broader, more holistic concept of wellness as tied to location traditions and offerings.

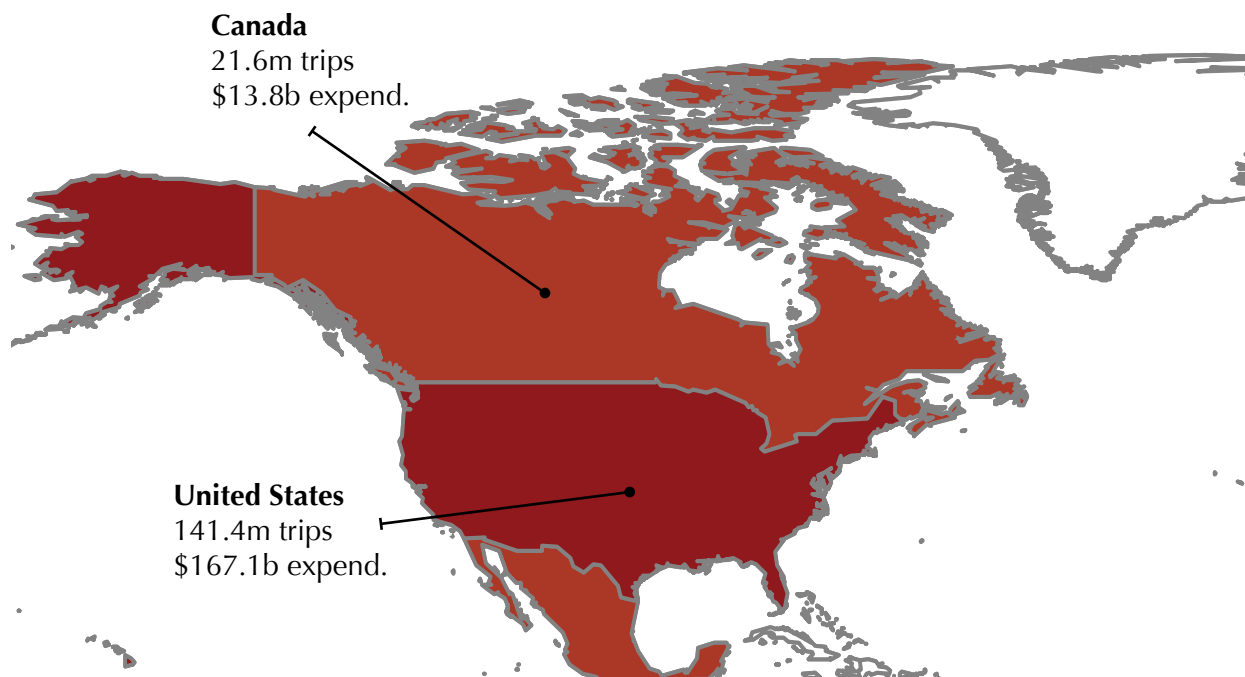
Asia-Pacific: Top Wellness Tourism Countries (2012)

	Trips			Market Size	Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expenditures* (\$ millions)	Wellness Tourism Direct Employment (jobs)	Wellness Tourism Economic Impact (\$ millions)
Japan	34,414.8	1,171.1	33,243.7	\$28,565.7	313,583	\$89,444.1
China	23,581.0	2,064.4	21,516.6	\$7,783.9	822,322	\$27,337.0
South Korea	18,543.4	1,578.4	16,965.0	\$5,630.1	147,011	\$15,903.7
Thailand	5,804.5	3,090.8	2,713.7	\$5,553.9	422,741	\$12,759.7
Australia	4,143.2	452.9	3,690.3	\$4,989.1	65,790	\$20,583.5
India	21,061.7	1,029.4	20,032.3	\$4,651.6	3,245,415	\$15,472.1
Hong Kong	1,328.0	1,327.6	0.4	\$2,155.4	31,659	\$4,960.2
Malaysia	2,381.7	1,069.1	1,312.6	\$1,876.4	71,982	\$4,204.9
Singapore	1,257.5	1,255.0	2.5	\$1,722.5	17,141	\$3,719.9
Taiwan	2,035.1	406.6	1,628.5	\$1,565.0	42,459	\$4,169.0
New Zealand	2,060.8	208.3	1,852.5	\$1,311.9	30,940	\$5,800.1
Indonesia	829.4	629.0	200.5	\$992.0	111,009	\$2,969.8
Philippines	539.8	375.4	164.4	\$478.7	71,414	\$1,645.1
Macau	134.7	134.7	0.0	\$420.0	3,856	\$836.0
Maldives	381.0	375.9	5.1	\$372.1	21,032	\$808.2
Fiji	303.0	302.6	0.4	\$351.8	27,217	\$964.7
Vietnam	471.1	188.4	282.6	\$200.8	59,014	\$418.1

* Receipts/Expenditures figures include both international/inbound and domestic wellness tourism spending. All figures include both primary purpose and secondary purpose wellness tourism. Estimates by SRI International.

North America

North America Wellness Tourism Market Size & Impact (2012)



Arrivals/Trips: 163.0 million

Receipts/Expenditures: \$181.0 billion

Projected 5-year annual expenditures growth: 8.0%

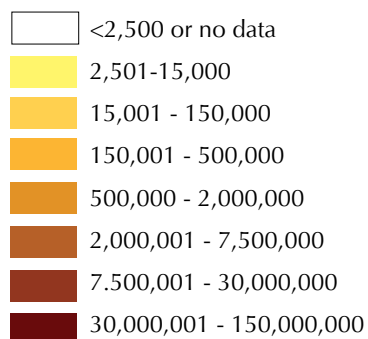
Direct jobs: 2.3 million

Total economic impact: \$571.5 billion

- North America ranks first in wellness tourism expenditures.
- North America ranks second (after Europe) for the number of wellness tourism trips.
- Domestic tourism account for the majority (94%) of wellness tourism trips in North America.
- Key inbound source markets: Europeans and high-income Asian countries.

Legend

Wellness Tourism Arrivals/Trips
(Inbound/International + Domestic)



North America: Wellness Tourism Market Trends

- The modern concepts of for-profit spa and wellness originated in the United States, and the spa market is mature and well-understood in the North American market. North American consumers have a good understanding of the importance of a healthy lifestyle – exercising at a gym, eating well, going to spa for a relaxing massage, etc. However, the United States and Canada also rank among the most unhealthy countries in the world on measures such as obesity rates. While they understand the idea of wellness, most North American consumers have not yet integrated wellness practices into their lifestyles.
- Due to geographic size and diversity, Americans and Canadians are far more likely to travel domestically for wellness than to travel abroad. In the United States, only a small portion of the population travels overseas at all (only 36% of Americans even had a passport in 2012, and 54% of the 58.7 million outbound trips made by Americans in 2011 were to Mexico or Canada).²⁷
- Americans and Canadians have far fewer vacation days as compared to other countries around the world. Therefore, the most accessible and attractive wellness tourism options for most North American travelers are domestic short-haul trips, weekend trips, and “city breaks” (e.g., spa weekends, weekend yoga retreats, etc.).²⁸ Weeklong trips to destination spas and long-haul overseas trips purely for wellness are largely limited to a small, predominantly wealthy segment of travelers.
- North American consumers are increasingly conscious about wellness and a healthy lifestyle. Many are expecting to continue their healthy eating, exercising, sleeping, pampering, and relaxing while they are on vacation or business travel. Spas and gyms have already become standardized and expected offerings at four- and five-star hotels, and hospitality brands that are catering to this growing segment may find an increased range of wellness offerings to be an important differentiator (for example, giving rise to the development of the “healthy hotel” concept).
- In the United States, future growth in demand for wellness services – and travel for wellness – may be impacted by healthcare legislation and the extent to which insurers will pay for preventive and wellness-related services. There are instances, for example, where primary care doctors “prescribe” fresh fruits and vegetables as part of the treatment plan for obese patients, with the cost of such

²⁷ See: travel.state.gov/passport/ppi/stats/stats_890.html and tinet.ita.doc.gov/outreachpages/download_data_table/2011_US_Travel_Abroad.pdf.

²⁸ Americans and Canadians rank at the bottom of all countries in terms of their number of annual vacation days. See, for example: www.cepr.net/index.php/publications/reports/no-vacation-nation-2013 and www.expedia.com/p/info-other/vacation_deprivation.htm.

prescriptions being supported by some public health programs. The Affordable Care Act, which goes into effect in 2014, requires U.S. insurers to cover (at no cost) a

long list of preventive services; however, the impact of this change in terms of Americans pursuing wellness and preventive practices (and traveling for such purposes) remains to be seen.

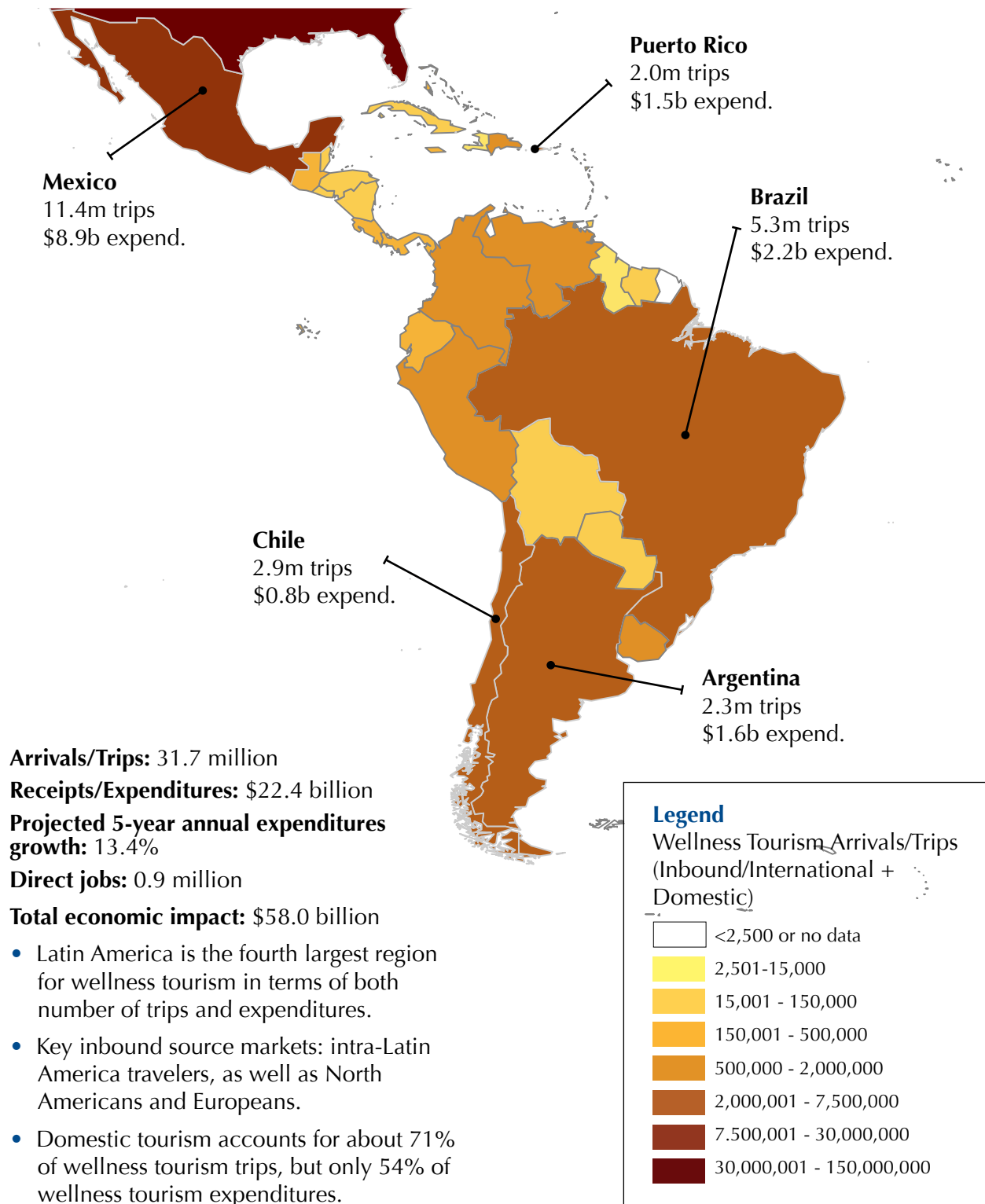
North America: Top Wellness Tourism Countries (2012)

	Trips			Market Size	Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expenditures* (\$ millions)	Wellness Tourism Direct Employment (jobs)	Wellness Tourism Economic Impact (\$ millions)
United States	141,368.4	7,103.2	134,265.2	\$167,139.9	2,122,651	\$513,761.3
Canada	21,599.8	2,560.9	19,038.9	\$13,841.5	224,174	\$57,730.3

* Receipts/Expenditures figures include both international/inbound and domestic wellness tourism spending.
All figures include both primary purpose and secondary purpose wellness tourism.
Estimates by SRI International.

Latin America

Latin America Wellness Tourism Market Size & Impact (2012)



Latin America: Wellness Tourism Market Trends

- Among Latin American consumers, the concept of wellness still tends to be associated with beauty, pampering, and luxury. While there is a growing consciousness of wellness as being related to healthy eating, exercise, and quality of life, especially among urban dwellers, the mindset of pursuing more holistic wellness practices for health promotion and prevention is not widespread.
- In South America, wellness tourism is still in its infancy and is not yet seen as a high-growth opportunity. The spa industry is young and small but growing rapidly. There is already a booming market for cosmetic surgery (in countries such as Brazil, Colombia, Venezuela, Argentina²⁹) with world-class providers serving both a local and international market, and these activities are possible jumping-off points for development of other wellness, elective, and preventive treatments and services. Traditional aesthetic clinics in Brazil, Argentina, and other countries are starting to add massage and spa-like services, and these also represent a growing crossover market between beauty, fitness, medical, and spa (although these tend to serve more of a local clientele rather than tourists).
- In the Caribbean, wellness tourism is dominated by relaxation and recreation (e.g., hotel and resort spas with the standard menu of services; sun, sand, and

sea activities), serving mainstream tourists mainly from the United States and Canada. While the Caribbean Spa & Wellness Association is seeking to brand the region as the “world’s largest spa and wellness centre,” the wellness offerings are centered around typical Western spa services.

- In some Central and South American countries (Costa Rica, Belize, Ecuador, Peru, Brazil’s Amazon region), the rapidly growing ecotourism market is bringing some growth opportunities in wellness and eco/adventure crossover tourism (e.g., eco-spas, adventure spas, jungle spas, etc.).
- The entire region boasts extensive and varied natural resources that support eco, adventure, and outdoor tourism, and these could be tapped and packaged to extend to wellness tourism. The Andes – stretching from Panama and Colombia to the southern tip of Chile and Argentina – boasts thousands of hot/thermal springs, a number of which have been developed into resort and bathing facilities, currently serving a predominantly local and regional market.³⁰ In addition, the jungle and Amazon regions offer huge potential for developing local, natural products and services, while the

Brazil ranked 2nd globally for the number of aesthetic/cosmetic procedures in 2011, while Colombia, Venezuela, and Argentina ranked among the top 25 nations. See: www.isaps.org/files/html-contents/Downloads/ISAPS%20Results%20-%20Procedures%20in%202011.pdf.

For example, a new business association in Chile is seeking to boost hot springs tourists by 12%, to 1 million visitors in 2015. Hot springs visitors in Chile are 9% European, 3% from the United States, 5% from other South American countries, and the remainder from Chile. See: en.mercopress.com/2010/11/15/chile-targets-a-million-visitors-to-thermal-hot-springs-by-2015.

Caribbean region has assets for developing thalasso treatments.

- Throughout South America and the Caribbean are strong indigenous herbal, traditional medicine, and healing traditions. These tend to be localized, primitive, and un-researched – they have not yet

developed into defined systems of therapy (in the way that TCM, Thai massage, or other traditions have developed in Asia), and have yet to be linked to spa or tourism offerings in any meaningful way.

Latin America: Top Wellness Tourism Countries (2012)

	Trips			Market Size	Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expenditures* (\$ millions)	Wellness Tourism Direct Employment (jobs)	Wellness Tourism Economic Impact (\$ millions)
Mexico	11,387.8	4,615.6	6,772.2	\$8,893.7	416,462	\$19,235.1
Brazil	5,282.5	86.3	5,196.2	\$2,210.0	84,747	\$5,906.6
Argentina	2,282.7	173.5	2,109.2	\$1,588.1	58,176	\$4,493.0
Puerto Rico	2,004.8	206.1	**1,798.7	\$1,482.1	12,185	\$4,147.4
Dominican Republic	876.4	867.1	9.2	\$1,165.3	73,854	\$3,745.6
Chile	2,891.3	210.8	2,680.4	\$848.8	24,089	\$2,392.2
Bahamas	255.2	252.6	2.6	\$624.6	18,821	\$1,375.3
Jamaica	404.9	400.7	4.2	\$602.0	42,852	\$1,971.0
Peru	771.3	125.0	646.3	\$511.6	22,866	\$1,349.9
Venezuela	1,273.5	20.4	1,253.1	\$410.5	11,309	\$1,134.1
Colombia	668.7	50.4	618.3	\$400.5	28,238	\$1,271.9
Uruguay	1,073.5	165.4	908.1	\$309.0	9,592	\$898.3
Netherlands Antilles	144.6	143.2	1.5	\$260.3	3,014	\$785.3
Costa Rica	162.9	155.8	7.1	\$256.8	10,917	\$655.3
Aruba	102.9	101.9	1.0	\$225.8	4,860	\$713.8
Barbados	85.6	84.7	0.9	\$220.4	6,058	\$731.8

* Receipts/Expenditures figures include both international/inbound and domestic wellness tourism spending.

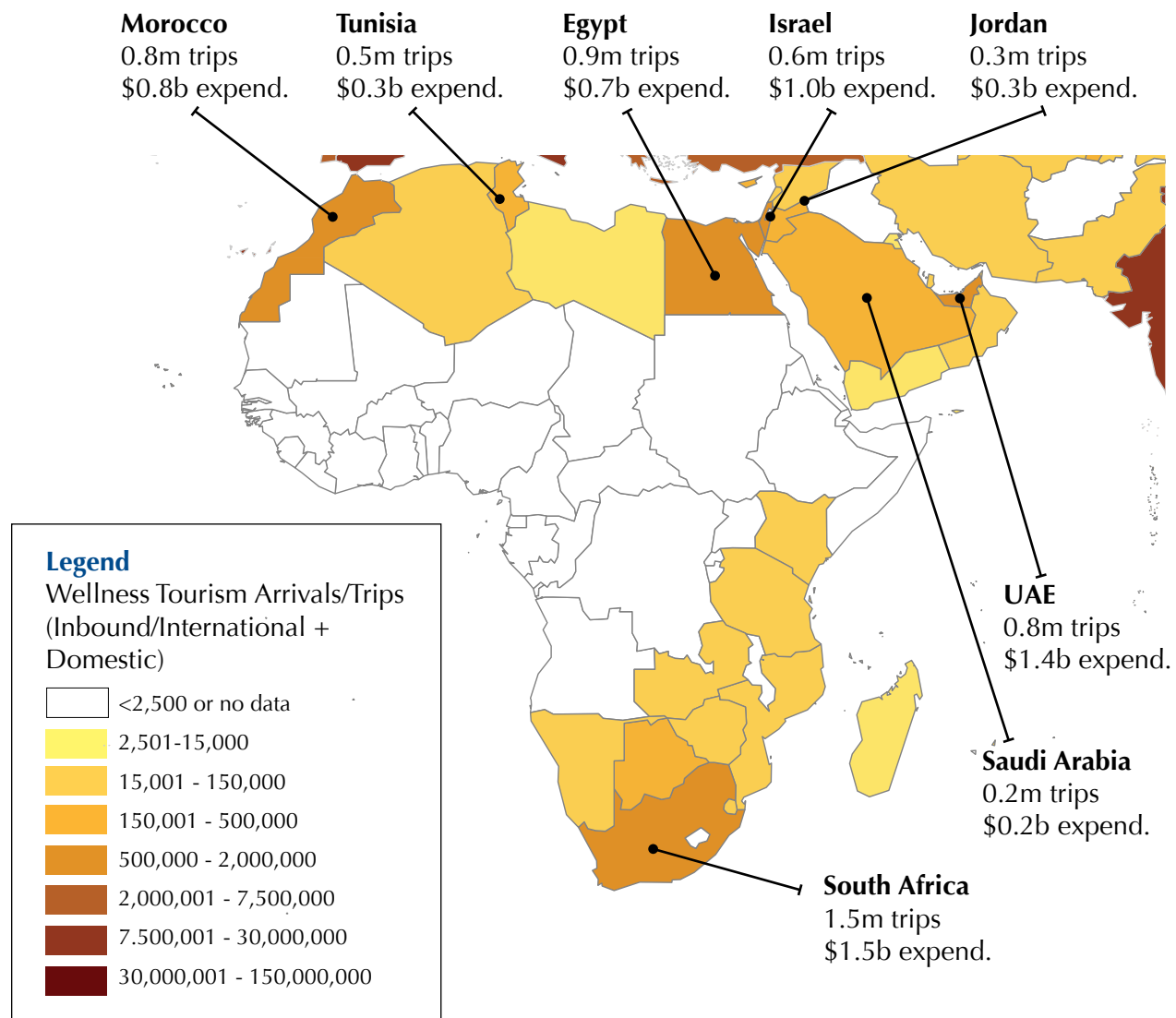
** Includes visitors from the United States.

All figures include both primary purpose and secondary purpose wellness tourism.

Estimates by SRI International.

Middle East And Africa

Middle East And Africa Wellness Tourism Market Size & Impact (2012)



Arrivals/Trips: 4.8 million (Middle East) / 2.2 million (Africa)

Receipts/Expenditures: \$5.3 bil (Middle East) / \$2.0 bil (Africa)

Projected 5-year annual expenditures growth: 16.2% (ME) / 12.6% (Afr.)

Direct jobs: 0.2 million (Middle East) / 0.1 million (Africa)

Total economic impact: \$13.4 bil (Middle East) / \$6.0 bil (Africa)

- Middle East and Africa are the smallest regions for wellness tourism in terms of both number of trips and expenditures.
- Key inbound source markets: Europeans and wealthy/developed Asian countries, as well as intra-region travelers.
- Wellness tourism is dominated by international tourists, who, account for 63% of wellness tourism trips and 75% of wellness tourism expenditures in Middle East, and 60% of trips and 94% of expenditures in Africa.

Middle East And Africa: Wellness Tourism Market Trends

- In the Middle East, the concept of wellness tends to be linked with luxury, pampering, and beauty. Consumers mostly associate wellness with pampering and relaxation at a spa, rather than as a more holistic concept of improving health and quality of life through nutrition, fitness, mental balance, etc. Demand for healthy lifestyle services and activities (nutrition, yoga, Pilates, etc.) and alternative services and treatments (e.g., ozone treatments) is starting to grow in the region but is still nascent.
- The Middle East has a long tradition of bathing associated with the hammams/Turkish baths. Some of these historic facilities are now being modernized into spa-like destinations that serve tourist markets, and hammam bathing traditions are also being integrated into spa services in the region. The region also has a strong cultural tradition of hospitality that is an asset for tourism and especially for building wellness tourism.
- The Middle East region – in particular the GCC countries – have been experiencing massive infrastructure investment and construction of tourism facilities and amenities. Construction is primarily driven by higher-end hotels and real estate developments focused on luxury. Extensive spa and fitness facilities are now standard and expected components in these developments, but very few are being developed with a broader wellness concept

in mind. Key inbound tourist markets targeted by these developments include Europeans (especially Russians), wealthy Asians, and Americans, as well as intra-GCC region tourists.

- Due to the limited facilities and high cost of healthcare, the Middle East (especially GCC countries) is a huge source of outbound medical and medical/wellness crossover tourism to Europe, North America, and Asia. Governments in the Gulf region have recently started to focus on medical tourism development and are investing in infrastructure and hospitality services/packages to promote the sector (e.g., Dubai Healthcare City).³¹ These developments are largely intended to capitalize on the demand for healthcare within their own countries and the region. Government-level efforts toward promoting wellness tourism have not yet arisen. However, unhealthy lifestyles and chronic diseases that accompany rapidly rising income are beginning to capture the attention of policymakers and the popular press in the Gulf region. As a result, the concept of wellness and wellness tourism will likely gain momentum in the coming decade.
- In most of Africa, both wellness and spa are still new and developing concepts. Wellness tourism is concentrated in a few regions and

³¹ For example, in 2012 the Crown Prince of Dubai announced a concerted strategy to position Dubai as a regional hub for medical tourism, through a partnership of the Dubai Health Authority and Dubai Department of Tourism & Commerce Marketing, with significant investments in hospitals, health centers, and hotels. See: www.eturbonews.com/35026/dubai-aims-become-top-destination-health-tourism-middle-east-and www.imtj.com/news/?entryid82=421412.

is dominated by international tourists. In Northern Africa, countries such as Tunisia and Morocco have a well-developed resort spa sector primarily serving leisure vacationers from Europe. In Sub-Saharan Africa, wellness tourism tends to be linked with safari and adventure tourism. Luxury game reserves and safari camps in countries such as South Africa, Botswana, and Kenya typically offer wellness and spa facilities and services that incorporate natural and cultural African elements. A few island destinations in Africa (Seychelles, Mauritius) offer luxury resort and destination spas serving a wealthy international clientele. South Africa is the only part of Africa that has appreciable domestic wellness tourism, with an overall more developed spa market and wellness destinations such as spa resorts, hot springs,

health farms, and wellness centers that attract both domestic and international visitors.

- Both wellness tourism and tourism in general are expected to grow rapidly in Africa as the region develops – attracting international attention as the next frontier for tourism – and also as intra-African tourism increases. New spas, hotels, and resorts are opening in African countries that have until recently not been on the map for the wellness tourism/spa/hospitality sector (e.g., in Eastern African countries such as Ghana, Gambia, Senegal). Governments in countries throughout the continent are starting to prioritize development of the spa and tourism industries, with an accompanying increase in promotion of spa and wellness tourism.

Middle East And Africa: Top Wellness Tourism Countries (2012)

	Trips			Market Size	Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expenditures* (\$ millions)	Wellness Tourism Direct Employment (jobs)	Wellness Tourism Economic Impact (\$ millions)
South Africa	1,489.7	665.9	823.8	\$1,487.3	75,671	\$4,601.2
UAE	779.4	603.6	175.8	\$1,410.4	9,133	\$3,042.7
Israel	630.8	262.1	368.7	\$973.2	14,387	\$3,241.0
Morocco	837.9	464.2	373.7	\$824.0	80,247	\$1,775.4
Egypt	939.8	593.4	346.4	\$702.1	56,555	\$1,544.9
Jordan	339.3	271.9	67.4	\$327.6	15,809	\$1,218.4
Tunisia	481.9	354.5	127.4	\$252.1	16,872	\$526.3
Saudi Arabia	221.2	48.0	173.2	\$175.4	2,598	\$420.9
Oman	78.1	52.3	25.7	\$152.0	2,407	\$347.6
Seychelles	62.2	58.5	3.6	\$146.5	6,637	\$374.9
Lebanon	41.7	33.3	8.3	\$132.6	3,869	\$358.5
Bahrain	180.0	180.0	0.0	\$125.4	2,813	\$315.0

* Receipts/Expenditures figures include both international/inbound and domestic wellness tourism spending.
All figures include both primary purpose and secondary purpose wellness tourism.
Estimates by SRI International.

V. Key Messages About Wellness Tourism

1. Wellness tourism is riding a wave of demographic and lifestyle trends that is putting proactive health, mindfulness, and prevention at the center of consumer decision-making.

Wellness tourism is about much more than where people visit and what they do – it is an extension of the values and lifestyle of the traveler. Globally, consumer values and lifestyles are increasingly incorporating elements of health, prevention, self-actualization, experience, and mindfulness. This expanding consumer group, broadly labeled as LOHAS (“Lifestyles of Health and Sustainability”), is concerned with the environment, sustainability, social responsibility, health, and well-being. They also tend to be educated early adopters and are multi-dimensional in the values and beliefs that drive their decision-making.³²

Over the past two decades, LOHAS consumers have become a key driver of trends including

healthy, organic, and local foods; exercise, yoga, and meditation; from solar panels and recycling; to niche tourism movements such as ecotourism and sustainable tourism.³³

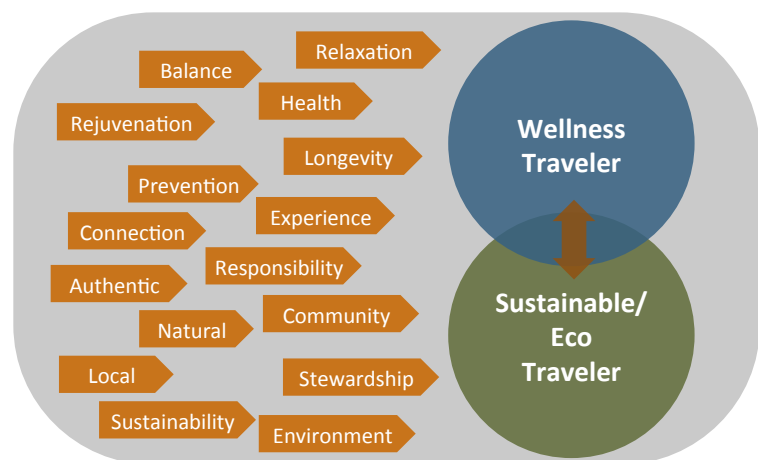
The wellness industry is positioned to ride this wave, which is further propelled by the broad recognition of the growing “unwellness” of the planet’s inhabitants and the unsustainable medical model of focusing on “sickcare.”

It is important to note that the wellness tourism market is not limited to people traveling to destination spas, wellness centers, and yoga retreats (i.e., primary wellness trips). People concerned about their health and well-being will increasingly incorporate their priorities into any kind of leisure or business trip (i.e., secondary wellness trips). This bodes well for the continued growth of wellness tourism in the coming decade.

³² See www.lohas.com/research-resources for additional information and research about the LOHAS market.

³³ See Appendix C for definitions of ecotourism and sustainable tourism.

Wellness tourism reflects the convergence of new values that consumers bring to their travel decisions.



2. Wellness tourism and medical tourism occupy distinct yet complementary spaces, meeting consumer needs along the vast health continuum.

Over the past two decades, medical tourism has experienced tremendous growth, as increasing numbers of patients travel to other countries to seek better access to healthcare, higher quality care, and more affordable treatments. As the medical community expands its service paradigm to emphasize prevention and self-responsibility, terms such as “medical wellness” begin to enter the general lexicon. However, inconsistent use of terminologies by media, industry, and governments, as well as vague labels such as “health tourism,” have led to confusion among consumers and other stakeholders that medical tourism and wellness tourism are the same thing – to the detriment of both sectors.

Medical tourism and wellness tourism are fundamentally different activities that meet different tourist or patient needs (see box on the following page). While there are clearly some areas of overlap, over-emphasizing their convergence risks confusing potential customers and diluting the appeal and impact of both segments. Successful medical tourism depends upon the status of a country’s broader medical sector, along with appropriate government regulations, patient safeguards, training standards, insurance frameworks, travel and visa restrictions, and other issues that drive the quality and success of this sector. While wellness

tourism shares a dependence on a region’s basic tourism and hospitality infrastructure and amenities, its appeal and success depend entirely on a different set of factors, business models, customer mindsets, and industry culture. It is much more aligned with the culture of leisure, recreation, and hospitality; its services are more customer-driven; and it caters to more proactive and holistic customer needs and motivations.

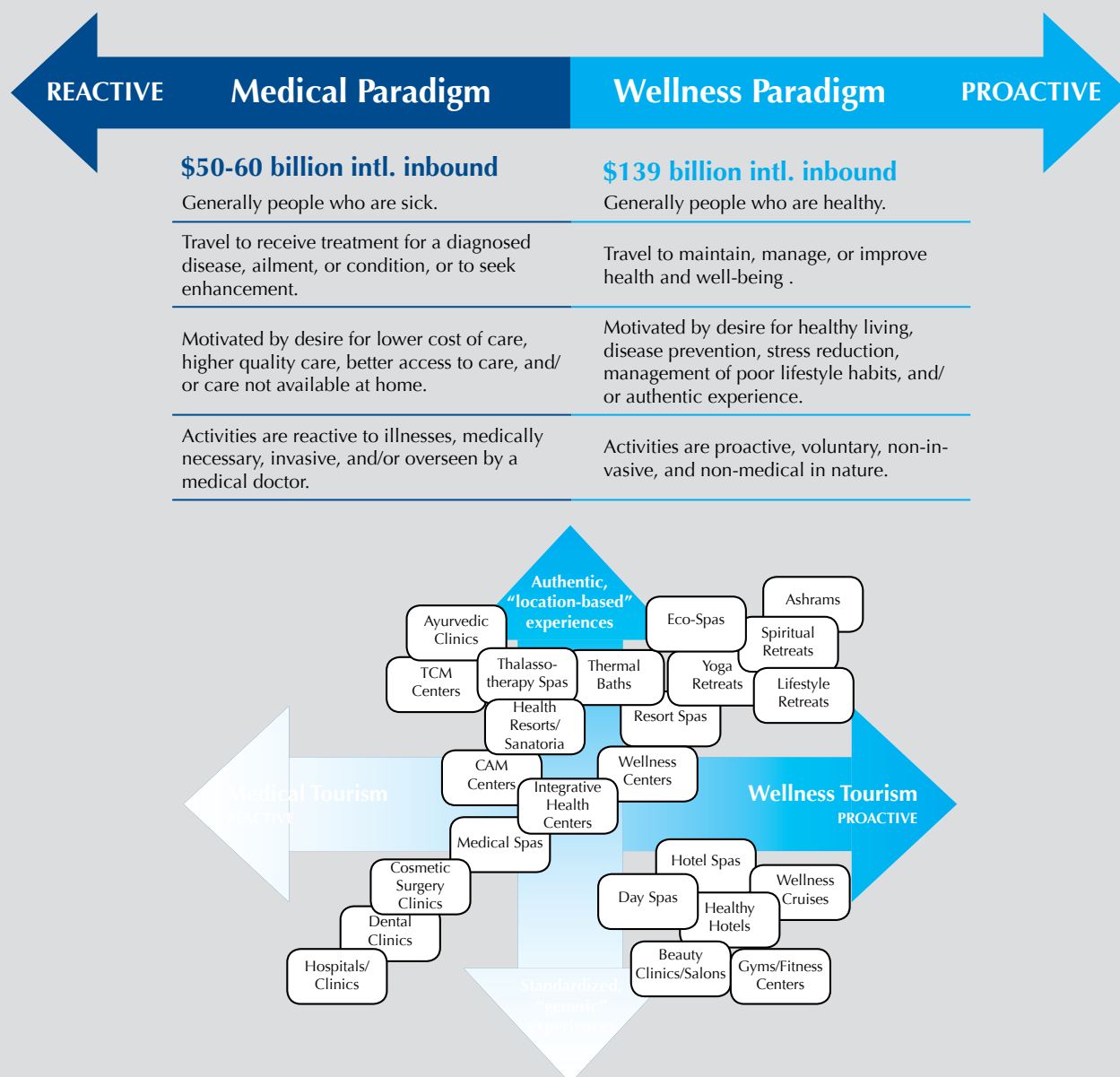
According to industry stakeholders, attempts by destinations and businesses to market the two together have often failed. Medical tourism decisions are fundamentally driven by the desire to obtain the highest quality of care at the best price, and not by whether a beach or five star resort is available nearby – the cliché of “sun, sand, and scalpel” tourism is in most cases a misnomer. The nature of many of the top medical tourism procedures (e.g., cosmetic surgery, orthopedic surgery, cardiac surgery) renders participation in relaxation and leisure activities impractical or impossible. Provision of some medical/wellness crossover services – such as preventive care, chronic disease management, life coaching, and so on – may be impractical from a tourism standpoint because these require regular contact and follow-up with the provider and are better targeted at a local customer base. From a tourism marketing perspective, combining spa, wellness, and leisure offerings with medical tourism offerings can “soften” a potential medical tourist’s perception of the rigor and quality of a destination’s medical care. Conversely, this approach can also limit the scope and appeal of a destination’s wellness tourism offerings to a

Understanding The Difference Between Wellness Tourism And Medical Tourism

Medical tourism and wellness tourism are fundamentally different activities that meet different traveler or patient needs. The conditions and factors that make a destination successful in either type of tourism are also very different. The distinction between medical tourism and wellness tourism is best understood by applying the concept of the “continuum of health” (see Section II and below).³⁴

The overlap between wellness tourism and medical tourism occurs around activities toward the middle of the health continuum, such as thalassotherapy, thermal baths, health resorts, sanatoria, medical spas, DNA testing, and executive checkups – activities that can be both preventive and curative.

As the conventional medical industry increasingly turns toward preventive, alternative, and traditional approaches in order to deliver more effective care and improve costs – and as the scientific evidence base for alternative and wellness-oriented therapies grows – the lines between medical tourism and wellness tourism will in some instances blur.



³⁴ For a more detailed discussion of the differences between medical tourism and wellness tourism, see: Johnston, Puczkó, Smith, and Ellis, Wellness Tourism and Medical Tourism: Where Do Spas Fit?, May 2011, www.globalspaandwellnesssummit.org/images/stories/pdf/spas_wellness_medical_tourism_report_final.pdf.

narrower group of consumers.

There is some overlap between medical tourism and wellness tourism, but these areas of convergence should be pursued carefully from a tourism standpoint, with a clear understanding of the target consumer markets and how best to communicate with them. From a policy and industry perspective, the two are best developed and marketed separately. At the same time, both medical tourism and wellness tourism depend upon a strong transportation and hospitality infrastructure (e.g., flight connections, hotels) to flourish, so a general attention to the basic tourism infrastructure will clearly benefit both sectors.

3. Domestic wellness tourism represents a large opportunity that can be leveraged to attract higher-spending international tourists.

Domestic wellness tourism is a much larger market than international wellness tourism. In 2012, an estimated 86 million international wellness tourism trips were logged, versus 438 million domestic wellness tourism trips (five times the number of international trips).³⁵ Domestic travel, “city breaks,” “weekend breaks,” and short-haul trips have become more popular,³⁶ especially during a time of shrinking travel budgets in the recent global recession.

Considering the expense of traveling overseas to a destination spa, wellness retreat, or ashram, domestic travel is a more promising market in the promotion of wellness trips to the primary wellness customer. It is a relatively major and expensive proposition to take a long-

haul overseas trip that is primarily wellness-motivated.³⁷ People who want to take a primary wellness trip are much more likely to take a shorter, less expensive trip closer to home (e.g., a spa weekend or yoga retreat in a nearby city). These kinds of wellness tourists are high-yield and represent a large potential market for businesses and destinations to tap into.

Focusing on domestic tourism presents a number of opportunities for tourism, hospitality, and wellness providers and destinations:

- Domestic tourists tend to be socially diverse (in terms of income levels, ages, etc.) and therefore represent an opportunity to develop numerous offerings that appeal to a variety of price points and interests.
- Domestic tourism can also be counter-cyclical – that is, people are more likely to take a trip close to home or a “weekend break” during the off-season and shoulder season, while saving longer overseas trips for the winter holidays and summer vacations.
- Many traditional wellness providers that cater to a domestic market have not upgraded their offerings to attract the contemporary wellness tourist (e.g., traditional sanatoria and thermal baths in

³⁵ Likewise, in the overall tourism market there are many more domestic tourists than international tourists: in 2012, there were seven times more domestic tourism trips than international trips.

³⁶ Euromonitor projects that domestic tourism trips will grow by 6.5% annually from 2012-2017, while outbound international tourism trips will grow by 4.3% annually. See www2.unwto.org/sites/all/files/elements_on_domestic_tourism.pdf for an overview of domestic tourism.

³⁷ The exception to this is within Europe, where international wellness tourism to another European country is not much different than domestic wellness tourism across state lines within the United States.

Eastern Europe, traditional Thai massage venues in Thailand, or reflexology centers in China). Focusing on higher-yield domestic wellness tourists presents an opportunity to upgrade these offerings to a higher service standard, serving as a springboard for also attracting international wellness tourists that bring higher spending and longer stays.

4. Locally-rooted offerings are a key differentiator to attract travelers who seek authentic, place-based experiences.

As travelers become more sophisticated, they increasingly seek experiences that are “real,” authentic, and local. Experiences are more valuable when they are unique, and tourists are willing to pay more for something that is individualized and not replicable elsewhere.³⁸

As the wellness tourism market matures, locally-based offerings are an important way to create differentiation; in fact, these will be increasingly be expected by wellness (and other) tourists. Businesses seeking to attract wellness tourists should leverage local traditions and resources to create a differentiated experience for their visitors. This includes drawing upon historical and spiritual traditions and indigenous wellness practices, using local and natural ingredients in products, creating a built environment that reflects unique aspects of local geography and climate, and so on. This kind of locally-rooted experience is appealing to an increasing number of “niche” tourists – not just wellness tourists, but also ecotourists, cultural tourists, and others. Every country and region has its own wealth of

traditional, cultural, and naturally-based health, healing, and wellness traditions, but only a few of these have been modernized or validated for broad promotion or adoption. While practices such as Thai massage, yoga, reflexology, and tai chi have already gained widespread recognition and consumer acceptance (and arguably also support tourist interest in places like Thailand, India, and China, whether or not they are not being proactively marketed by the countries themselves for wellness tourism purposes), many traditional practices have yet to be packaged or marketed. More research and scientific evidence on the efficacy of traditional, natural, and alternative therapies will also help to make these attractive to discerning wellness consumers and will increase their value for attracting wellness tourists.

³⁸ For example, according to a 2011 report by UNEP, “There is empirical evidence that tourists seeking environmental and culturally differentiated destinations are willing to pay more for this experience. Inman et al. (2002) estimate this to be between 25 per cent and 40 per cent... One third to one half of international tourists (weighted toward the USA) surveyed in a CESD and TIES (2005) study said they were willing to pay more to companies that benefit local communities and conservation.” See: www.unep.org/resourceefficiency/Portals/24147/scp/business/tourism/greenecomony_tourism.pdf and www.rainforest-alliance.org/branding/documents/consumer_demand.pdf.

5. New and varied business models are emerging to meet the wellness needs of travelers.

As discussed earlier, the wellness tourism economy is much broader than catering to the relatively small group of primary wellness tourists whose intention for travel is staying at a destination spa, visiting an ashram, or taking a weekend yoga retreat. Secondary wellness travelers – those who partake in any wellness

activities or make spending decisions based on a wellness mindset – represent a significantly larger market within wellness tourism; in 2012, we estimate there were 6.5 times more secondary wellness trips than primary wellness trips.

Many multinational hospitality companies are already starting to cater to the wellness-minded traveler who wants to maintain a healthy and active lifestyle while traveling. Over the last 10-15 years, spas and gyms have become standardized offerings at four- and five-star hotels and resorts around the world and are increasingly offered at mid-range properties as well. Many tourists expect and seek out properties with these amenities and are willing to spend more to stay at properties that offer these options, even if they don't necessarily use them during their stay.

Moving beyond just spas and gyms, hotels and resorts are now extending their wellness offerings to differentiate themselves in the marketplace. New offerings include healthy cuisine, a healthy environment (e.g., hypoallergenic or natural products and furnishings), wellness and fitness-themed rooms, gear lending, wellness-focused packages, and even wellness-branded hotel properties and chains (see box below for examples).³⁹

Spas are also seizing opportunities to capitalize on the needs of wellness-minded travelers. For example, spas are emerging in most international airports where travelers endure long layovers. In major transit points such as Dubai, Hong Kong, and Singapore, spas have opened alongside

buffets, showers, and exercise and rest areas, often located near the first-class and business lounges, so that harried road warriors can enjoy moments of rest and relaxation. As wellness becomes increasingly important to travelers, they will expect increased accessibility to and a greater range of offerings both on the road and at their destinations in order to maintain their health and well-being during their trips.

³⁹ For additional discussion and examples of the “healthy hotels” trend, see: *SpaFinder Wellness, 2013 Trend Report: Top 10 Global Spa & Wellness Trends Forecast*, www.spafinder.com/newsletter/pt/trends2013/SFW_2013_Trend-Final.pdf.

Healthy Hotels: How Mainstream Global Hospitality Companies Are Capitalizing On Wellness Trends

- Westin Hotels has long been an industry innovator in wellness and fitness offerings and over the last two years has launched the wellness branding theme “Westin for a better you.” Designed to appeal to a broad target audience of affluent professionals (both business and leisure travelers), the offerings focus on six “pillars of well-being:” sleep well (Heavenly Bed), eat well (a superfoods menu in the restaurants), move well (gear lending program, and guest rooms equipped with workout equipment), work well (business facilities/services to help people work productively), play well (kids club and leisure-focused offerings), and feel well (Heavenly Spa, in-room spa products, smoke-free hotel). Westin has gained over two percentage points in its global market share since launching its wellness brand, although it is difficult to establish a causal relationship between the two.
- In 2014, IHG will launch its new EVEN brand, a wellness-themed hotel chain targeting 17 million health-minded travelers in the United States. The first two properties will open in New York City, with a goal of 100 new properties over the next five years. Wellness offerings focus on four areas: exercise (in-room workout amenities, group classes, best-in-class gym), eat (natural/healthy foods, free filtered water), work (easy access to wifi, social and work spaces), and rest (hypoallergenic linens, natural lighting). The brand will compete with mid-range limited service hotels such as Hyatt Place and Courtyard by Marriott.
- In 2012, Hyatt launched a global healthy and sustainable food platform called “Food. Thoughtfully Sourced. Carefully Served” (see hyattfood.com). The program includes three pillars: healthy people (natural and organic ingredients, portion control, nutrient-preserving cooking techniques), healthy planet (sustainably-sourced food, eco-friendly packaging, recycling, on-property gardens), and healthy communities (locally-sourced ingredients). Hyatt is partnering with the Partnership for Healthier America to monitor the nutritional content of its restaurant menus.
- In 2012, Hilton Hotels began testing fitness-themed guest rooms in Washington, DC and San Francisco, including a “Cardio Room” and a “Yoga Room,” both of which contain in-room workout equipment and amenities. The rooms carry a \$30 per night surcharge. It is not yet clear whether the specialty rooms will be extended beyond the trial properties.
- Capitalizing on the yoga trend, a number of hotel chains have expanded yoga-focused offerings for guests, including COMO Hotels (yoga mats and television channel in guest rooms, since 1997), Kimpton Hotels (yoga equipment and on-demand yoga videos in guest rooms, free yoga classes, since 2003), Peninsula Hotels (free daily yoga classes at some properties, since 1999).⁴⁰
- In 2009, Fairmont Hotels launched a free bike-loan program in Canada, which has subsequently been extended to over 55 properties worldwide. Other hotel chains, such as Kimpton hotels, also offer complimentary bike lending at all properties across the United States.
- A new trend is hotels offering “digital detox” packages and technology-free rooms to help guests de-stress and relax during vacation. Properties such as the Westin Dublin, Kimpton Monaco Chicago, and Renaissance Pittsburgh allow guests to surrender their electronic devices upon check-in and remove technology from the room, and in return provide special promotional rates, amenities (free books, board games, walking maps), and/or services (massages, classes).

⁴⁰ Levere, Jane, “A Moment of Zen, On The Go,” New York Times, January 14, 2013, www.nytimes.com/2013/01/15/business/some-hotel-companies-and-airports-start-to-offer-yoga.html?pagewanted=all&_r=0.

6. Governments are recognizing the wide commercial benefits of wellness tourism, as well its impact on the health of their economy and their citizens.

Wellness tourism is an opportunity to broaden a country or region's tourism offerings and tap into a large and growing market of niche tourists. For many established wellness countries, pursuing this market simply requires better marketing, branding, and packaging of tourism and wellness assets that already exist in the country.

Wellness tourism development can bring a host of benefits to a country or region, beyond mere development of the tourism industry:

- Wellness tourists are high-yield tourists (they spend more than an average tourist), bringing greater economic benefits than mass tourism, while also spurring growth of higher-skilled service jobs (as compared to typical hospitality/retail sector jobs). This study estimates that international wellness tourists spend 65% more per trip than the average international tourist, while domestic wellness tourists spend 150% more.
- Because of the growing importance of authentic local experiences to wellness tourists, wellness tourism can help preserve and protect a country's cultural and natural assets. It can also support the development of a differentiated brand image for the country or region.
- As wellness consumer and tourist values evolve and mature, concepts and awareness of wellness tend to extend to

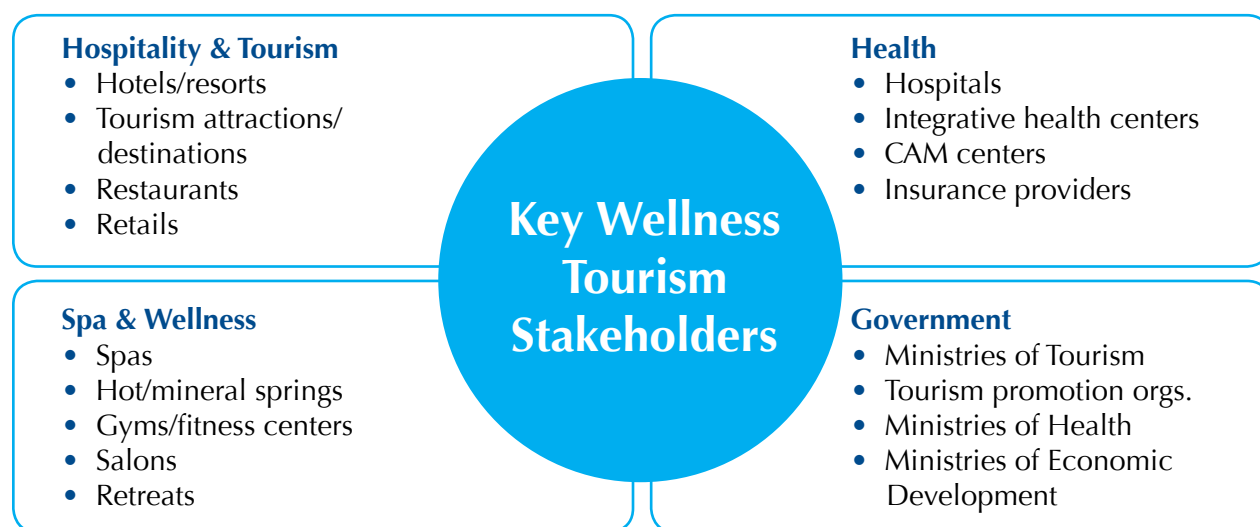
the environment and the culture of the destination they are visiting. An advanced wellness destination is one that is able to extend wellness principles beyond the door of the spa or hotel and incorporates wellness into the broader community, culture, and environment. Thus, countries and regions developing wellness tourism will need to consider building a strong wellness infrastructure throughout their region: Are the people and community "well"? Are there numerous and varied providers of wellness services? Is there an environment where wellness-oriented businesses can grow and succeed?

- Investing in wellness tourism therefore goes hand-in-hand with investing in wellness infrastructure and bringing a wellness mindset to the country's population – encouraging healthier lifestyle behaviors and a resulting reduction in healthcare spending. Government and economic development stakeholders, in partnership with the private sector, can and should pursue these important opportunities, to their vast benefit.

See Appendix A for a list of countries and regions that are currently promoting and developing wellness tourism.

Many stakeholders stand to benefit from development and expansion of wellness tourism.

There are many stakeholders who can collaborate to develop, and benefit from, wellness tourism. As illustrated in the graphic on Page 8, wellness tourism businesses include not only spas, health resorts, baths, and springs, but also many others that provide services and products catering to the multidimensional needs and interests of wellness tourists. Stakeholders also include players in the hospitality and tourism sector and the health sector, as well as the government ministries that support tourism, health, and economic and social development. Collaboration of stakeholders in all these sectors will be critical for countries and regions to develop wellness tourism successfully and to maximize the resulting economic and social impacts.



Appendix A: Examples Of Countries & Regions That Are Currently Promoting Wellness Tourism

This list is current as of October 2013, and is not exhaustive.

Europe

Andorra (visitandorra.com/en/what-to-do/relaxing-in-andorra)

Austria (www.austria.info/us/tags/spa-wellness)

City of Kitzbuhel, Austria (www.kitzbuehel.com/en/lifestyle/wellness_beauty)

City of Zell am See, Austria (www.zellamsee-kaprun.com/en/activities/spa-wellness)

Region of Bregenzerwald, Austria (www.bregenzerwald.at/s/en/well-being-spa/)

Belarus (eng.belarustourism.by/leisure/types/health/)

Bosnia & Herzegovina (www.bhtourism.ba/eng/spastourism.wbsp)

Bulgaria (bulgariatravel.org/en/tourism_types/60)

Croatia (croatia.hr/en-GB/Activities-and-attractions/Wellness)

Region of Istria, Croatia (www.istra.hr/en/attractions-and-activities/wellness)

Czech Republic (www.czechtourism.com/health-spa/)

Cyprus (www.visitcyprus.com/wps/portal/health_and_wellbeing/)

Denmark

City of Copenhagen, Denmark (www.visitcopenhagen.com/copenhagen/wellness)

Estonia (www.visitestonia.com/en/things-to-see-do/interests-lifestyle/wellness-spa)

City of Tallinn, Estonia (www.tourism.tallinn.ee/eng/fpage/goodtime/spa)

Finland (www.visitsauna.fi/en/) and (www.spa.fi/en/)

City of Helsinki, Finland (www.visithelsinki.fi/en/see-and-experience/activities-in-helsinki/wellness)

City of Posio, Finland (matkailu.posio.fi/en/Activities/Wellness-tourism)

France (us.franceguide.com/what-to-do/wellbeing/home.html?NodeID=143)

City of Lyon, France (www.en.lyon-france.com/Things-to-do/Activities-and-Relaxation/Wellness-and-Spa)

Region of Cote d'Azur, France (www.frenchriviera-tourism.com/what-to-do/well-being-and-peace-06_2493.html)

Germany (www.germany.travel/en/leisure-and-recreation/health-wellness/health-wellness.html)

City of Baden-Baden, Germany (www.baden-baden.de/en/spahealthbeauty/index.html)

City of Stuttgart, Germany (www.stuttgart-tourist.de/en/relaxing)

State of Bavaria, Germany (www.bavaria.by/spa-wellness-break-in-bavaria)

Greece (www.visitgreece.gr/en/leisure/wellness)

Hungary (gotohungary.com/en_GB/spas-of-hungary) and (visit-hungary.com/spa-wellness)

City of Budapest, Hungary (www.budapest.com/recreation_wellness.en.html?sid=)

Iceland (www.icelandofhealth.is/)

City of Reykjavik, Iceland (www.visitreykjavik.is/health-wellness)

Ireland (www.discoverireland.ie/Things-To-Do/Ideas-for-arts-culture/Spa-and-Wellness-%283%29)

City of Dublin, Ireland (www.visitdublin.com/See_and_Do/Spas)

Italy (www.italia.it/en/travel-ideas/sports-and-well-being.html)

Province of South Tyrol, Italy (www.suedtirol.info/en/Destinations--Things-To-Do/Wellness--Health.html)

Latvia (www.latvia.travel/en/spa-and-wellness)

Lithuania (www.lietuva.lt/en/tourism/why_to_visit/revitalizing_resorts)

Luxembourg (www.visitluxembourg.com/en/what-to-do/sport-leisure/swimming-wellness)

Malta (www.visitmalta.com/en/health-and-wellness)

Monaco (www.visitmonaco.com/en/Plan-your-stay/Relaxation,-Sport-Health)

Netherlands (www.holland.com/global/tourism/interests/wellness-in-holland.htm)

City of Amsterdam (www.iamsterdam.com/en-GB/experience/what-to-do/activities-and-excursions/beauty-and-wellness)

Norway (www.visitnorway.com/en/What-to-do/Recreation--sports-/Spa-in-Norway/)

Poland (www.poland.travel/en-us/health/)

Portugal (www.visitportugal.com/en/experiencias/saude-e-bem-estar)

Romania (www.romaniatourism.com/spas.html)

Russia (www.russiatourism.ru/en/rubriki/-1124140538/)

Serbia (www.serbia.travel/destinations/spas-and-health-resorts/)

Slovakia (www.slovakia.travel/portal.aspx?l=2&smi=108099&ami=108099)

City of Bratislava, Slovakia (visit.bratislava.sk/en/vismo/zobraz_dok.asp?id_org=700014&id_ktg=1040&p1=6455)

Slovenia (www.slovenia.info/en/Health-resorts-wellness.htm?zdraviliscaSLO=0&lng=2)

Spain (www.spain.info/en/que-quieres/salud-belleza/)

Region of Basque, Spain (www.basquecountry-tourism.com/leisure-relaxation.php)

Sweden (www.visitsweden.com/sweden-us/Things-to-do/Swedish-Lifestyle/Spa/)

Switzerland (www.myswitzerland.com/en-us/wellness.html)

City of Baden, Switzerland (www.baden.ch/xml_1/internet/en/application/d1281/d2305/f2306.cfm)

City of Davos, Switzerland (www.davos.ch/en/stay/health-spa-town.html) and (www.davos.ch/)

[en/stay/wellness-swimming/eau-la-la.html](#))

City of Interlaken, Switzerland ([www.interlaken.ch/en/activities-excursions-adventure-festivals/wellness-fitness-selfness-relax-spa.html](#))

City of Lausanne, Switzerland ([www.lausanne-tourisme.ch/en/loisirs/sport-et-wellness/spas.html](#))

City of Lucerne, Switzerland ([www.luzern.com/en/sports-leisure/wellness](#))

City of Zurich, Switzerland ([www.zuerich.com/en/Visitor/Experience/spa-in-zurich.html](#))

Turkey ([www.goturkeytourism.com/things-to-do/recreation-and-sports-in-turkey.html](#))

United Kingdom

City of Bath, UK ([visitbath.co.uk/spa-and-wellbeing](#))

Asia-Pacific

Australia

City of Melbourne, Australia ([www.visitmelbourne.com/Activities-and-attractions/Spa-and-wellbeing](#))

State of Queensland, Australia ([www.queenslandholidays.com.au/things-to-see-and-do/spa-and-wellness/spa-and-wellness_home.cfm](#))

State of Victoria, Australia ([www.visitvictoria.com/Activities-and-attractions/Spa-and-wellbeing](#))

Bhutan ([www.tourism.gov.bt/activities/spirituality-wellness](#))

Cambodia ([www.tourismcambodia.com/activities/massages-and-spas.htm](#))
and ([www.tourismcambodia.com/activities/meditation.htm](#))

India ([www.incredibleindia.org/trade-product/products/wellness-tourism](#))

State of Kerala, India ([www.keralatourism.org/ayurveda/](#))

Indonesia ([www.indonesia.travel/en/activity/detail/65](#))

Japan ([www.jnto.go.jp/eng/location/interests/hot.html](#))

Laos ([www.tourismlaos.org/show.php?Cont_ID=13](#))

Malaysia ([www.tourism.gov.my/en/Master/Web-Page/Experiences/Big-Day-Out/Spas](#))

Nepal ([welcomenepal.com/promotional/tourist-activities/special-interest/](#))

New Zealand ([www.newzealand.com/us/hot-pools-and-health-spas/](#))

Philippines ([www.tourism.gov.ph/Pages/WellnessServices.aspx](#))

South Korea ([english.visitkorea.or.kr/enu/SI/SI_EN_3_4_3_2.jsp](#))

Taiwan ([eng.taiwan.net.tw/m1.aspx?sNo=0002035](#)) and ([eng.taiwan.net.tw/m1.aspx?sNo=0002036](#))

Thailand ([www.tourismthailand.org/See-and-Do/Activities/Spa-and-Wellness](#))

Latin America

Argentina (www.turismo.gov.ar/eng/menu.htm) and (legacy.argentina.travel/en/authentic/wellness-tourism)

Barbados (www.visitbarbados.org/well-being.aspx)

Chile (www.chile.travel/en/what-to-do/well-being-and-relax.html)

Costa Rica (www.visitcostarica.com/ict/paginas/ictnota.asp?idnota=271)

Dominican Republic (www.godominicanrepublic.com/rd/index.php?option=com_content&view=article&id=117&Itemid=120&lang=en)

Mexico (www.visitmexico.com/en/spa)

Middle East and Africa

Canary Islands (www.turismodecanarias.com/canary-islands-spain/products-holiday-travel/wellness-delight/)

Egypt (en.egypt.travel/product/index/spa-wellness)

Israel (www.goisrael.com/Tourism_Eng/Tourist%20Information/Discover%20Israel/Pages/Health%20Tourism.aspx) and (www.dead-sea-wonder-of-nature.com/)

Jordan (international.visitjordan.com/Whattodo/LeisureWellness.aspx)

Mauritius (www.tourism-mauritius.mu/experience/spa.html)

Morocco (www.visitmorocco.com/index.php/eng/I-enjoy/Health-and-well-being/A-paradise-of-well-being)

Namibia (www.namibiatourism.com.na/wellness/)

South Africa (www.southafrica.net/country/us/en/articles/landing/category/health-wellness)
City of Cape Town, South Africa (www.capetown.travel/activities/category/body-mind-and-spirit)

Franschhoek Wine Valley, South Africa (franschhoek.org.za/wellness/)

Tunisia (www.cometotunisia.co.uk/explore-tunisia/what-to-do/luxury-spas)

North America

United States

State of Arizona, US (www.arizonaguide.com/things-to-do/spas)

State of Arkansas, US (www.arkansas.com/things-to-do/spas/)

City of Eureka Springs, Arkansas, US (www.eurekasprings.com/healing/)

City of Hot Springs, Arkansas, US (www.hotsprings.org/pages/spas-baths/)

State of California, US (www.visitcalifornia.com/Things-To-Do/Spas-and-Wellness/)

City of San Diego, California, US (www.sandiego.org/what-to-do/spas.aspx)

Monterey County, California, US (www.seemonterey.com/things-to-do/spas/)

Sonoma County, California, US (www.sonomacounty.com/activities/spas-wellness)
State of Colorado, US
City of Breckenridge, Colorado, US (www.gobreck.com/what-to-do/spa-and-wellness)
City of Telluride, Colorado, US (www.visittelluride.com/health-wellness)
Vail Valley, Colorado, US (www.visitvailvalley.com/general.asp?id=348)
State of New Hampshire, US (www.visitnh.gov/what-to-do/spas-and-wellbeing/default.aspx)
State of New Mexico, US (www.newmexico.org/relax/)
City of Albuquerque, New Mexico, US (www.itsatrip.org/thingstodo/spa/default.aspx)
City of Santa Fe, New Mexico, US (santafe.org/Pillars/Rejuvenation_and_Relaxation/index.html)
State of New York, US (iloveny.com/what-to-do/reasons-to-love-ny/health-and-wellness)
City of Lake Placid, New York, US (www.lakeplacid.com/do/wellness)
State of North Carolina, US (www.visitnc.com/resorts-spas)
City of Asheville, North Carolina, US (www.exploreasheville.com/things-to-do/spas-wellness/)
State of Rhode Island, US (www.visitrhodeisland.com/what-to-do/spa-resorts/)
State of Vermont, US
City of Stowe, Vermont, US (www.gostowe.com/thingstodo/spas-wellness-a-beauty)

Canada

Province of Alberta, Canada (www.travelalberta.us/things-to-do/cultural/spa-wellness)
Region of Banff/Lake Louise, Alberta, Canada (www.banfflakelouise.com/Things-To-Do/Spa-Wellness)
Province of British Columbia, Canada (www.hellobc.com/british-columbia/trip-ideas/hotsprings)
Town of Whistler, British Columbia, Canada (www.whistler.com/wellness/)
Province of Ontario, Canada (www.ontariotravel.net/TCISSegmentsWeb/gn/thingsToDo/WellnessRelaxation.xhtml?language=en)
City of Niagara Falls, Ontario, Canada (www.niagarafallstourism.com/play/spas/)
Province of Quebec, Canada (www.bonjourquebec.com/qc-en/vacancesante0.html)

Appendix B: Wellness Tourism Data Tables

Wellness Tourism By Region (2012)

	Trips			Market Size		Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expendit.* (\$ millions)	Wellness Tourism as a % of Total Tourism Market*	Wellness Tourism Direct	Wellness Tourism Economic Impact (\$ millions)
North America	162,968.2	9,664.1	153,304.1	\$180,981.4	20%	2,346,825	\$571,491.6
Europe	202,747.0	46,781.2	155,965.9	\$158,438.7	17%	2,414,490	\$451,707.3
Asia-Pacific	119,998.2	16,262.4	103,735.8	\$69,425.6	7%	5,649,561	\$213,830.1
Latin America	31,740.9	9,110.1	22,630.9	\$22,381.2	9%	924,205	\$57,994.5
Middle East-North Africa	4,764.1	3,012.5	1,751.6	\$5,289.1	6%	211,798	\$13,386.2
Sub-Saharan Africa	2,213.5	1,330.1	883.4	\$2,040.4	6%	136,966	\$6,076.0

* Includes both international/inbound and domestic wellness tourism spending.
All figures include both primary purpose and secondary purpose wellness tourism.
Estimates by SRI International.

Top Wellness Tourism Countries (2012)

	Trips			Market Size		Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expendit.* (\$ millions)	Wellness Tourism as a % of Total Tourism Market*	Wellness Tourism Direct	Wellness Tourism Economic Impact (\$ millions)
United States	141,368.4	7,103.2	134,265.2	\$167,139.9	20%	2,122,651	\$513,761.3
Germany	49,254.9	5,623.4	43,631.4	\$42,198.8	33%	559,038	\$117,107.1
Japan	34,414.8	1,171.1	33,243.7	\$28,565.7	18%	313,583	\$89,444.1
France	27,255.7	6,900.3	20,355.5	\$24,079.5	14%	287,172	\$61,249.7
Austria	11,289.1	5,675.0	5,614.1	\$14,033.7	47%	160,503	\$38,802.4
Canada	21,599.8	2,560.9	19,038.9	\$13,841.5	27%	224,174	\$57,730.3
UK	17,837.5	3,633.6	14,203.9	\$12,260.1	18%	208,674	\$35,375.8
Italy	8,081.0	1,566.3	6,514.7	\$11,697.1	10%	156,966	\$29,545.5
Switzerland	10,151.6	5,101.8	5,049.7	\$11,389.2	61%	113,577	\$39,779.4
Mexico	11,387.8	4,615.6	6,772.2	\$8,893.7	8%	416,462	\$19,235.1
China	23,581.0	2,064.4	21,516.6	\$7,783.9	2%	822,322	\$27,337.0
Spain	9,954.3	2,602.7	7,351.6	\$7,605.4	8%	92,804	\$21,327.1
South Korea	18,543.4	1,578.4	16,965.0	\$5,630.1	21%	147,011	\$15,903.7
Thailand	5,804.5	3,090.8	2,713.7	\$5,553.9	16%	422,741	\$12,759.7
Australia	4,143.2	452.9	3,690.3	\$4,989.1	7%	65,790	\$20,583.5
India	21,061.7	1,029.4	20,032.3	\$4,651.6	8%	3,245,415	\$15,472.1
Russia	9,989.9	1,304.0	8,686.0	\$3,807.1	12%	132,978	\$15,800.7
Portugal	3,441.8	1,419.7	2,022.1	\$3,419.7	18%	92,462	\$9,626.8
Greece	4,471.6	1,835.1	2,636.5	\$3,307.3	20%	71,148	\$8,363.2
Turkey	6,655.5	2,065.7	4,589.8	\$3,239.6	13%	51,985	\$8,745.4
Denmark	5,814.6	1,153.0	4,661.6	\$3,123.8	24%	38,344	\$10,528.3
Sweden	2,621.4	214.5	2,406.9	\$2,535.9	6%	32,712	\$10,187.6
Norway	2,299.4	338.0	1,961.4	\$2,223.9	16%	17,350	\$5,000.5
Brazil	5,282.5	86.3	5,196.2	\$2,210.0	4%	84,747	\$5,906.6
Hong Kong	1,328.0	1,327.6	0.4	\$2,155.4	9%	31,659	\$4,960.2
Finland	3,823.4	334.7	3,488.7	\$2,090.2	15%	21,427	\$6,220.6
Poland	5,187.9	982.8	4,205.0	\$2,050.4	15%	65,743	\$5,251.2
Malaysia	2,381.7	1,069.1	1,312.6	\$1,876.4	5%	71,982	\$4,204.9
Singapore	1,257.5	1,255.0	2.5	\$1,722.5	9%	17,141	\$3,719.9
Argentina	2,282.7	173.5	2,109.2	\$1,588.1	11%	58,176	\$4,493.0
Taiwan	2,035.1	406.6	1,628.5	\$1,565.0	7%	42,459	\$4,169.0
Ireland	2,946.8	1,179.1	1,767.7	\$1,557.8	29%	14,323	\$6,588.4

* Includes both international/inbound and domestic wellness tourism spending.

All figures include both primary purpose and secondary purpose wellness tourism.

Estimates by SRI International.

Top Wellness Tourism Countries (2012) - continued

	Trips			Market Size		Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expendit.* (\$ millions)	Wellness Tourism as a % of Total Tourism Market*	Wellness Tourism Direct	Wellness Tourism Economic Impact (\$ millions)
South Africa	1,489.7	665.9	823.8	\$1,487.3	10%	75,671	\$4,601.2
Puerto Rico	2,004.8	206.1	**1,798.7	\$1,482.1	34%	12,185	\$4,147.4
Netherlands	1,530.3	272.7	1,257.5	\$1,479.2	4%	46,438	\$4,157.6
UAE	779.4	603.6	175.8	\$1,410.4	8%	9,133	\$3,042.7
New Zealand	2,060.8	208.3	1,852.5	\$1,311.9	13%	30,940	\$5,800.1
Dominic. Rep.	876.4	867.1	9.2	\$1,165.3	26%	73,854	\$3,745.6
Hungary	4,478.4	992.9	3,485.5	\$1,103.0	23%	46,669	\$2,848.6
Czech Republic	3,883.2	909.1	2,974.2	\$1,059.9	14%	48,421	\$3,160.6
Indonesia	829.4	629.0	200.5	\$992.0	10%	111,009	\$2,969.8
Israel	630.8	262.1	368.7	\$973.2	12%	14,387	\$3,241.0
Chile	2,891.3	210.8	2,680.4	\$848.8	15%	24,089	\$2,392.2
Morocco	837.9	464.2	373.7	\$824.0	8%	80,247	\$1,775.4
Croatia	1,034.6	767.2	267.3	\$707.2	13%	16,654	\$1,655.3
Egypt	939.8	593.4	346.4	\$702.1	8%	56,555	\$1,544.9
Belgium	610.6	260.5	350.1	\$699.8	6%	7,025	\$1,749.2
Bahamas	255.2	252.6	2.6	\$624.6	23%	18,821	\$1,375.3
Jamaica	404.9	400.7	4.2	\$602.0	27%	42,852	\$1,971.0
Peru	771.3	125.0	646.3	\$511.6	6%	22,866	\$1,349.9
Ukraine	4,862.9	484.8	4,378.1	\$479.2	7%	51,759	\$1,765.7
Philippines	539.8	375.4	164.4	\$478.7	8%	71,414	\$1,645.1
Iceland	276.9	163.6	113.3	\$469.5	33%	5,608	\$1,634.7
Macau	134.7	134.7	0.0	\$420.0	1%	3,856	\$836.0
Venezuela	1,273.5	20.4	1,253.1	\$410.5	6%	11,309	\$1,134.1
Colombia	668.7	50.4	618.3	\$400.5	5%	28,238	\$1,271.9
Maldives	381.0	375.9	5.1	\$372.1	62%	21,032	\$808.2
Fiji	303.0	302.6	0.4	\$351.8	68%	27,217	\$964.7
Jordan	339.3	271.9	67.4	\$327.6	11%	15,809	\$1,218.4
Uruguay	1,073.5	165.4	908.1	\$309.0	11%	9,592	\$898.3
Neth. Antilles	144.6	143.2	1.5	\$260.3	NA	3,014	\$785.3
Costa Rica	162.9	155.8	7.1	\$256.8	11%	10,917	\$655.3
Tunisia	481.9	354.5	127.4	\$252.1	15%	16,872	\$526.3

* Includes both international/inbound and domestic wellness tourism spending.

** Includes visitors from the United States.

All figures include both primary purpose and secondary purpose wellness tourism.

Estimates by SRI International.

Top Wellness Tourism Countries (2012) - continued

	Trips			Market Size		Economic Impact	
	Total Wellness Arrivals/ Trips (000s)	Intl./ Inbound Wellness Arrivals (000s)	Domestic Wellness Trips (000s)	Wellness Tourism Receipts/ Expendit.* (\$ millions)	Wellness Tourism as a % of Total Tourism Market*	Wellness Tourism Direct	Wellness Tourism Economic Impact (\$ millions)
Aruba	102.9	101.9	1.0	\$225.8	16%	4,860	\$713.8
Barbados	85.6	84.7	0.9	\$220.4	19%	6,058	\$731.8
Vietnam	471.1	188.4	282.6	\$200.8	3%	59,014	\$418.1

* Includes both international/inbound and domestic wellness tourism spending.
All figures include both primary purpose and secondary purpose wellness tourism.
Estimates by SRI International.

Appendix C: Glossary Of Tourism & Spa Terminology

Tourism Data Terminology

Tourism: A social, cultural, and economic phenomenon that entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.⁴¹

Visitor: A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure, or other personal purpose) other than to be employed by a resident entity in the country or place visited. A visitor (domestic, inbound, or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay; otherwise, he/she is considered a same-day visitor (or excursionist).⁴²

Tourist: A tourist is a visitor whose trip includes an overnight stay. The wellness tourism data presented in this report includes tourists (overnight visitors) but not same-day visitors.

Forms of tourism: There are three basic forms of tourism: ***inbound (international) tourism, domestic tourism,*** and ***outbound tourism.***⁴³

Inbound (International) Tourism: Inbound tourism comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.

- **Inbound Tourism Arrivals:** Arrivals refers to international tourists visiting another country for at least 24 hours, for a period not exceeding 12 months, and staying in collective or private accommodation for leisure, business, visiting friends/family and other purposes including religious, medical, education. The data on inbound tourists refer to the number of arrivals, not to the number of people traveling. Thus a person who makes several trips to a country during a given period is counted each time as a new arrival. An inbound trip starts as soon as an international tourist enters another country until they leave again. Trips to second homes are included. Arrival figures exclude trips made by same-day visitors, transit passengers and cruise passengers as this can distort arrival figures in important border crossings and cruise destinations respectively. It also excludes those in paid employment abroad. Military personnel and diplomats are excluded, along with displaced people because of war or natural disasters. Transportation crew for air, rail, land, and sea are excluded. Students that stay in a country for a period of more than 12 months are excluded from arrivals data and are considered as residents of the country of temporary residence. Short-term students are counted under arrivals.⁴⁴

⁴¹ UNWTO, Understanding Tourism: Basic Glossary, media.unwto.org/en/content/understanding-tourism-basic-glossary.

⁴² Ibid.

⁴³ Ibid.

⁴⁴ Euromonitor International.

- **Inbound Tourism Receipts:** Inbound tourist receipts are classified as payments by international inbound tourists (arrivals) for business and leisure purposes, including fares paid to national carriers for international transport and any other prepayments made for goods or services received in the country of destination. This includes receipts from day visitors from abroad, although there are exceptional cases that are recorded separately. It excludes spending by students who stay in a country for a period of over 12 months. Airfare paid to foreign carriers is excluded for the country under review, but accounted for in the foreign carriers' country of origin.⁴⁵

Domestic Tourism: Comprises the activities of a resident visitor within the country of reference.

- **Domestic Tourism Trips:** Domestic trips refers to the number of trips taken by residents of the country within the country of residence. Multiple destinations may be included in a single trip, although the overall destination is recorded as the main destination. Trips over 24 hours are to be included, so day trips are excluded. Trips refer to single person trips, not multiple person trips. Domestic cruise passengers are included.⁴⁶
- **Domestic Tourism Expenditures:** Domestic tourist expenditure refers to the spending on travel and tourism services by domestic visitors on their trips. It includes travel within the country. Domestic tourism expenditure covers spending for business and leisure purposes. Business includes expenditure by group and MICE tourism, considered to be managed business booked via corporate business travel retailers acting as a third party; and independent or transient business defined as unmanaged business that is booked via travel retailers or direct suppliers. Leisure includes expenditure by all leisure visitors, including those visiting friends/relatives and others.⁴⁷

Outbound Tourism: Comprises the activities of a resident visitor outside the country of reference.

- **Outbound Tourism Departures:** Departures refers to the number of residents that travel abroad from their country of residence to another country for leisure or business purposes. Multiple destinations may be included in a single trip, although the main departure destination is recorded at the country of residence of the outbound traveller. Data include foreigners residing permanently in the country of departure including students residing for over a period of one year. Figures exclude outbound trips by same-day visitors, transit passengers and cruise passengers as this can distort departure figures in important border crossings and cruise destinations respectively. Military personnel and diplomats are excluded, along with displaced people because of war or natural disasters. Transportation crew for air, rail, land, and sea are excluded.⁴⁸

⁴⁵ Ibid.

⁴⁶ Euromonitor International.

⁴⁷ Ibid.

⁴⁸ Ibid.

- **Outbound Tourism Expenditures:** Outgoing tourist expenditure includes spending by outbound tourists abroad (departures) for business and leisure purposes, including their payments to foreign carriers for international transport. This includes expenditure on day visits abroad, except in certain cases when these are recorded separately. Data exclude international transport fares purchased within the country of origin.⁴⁹

Spa Market Terminology

Spa: Establishments that promote wellness through the provision of therapeutic and other professional services aimed at renewing the body, mind, and spirit.⁵⁰

Destination Spa: Offer a full-immersion spa experience in which all guests participate. All-inclusive programs provide various spa and body treatments along with a myriad of other offerings such as: fitness activities, healthy cuisine, educational classes, nutrition counseling, weight loss programs, preventive or curative medical services, mind/body/spirit offerings, etc. Traditional European-style health resorts and sanatoria, as well as Indian Ayurvedic resorts, are included in the same category as destination spas because of their similar business structures (e.g., overnight stays in which all guests participate in a full-immersion spa and wellness-based activities).⁵¹

Spa Tourism: An overnight trip, either within or outside of a person's country of residence, in which the person's motivation for the trip includes the enjoyment of spa services or treatments.⁵²

Niche Tourism Terminology

Adventure Tourism: Defined by the Adventure Travel Trade Association as a trip that involves two of the following three elements: (1) interaction with nature or (2) interaction with culture or (3) a physical activity, while the core of adventure is a trip that involves all three elements. Adventure travel activities include "hard" adventure (e.g., climbing, caving, paragliding, trekking) and "soft" adventure (e.g., birdwatching, camping, hiking, cycling).⁵³

Agritourism: Travel to a farm or rural setting to enjoy farm-raised or produced products and participate in farm-related natural, cultural, and outdoor activities. Agritourism is a subset of *rural tourism*.⁵⁴

Culinary Tourism: "Trips during which the purchase or consumption of regional foods (including beverages), or the observation and study of food production (from agriculture to cooking schools), represent a significant motivation or activity." Culinary travel activities may include: traditional or

⁴⁹ Ibid.

⁵⁰ SRI International, The Global Spa Economy 2007, May 2008, www.globalspaandwellnesssummit.org/images/stories/pdf/gss.spa.economy.report.2008.pdf.

⁵¹ Ibid.

⁵² Ibid.

⁵³ See: www.adventuretravel.biz/wp-content/uploads/2012/11/atdi_2011_report.pdf and files.adventuretravel.biz/docs/research/adventure-tourism-market-study-2013-web.pdf.

⁵⁴ See: www.agmrc.org/media/cms/Agritourim_Laux_and_Pike_BD8CEC9D77D92.pdf.

high quality dining experiences, food/wine festivals and events, cooking schools, tasting/buying local products/farmer's markets, wine tasting, fruit picking, etc.⁵⁵

Cultural Tourism: "Traveling to experience the places and activities that authentically represent the stories and people of the past and present. It includes irreplaceable historic, cultural and natural resources." Cultural tourism activities may include things such as: art galleries, theater, and museums; historic sites, communities, and landmarks; cultural events, festivals, and fairs; ethnic communities and neighborhoods; and architectural and archaeological treasures.⁵⁶

Ecotourism: Defined by The International Ecotourism Society as "responsible travel to natural areas that conserves the environment and improves the well-being of local people." Those who implement and participate in ecotourism activities should follow the following principles: minimize impact; build environmental and cultural awareness and respect; provide positive experiences for both visitors and hosts; provide direct financial benefits for conservation; provide financial benefits and empowerment for local people; and raise sensitivity to host countries' political, environmental, and social climate.⁵⁷ Ecotourism is considered to be a form of sustainable tourism.

- **Sustainable Tourism:** Defined by the UNWTO as "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities."⁵⁸
- **Responsible Tourism:** Responsible tourism is any form of tourism that can be consumed in a more responsible way (and is similar to sustainable tourism). According to the 2002 Cape Town Declaration, responsible tourism: "minimizes negative social, economic and environmental impacts; generates greater economic benefits for local people and enhances the well-being of host communities; improves working conditions and access to the industry; involves local people in decisions that affect their lives and life chances; makes positive contributions to the conservation of natural and cultural heritage embracing diversity; provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues; provides access for physically challenged people; is culturally sensitive, encourages respect between tourists and hosts, and builds local pride and confidence."⁵⁹
- **Geotourism:** Defined by National Geographic as "tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well-being of its residents... Geotourism adds to sustainability principles by building on a

⁵⁵ See: scholarworks.umass.edu/refereed/ICHRIE_2011/Friday/15/.

⁵⁶ See: culturalheritagetourism.org/documents/2012CHTFactSheet_000.pdf and www.culturalheritagetourism.org/resources/visitorProfile.htm.

⁵⁷ See: www.ecotourism.org/what-is-ecotourism.

⁵⁸ See: sdt.unwto.org/en/content/about-us-5.

⁵⁹ Ibid.

destination's geographical character, its "sense of place," to emphasize the distinctiveness of its locale and benefit visitor and resident alike."⁶⁰

Medical Tourism: People who travel to a different place to receive treatment for a disease, ailment, or condition, and who are seeking lower cost of care, higher quality of care, better access to care, or different care than what they could receive at home.⁶¹ Typically does not include in-country expatriates, tourists in need of emergency medical care, companions accompanying medical travelers, or multiple patient episodes that occur over the course of one trip.⁶²

Rural Tourism: Travel to rural areas or the countryside, to experience rural life, art, culture, and heritage.⁶³ Rural tourism is often considered to be a subset of *ecotourism* or *sustainable tourism*.

Spiritual/Religious Tourism: Travel with the motivation to participate in religious/faith-based experiences and activities, including pilgrimages; missionary travel; religious events, conferences, and camps; visiting holy sites; spiritual retreats; monastery stays; faith-based cruises, etc.⁶⁴

Sports Tourism: Travel to observe or participate in a sporting event or activity. Includes *hard sports tourism* (participating in competitive sporting events, such as team sports, marathons and races, etc.), *soft sports tourism* (participating in recreational/leisure sporting activities such as hiking, skiing, boating, golf, etc.), and *sports events tourism* (viewing a sporting event, such as the World Cup or Olympic Games).⁶⁵

Voluntourism: The intersection volunteering and tourism; travel that includes volunteering for a charitable cause (and the traveler is not remunerated for the work).⁶⁶

⁶⁰ See: travel.nationalgeographic.com/travel/sustainable/about_geotourism.html.

⁶¹ Johnston, Puczkó, Smith, and Ellis, Wellness Tourism and Medical Tourism: Where Do Spas Fit?, May 2011, www.globalspaandwellnesssummit.org/images/stories/pdf/spas_wellness_medical_tourism_report_final.pdf.

⁶² See: www.patientsbeyondborders.com/medical-tourism-statistics-facts.

⁶³ See: tourism.gov.in/writereaddata/Uploaded/Guideline/072020110330849.pdf and www.oecd.org/industry/tourism/2755218.pdf.

⁶⁴ See: www.travelmarketreport.com/leisure?articleID=4545&LP=1.

⁶⁵ See: www.tourism-review.com/travel-tourism-magazine-sports-tourism-worldwide-phenomenon-article1330; www.tandfonline.com/doi/abs/10.1080/026143698375213#preview; and www.tandfonline.com/doi/abs/10.1080/14775080306236?journalCode=rjto20#preview.

⁶⁶ See: akhost.chacha.com/chacha.com/infographics/voluntourism.pdf and www.voluntourism.org/resources.html.

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Industry Research Partners



Massage Envy Spa is privileged to be a sponsor for the Global Spa and Wellness Summit because of the Summit delegates' strategic leadership and innovation, activism in promoting health and wellness and commitment to the future growth of spa worldwide.

– CG Funk, Vice President of Industry Relations & Product Development



At JHANA we are dedicated to establishing a harmonious balance between East and West for the integration of healing, mindfulness, meditation and yoga and the role they play within the spa industry. We are excited to support GSWS research initiatives as it substantiates the role these components can have on wellness, healing and spirituality within the spa industry from inside – out.

– Felix Lopez, Founder



Lighting Science has a mission to unleash the science of lighting to make people and our planet look, feel and heal better. We believe the mission of the GSWS is similar and is synergistic with our goal of empowering people and the planet toward optimal health and wellness. It's a partnership that makes so much sense for us on many levels.

– Jeremy Cage, CEO



At Elizabeth Arden Red Door Spa, we strive to enhance peoples' lives through beauty, harmony, and well-being. Elizabeth Arden founded the company over 100 years ago on the fundamental belief that for a woman to be beautiful on the outside, she must first feel beautiful on the inside. To us, "spa" is wellness. We are proud to support GSWS's research that promotes this belief and our industry."

– Todd Walter, President & CEO

Industry Research Partners



At SpaFinder Wellness 365, we see growing demand for consumers who want to keep well every day, including when they travel. Whether for business or pleasure, people appear increasingly interested in maintaining healthier lifestyles on the road, and we believe our industry can benefit from better understanding who they are, where they go and why.

– Mia Kyricos, Chief Brand Officer



The most powerful message is the one substantiated by credible research. WTS International and its 2,000 employees worldwide stand behind the GSWS efforts in conveying a call for action behind the advancement of wellness and its positive effect in all of our lives and the health of our communities.

– Alfredo Carvajal, Chief Operating Officer



Successful hospitals of the future will be those that will engage in body work, demonstrating the ability to integrate the science of mind, body and spirit. It's complimentary, alternative and integrative wellness. Thomas Edison (1847-1931) wrote, "The Doctor of the future will give no medicine, but will interest his or her patient in the care of the human frame in a proper diet and in the cause and prevention of disease." The GSWS- SRI Research Report on The Global Wellness Tourism Economy can be a progressive platform which supports the consumer's will to be proactive about using preventative care, with the integration of global wellness options and its impact on economic growth of hospitals, physicians, spas, wellness retreats, travel and home care.

– Desiree Watson, President

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