

Wellness, Spas, Health & Travel 2030

*Regional and Country
Outlook post-COVID19*



Contents

Acknowledgements	2	Asia & Middle East	49
Study Partners	5	Far East	52
The Pillars of Wellness	6	South-East Asia	58
The Triggers of Wellness	8	The Middle East	63
Importance of Wellness Travel	10	The Americas	67
Key Segments for Wellness Travel	12	North America	69
Trending Facilities/Properties	14	North America/Leisure Travel	73
Trending Treatments	16	North America/Business Travel	76
Future of Medical Travel	18	Central America & the Caribbean	77
		South America	82
Country Overviews	21	Africa	88
Europe	23	Australia, New Zealand & the Pacific	93
Northern Europe	26	The Bottom Line	97
Western Europe	30		
Central & Eastern Europe	36		
Southern Europe	43		

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Acknowledgements

This is the final report of the **Wellness, Health & Travel 2030: Regional and country outlook post-COVID19 Study**.

The study is the initiative of HTWWLife with close cooperation with the Wellness Tourism Association, the International Medical Travel Journal and the 41 international experts.

HTWWLife sincerely thanks every expert for their support and insights! We are proud that we can celebrate the colourful world health, wellness and travel together.

László Puczkó
INSPIRUPTION

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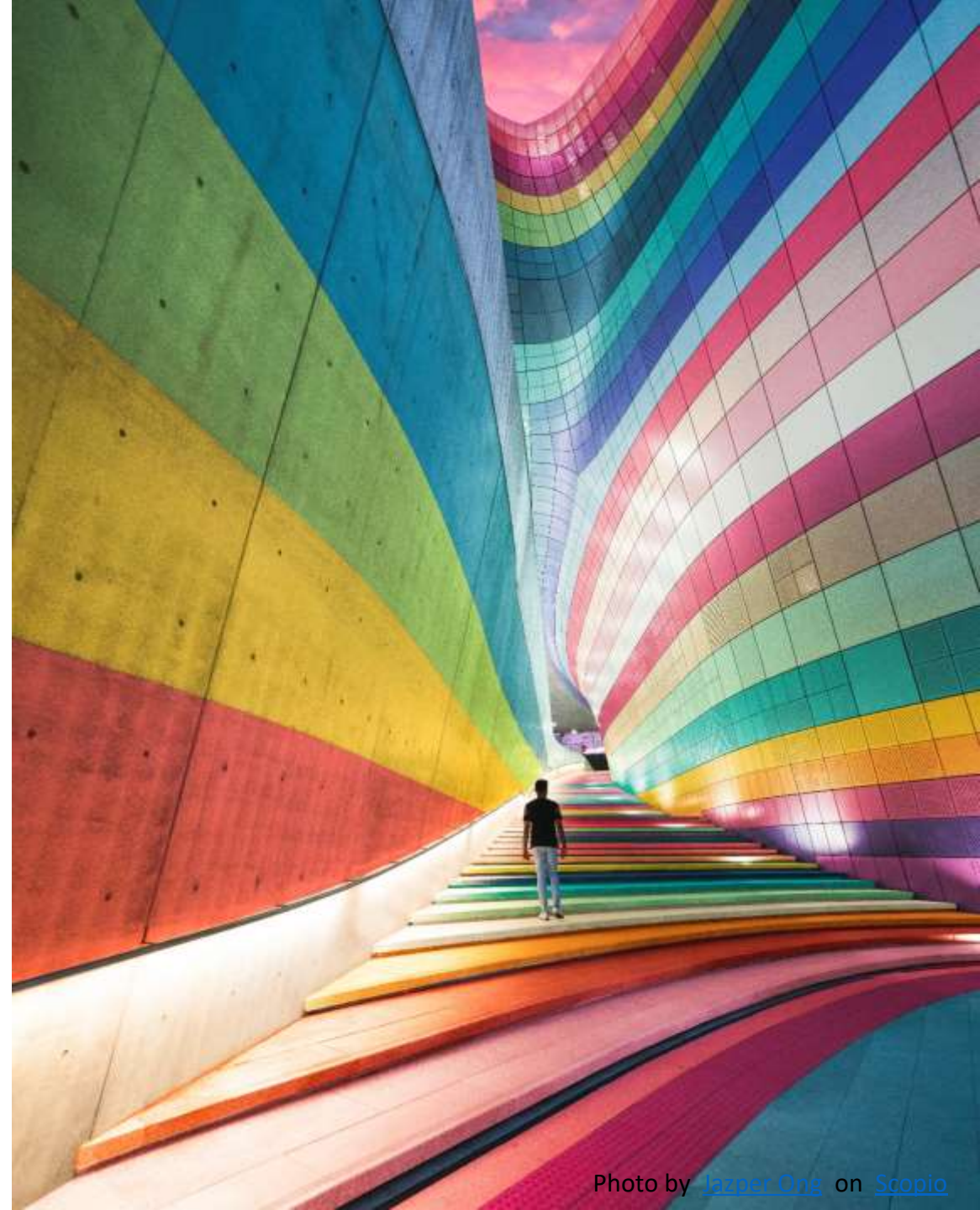


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Wellness, Health & Travel 2030: Intelligence based on Surveys


The team of HTWWLife together with industry partners, i.e. the Wellness Tourism Association and the International Medical Travel Journal ran a series of surveys in 2020. HTWWLife's aim was to identify the main global and regional trends experts envisage in wellness and healthcare motivated travel by 2025-2030 post-COVID19. We interviewed representatives of various wellness, spa, hospitality, wellness travel, healthcare and medical businesses, as well as the leading academic researchers.

The **Wellness Travel 2030 Study** (accessible [here](#)) had three streams during the COVID19 pandemic:

1. We interviewed key representatives of the academic community who have been actively researching the relationships between wellness, wellbeing and travel (59 respondents from 24 countries).
2. We spoke to the wellness tourism industry professionals working in hospitality, in spas, in holistic retreats and wellness hotels and resorts (131 respondents from 25 countries).
3. We talked to healthcare and medical travel industry representatives asking them about how the pandemic may affect medical travel (61 respondents from 25 countries). The summary of the IMTJ/HTWWLife medical travel survey can be found [here](#).

In addition to the Wellness Travel 2030 Survey the Wellness Tourism Association surveyed nearly 4,000 consumers. The key findings of this study can be accessed [here](#).





HTWWLife is dedicated to explore and map how wellbeing, healthcare, hospitality and travel merge and develop. We are pleased to launch the **Wellness, Health & Travel 2030: Country & Regional Overview Post-pandemic Study**.

In this study 41 wellness, healthcare and travel experts from **40** countries & regions provide a commentary over the global research data.

The experts applied and adapted the global and regional forecasts to their own country's and field's situation and formulated the trend relevant forecasts.



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We Thank Our Survey Partners!



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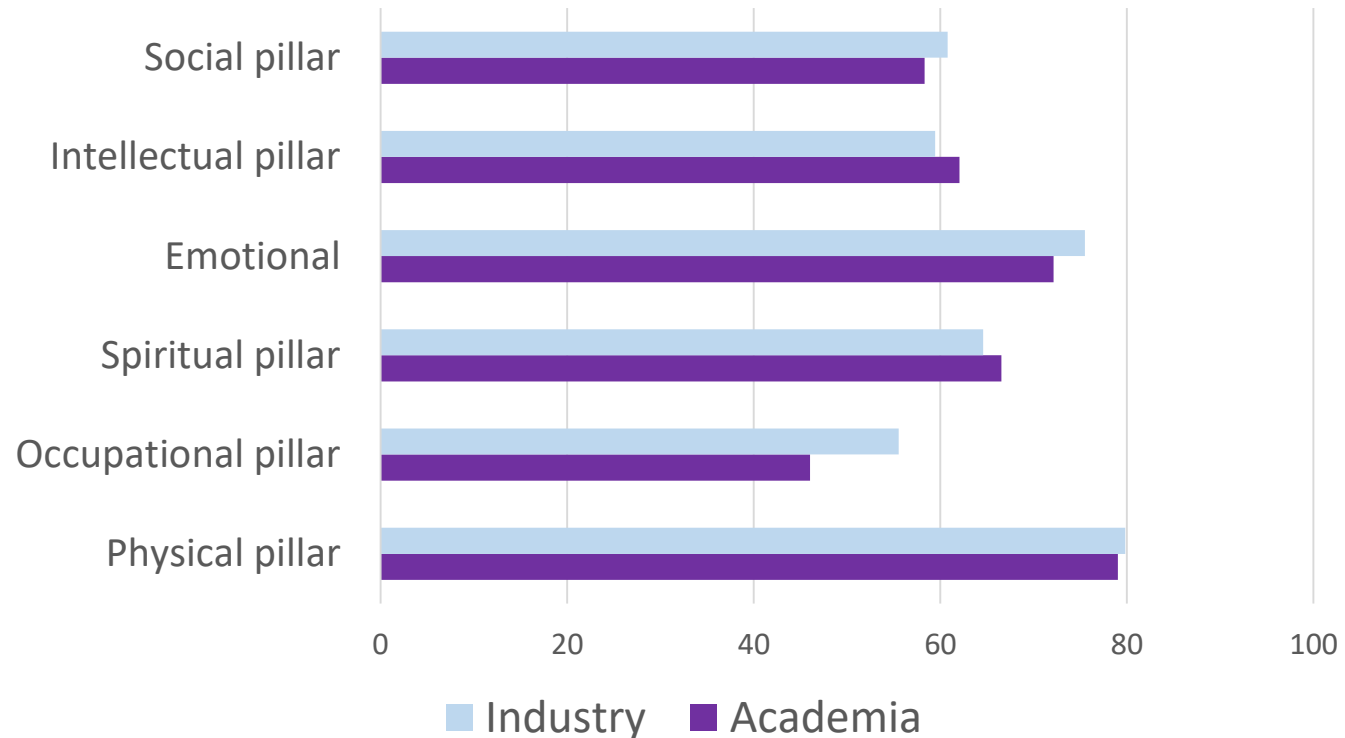
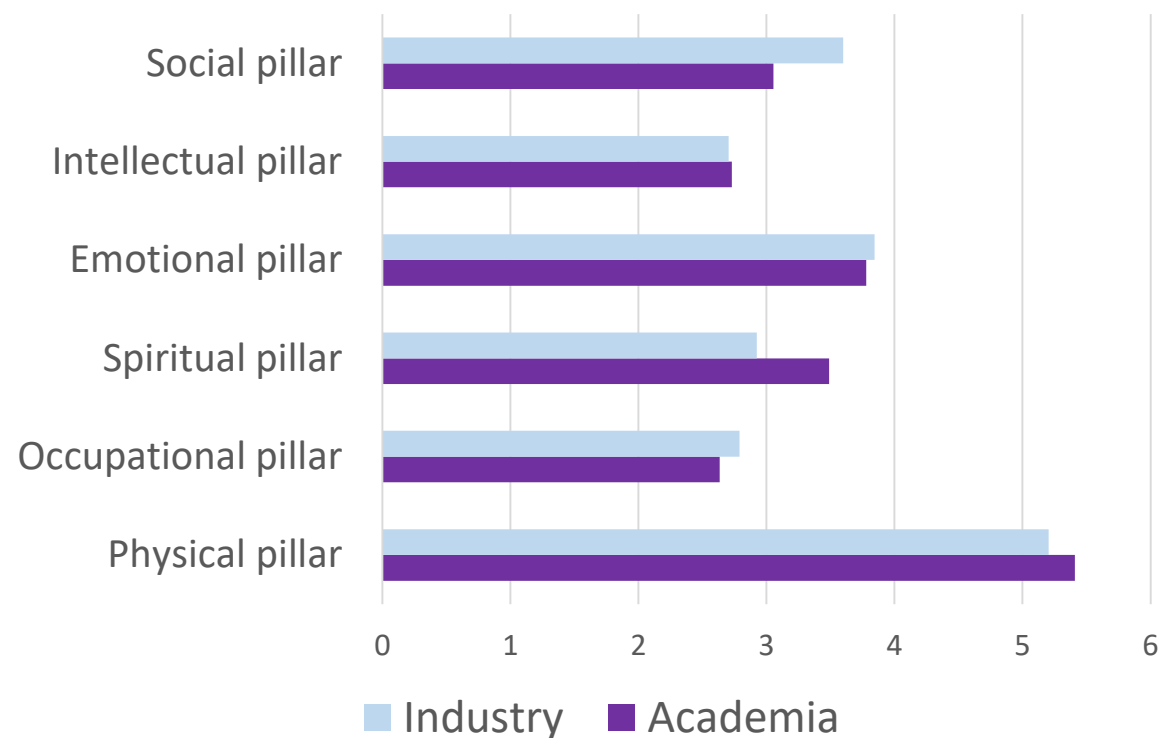
The Pillars of Wellness





Attention Given to Pillars

Currently & Should be post-COVID19



It is understood that wellness has six pillars: Physical, Social, Intellectual, Occupational/Workplace, Spiritual, and Emotional. In an ideal scenario as a basic rule every pillar should be given almost equal attention. According to individual situations and needs one or more pillars may receive special attention.

It is clear that both industry and academia representatives believe that the services, treatments and programmes should apply a more balanced approach.

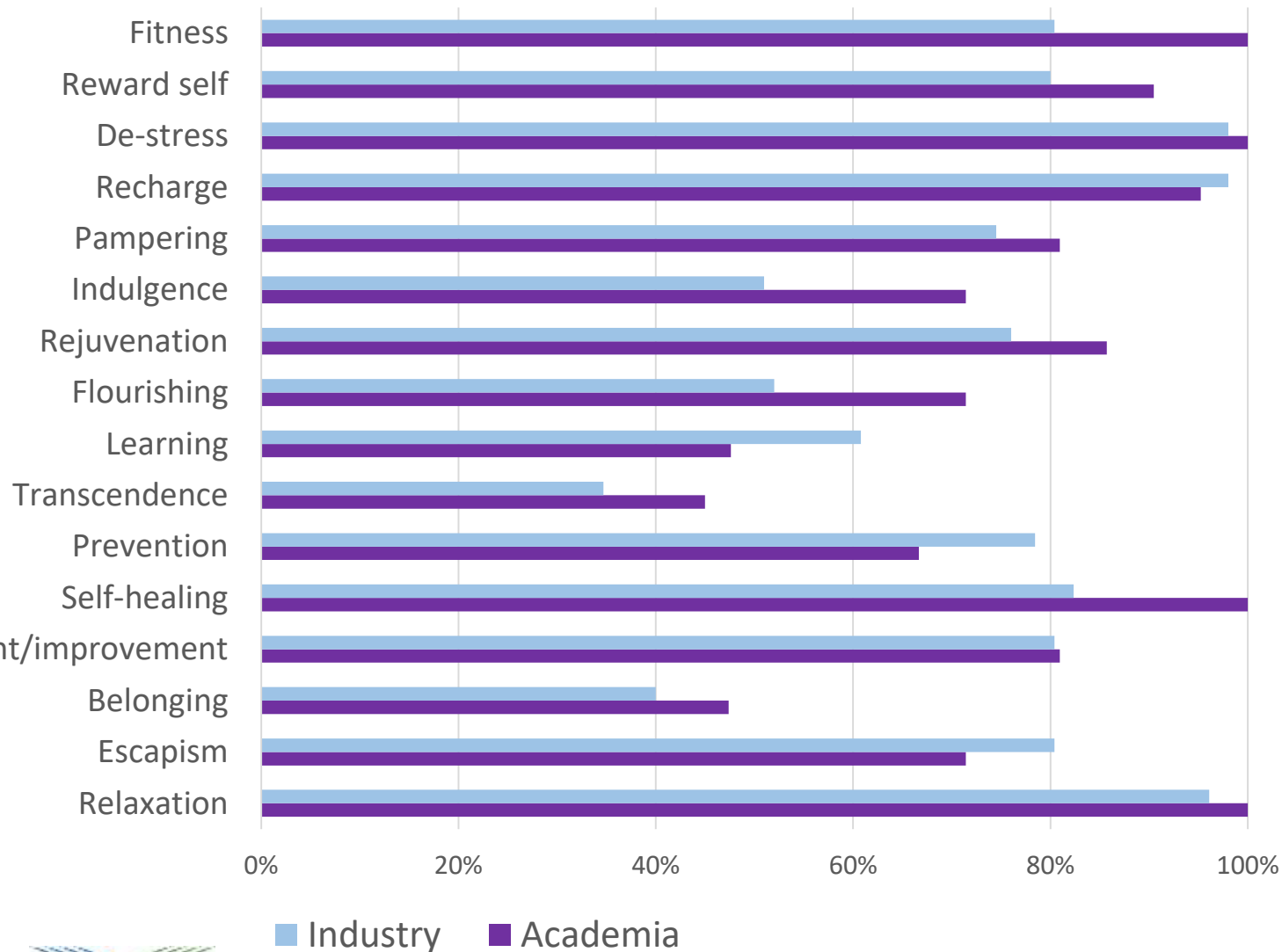
* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



The Triggers of Wellness



Triggers Creating Demand for Wellness



The global research paid special attention to learning more about the triggers that generate demand for wellness and for wellness travel.

Triggers are the very foundations of any decision, therefore, it is essential for wellness travel providers and organizers to map which triggers can generate wellness travel demand.

Apart from the obvious choices such as de-stress or relaxation, we can see a long list of triggers that can generate demand for wellness travel.

Solving the complex task of mapping motivations and expectations would benefit from a closer cooperation between industry and academia research initiatives. As a summary we can state that the key triggers are for:

- **Industry:** Prevention & Learning
- **Academia:** Self-healing, Rewarding self & Fitness



Importance of Wellness Travel





Importance of Wellness in Travel

Industry Observation

- Domestic Trips
 - #1 Western Europe
 - #2 Northern Europe
 - #3 Central & Eastern Europe
- International Trips
 - #1 Central & Eastern Europe
 - #2 South-East Asia
 - #3 Western Europe

Academia Observation

- Domestic Trips
 - #1 Western Europe
 - #2 Northern Europe
 - #3 Central & Eastern Europe
- International Trips
 - #1 Central & Eastern Europe
 - #2 Western Europe
 - #3 South-East Asia

It is widely assumed that wellness travel is growing at an exponential rate. There certainly is a large number of facility/property types, as well as treatments and services that can represent growth potential.

Still, we can state that one-size-does-not-fit-all.

It is very likely that certain wellness facility/property types represent growth potential only in certain regions and countries. The same is true for treatments and services.

Developers, operators and marketers should analyse relevant market intelligence very carefully. It is understood that wellness-motivated travel may not play a similar role in every country or region. This is what is discussed in the country & region specific data of this study!

It appears to be clear that in most European countries, domestic wellness travel is important as well as is intra-European travel, which is very much an expected assumption post-COVID19.

South-East Asia is considered to be a popular region for international wellness travellers. North-America can qualify in the TOP5 regions, as well as Central-America.

Destinations need to do more about introducing their wellness offers, since respondents state that they do not know much about many regions in terms of wellness assets and offers. Consult the Destination Wellbeing Landscape approach from Health Tourism Worldwide for more insights and inspiration!

* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study





Key Segments for Wellness Travel





Key Market Segments

Industry Opinion

- #1 Couples
- #2 Guests looking for healthy options
- #3 Groups of Friends

Academia Opinion

- #1 Couples
- #2 Guests looking for healthy options
- #3 Solo women

Those days have long gone when solo women were the only main market for wellness trips. Wellness experiences are now enjoyed together with partners and friends. It is rather telling that the second most important segment is those who are looking for health options and alternatives. Marketers, operators and developers need to expand their understanding and horizon about what they introduce to guests and how they do it. Almost any kind of traveller can become interested in wellness-improving healthy or healthier alternatives and options. Families as target segments are consistently in the TOP 5 key segments in every region.

Having said that, the market differences are the most distinctive in terms of market segments interested in wellness, especially in North-America, Middle-East and the Far East.

North America

Industry

- #1 Solo women
- #2 Corporate groups
- #3 Couples

Academia

- #1 Guests looking for healthy options
- #2 Solo women
- #3 Same-sex couples

Middle-East

Industry

- #1 Guests looking for healthy options
- #2 Couples
- #3 Groups of friends & Solo men

Academia

- #1 Guests looking for healthy options
- #2 Couples
- #3 Solo men

Far East

Industry

- #1 Couples
- #2 Families with children
- #3 Groups of friends

Academia

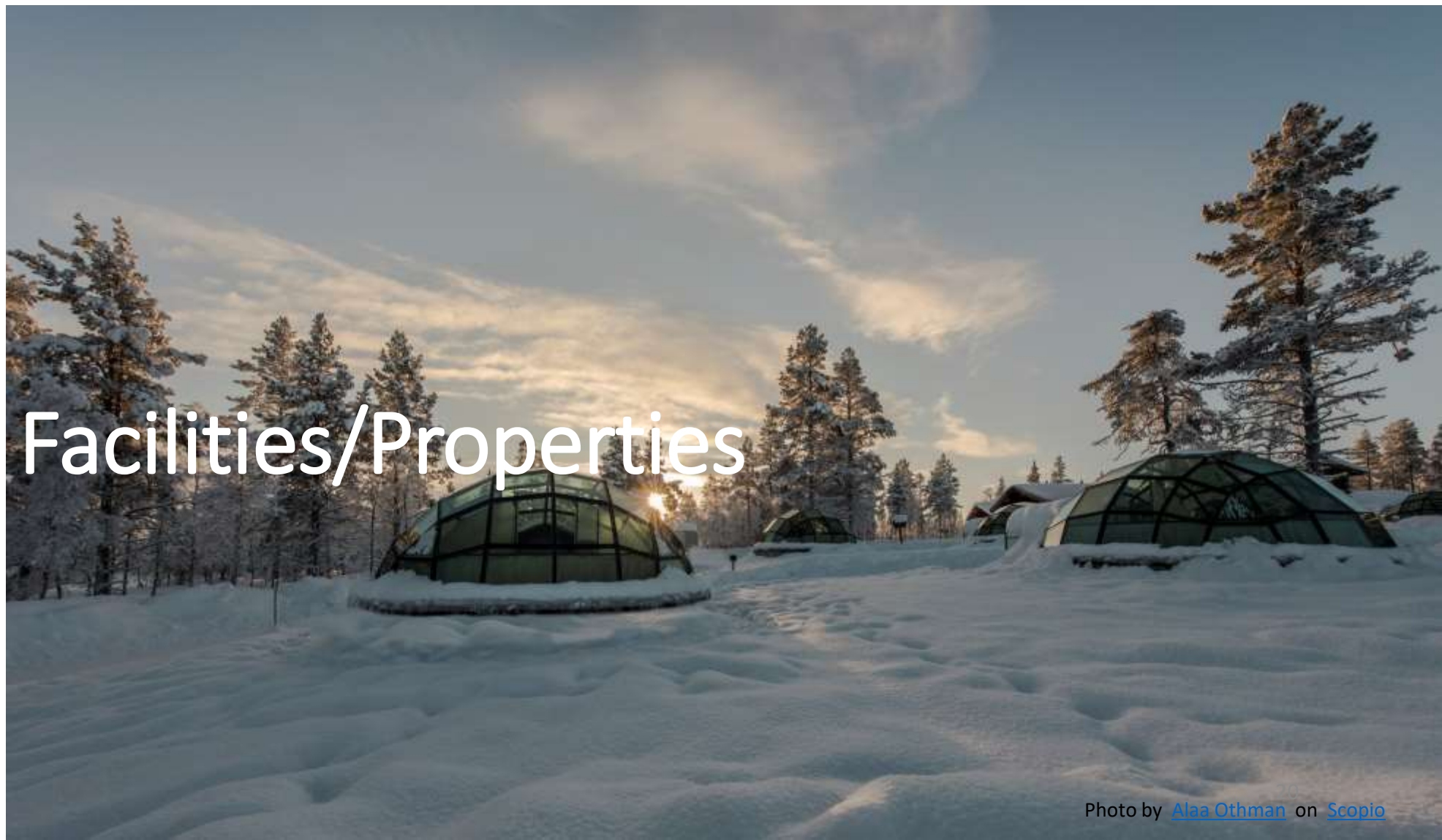
- #1 Guests looking for healthy options
- #2 Couples
- #3 Groups of friends



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



Trending Facilities/Properties





Wellness Facilities/Properties with Growth Potential

In every study we asked respondents to rate which wellness facility types may represent the highest growth potential. Such information can help developers as well as operators in their future plans. Here we present the global as well as the regional forecasts.

Industry Opinion

- #1 Resort Spas
- #2 Lifestyle-oriented resorts/spas
- #3 Eco spas/wellness resorts

Academia Opinion

- #1 Resort Spas
- #2 Medical spas/hotels/resorts
- #3 Eco spas/wellness resorts

The role of lifestyle-oriented resorts and spas has been showing constant growth ever since 2012, when we started to do our forecasts. The importance of an eco-orientation in spas and resorts appears to be equally important.

Medical treatments and services are usually indirectly related to wellness, however, the respondents suggest that the merging of wellness and medical treatments seems to be evident.

The lowest growth potential is associated with cruise ship spas, hotel spas, day spas and thalasso centers.

	Industry #1s	Academia #1s
• Northern Europe:	Day spas	Day spas & workplace wellness
• Western Europe:	Medical spas/resorts	Day spas & Medical spas/resorts
• Southern Europe:	Thalasso spas/resorts	Thalasso spas/resorts
• Central/Eastern Europe:	Hot spring/thermal spas/resorts	Hot spring/thermal spas/resorts
• North America:	Lifestyle-oriented resorts/spas	Day spas/Healthy living & co-working complexes
• Central America:	Destination spas	Destination spas
• South America:	Adventure spas/wellness centers	Adventure and eco spas/wellness centers
• Middle-East:	Resort spas & Medical spas/hotels	Thalasso spas/resorts
• South-East Asia:	Resort spas	Medical clinics
• Far East:	Hot spring/thermal spas/resorts	Hot spring/thermal spas/resorts
• Australia/New Zealand:	Adventure spas/wellness centers	Day spas
• Africa:	Adventure and eco spas/wellness centers	Adventure and eco spas/wellness centers



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



Trending Treatments





Wellness Treatments with Growth Potential

Wellness can be provided, experienced and delivered in many different forms. Respondents were asked to indicate which treatments & services may represent significant growth potential (besides massages, of course).

Industry Opinion

- #1 Spiritual practices
- #2 Natural resources based therapies
- #3 Nutrition & Detox programmes

Academia Opinion

- #1 Sport & Fitness
- #2 Medical wellness
- #3 Nutrition & Detox programmes

The region-based analysis confirms that we have to be careful when a certain treatment, service or programme is labelled as a ,global trend’.

Overall averages often hide the regional differences which are essentially important both for domestic as well as international wellness travel management and development.

Industry representatives forecast that spiritual, nature-based and detox programmes bring high growth potential. Academic researchers note that the opportunities sports, fitness, as well as medical wellness and detox programmes represent.

The lowest growth potential is associated with cruises, alternative therapies, fusion treatments and New Age-style programmes.

	Industry #1s	Academia #1s
• Northern Europe:	Rituals	Rituals & Psychological therapies
• Western Europe:	Natural resources based therapies	Medical wellness & Nutrition/detox programs
• Southern Europe:	Spiritual practices	Massages & Therapeutic recreation
• Central/Eastern Europe:	Natural resources based therapies	Medical wellness & Natural resources based therapies
• North America:	Psychological therapies	Nutrition & detox programmes
• Central America:	Massages	Spiritual & wellness festivals
• South America:	Medical wellness & Psychological therapies	Traditional healing approaches
• Middle-East:	Rituals & Traditional therapies	Yoga & meditation
• South-East Asia:	Natural medicine & Spiritual services	Fusion treatments
• Far East:	New Age programmes	Beauty treatments
• Australia/New Zealand:	Sport & Fitness	Sport & Fitness
• Africa:	Alternative therapies	Traditional healing approaches



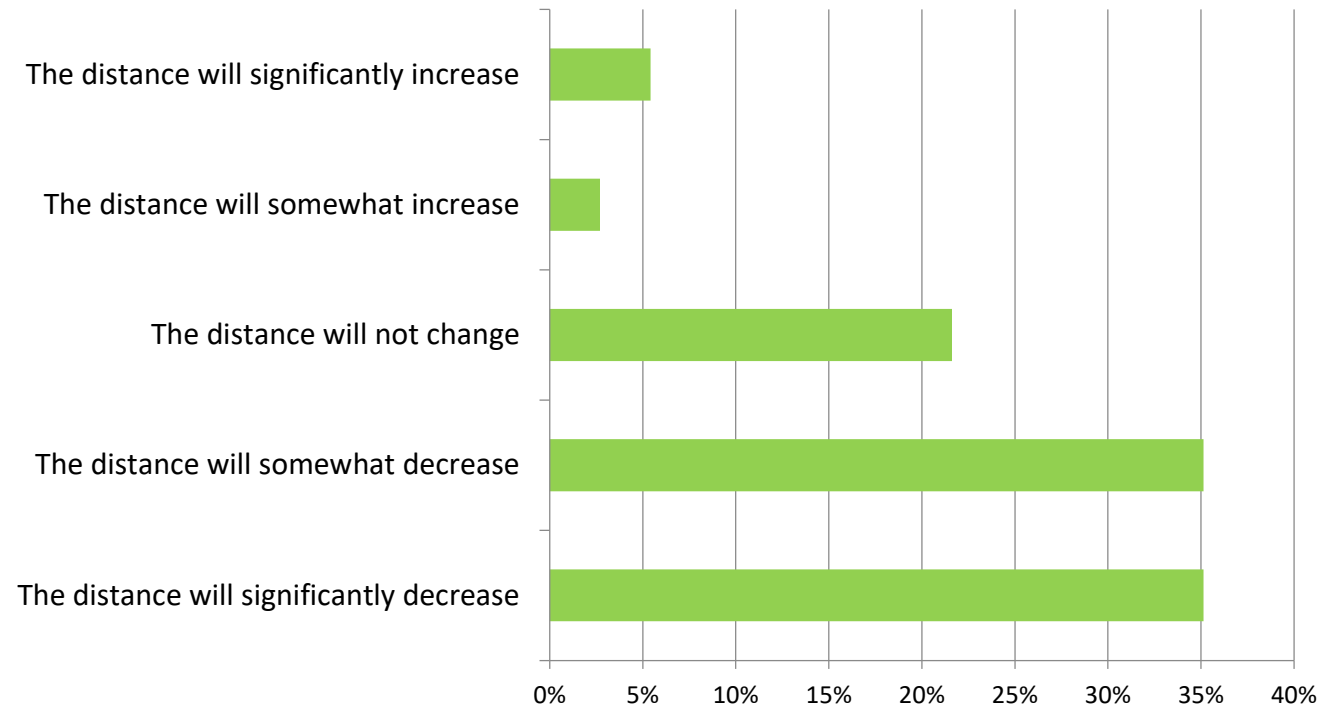
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Future of Medical Travel

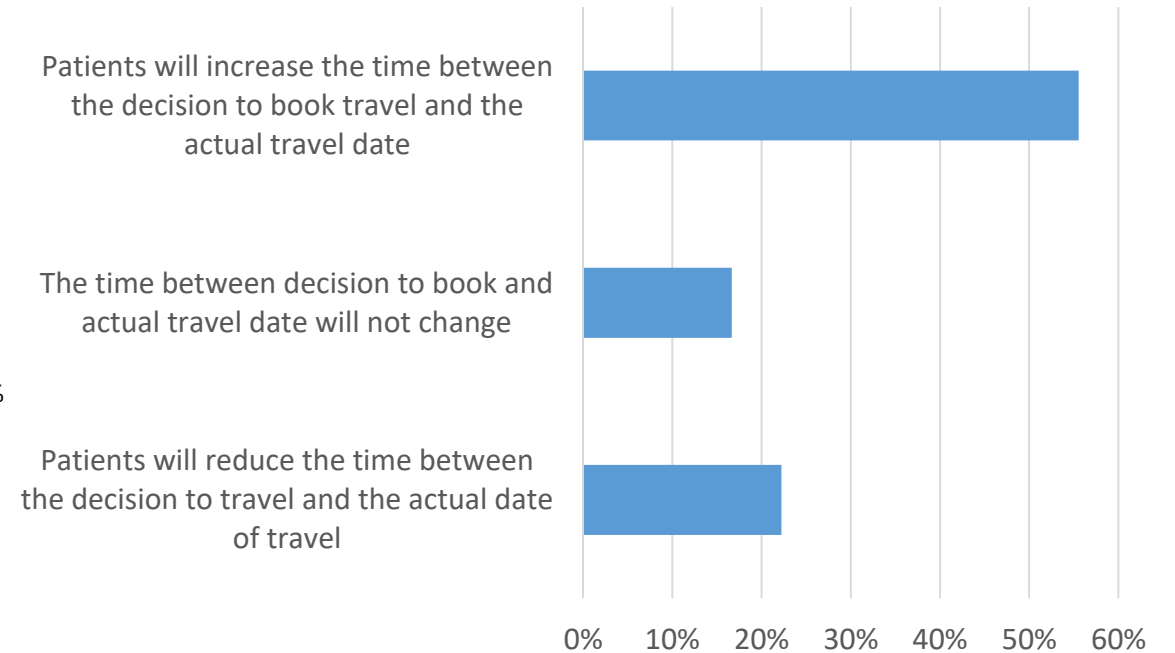


Impact of COVID19 on Medical Travel



Interestingly, and contrary to what the wellness travel survey results suggest the medical travel research suggests that it is more likely that medical travellers may **increase** the time between the decision to book and the actual date of travel.

At the same time the distance they would travel for is estimated to decrease significantly.





Impact of COVID19 on Medical Travel

Medical travel is not independent from leisure travel, and the factors influencing leisure travel. Certain elective procedures, e.g. travelling for plastic surgery or dental services may even compete with leisure travel directly.

According to the findings it seems that established brands and reputable providers can return to the market first. Travellers and/or patients seemingly will prefer these providers over less established ones.

It is to be noted that how certain countries have managed the COVID19 pandemic can have a direct impact on how attractive those countries will be for medical tourists!



Country Overviews

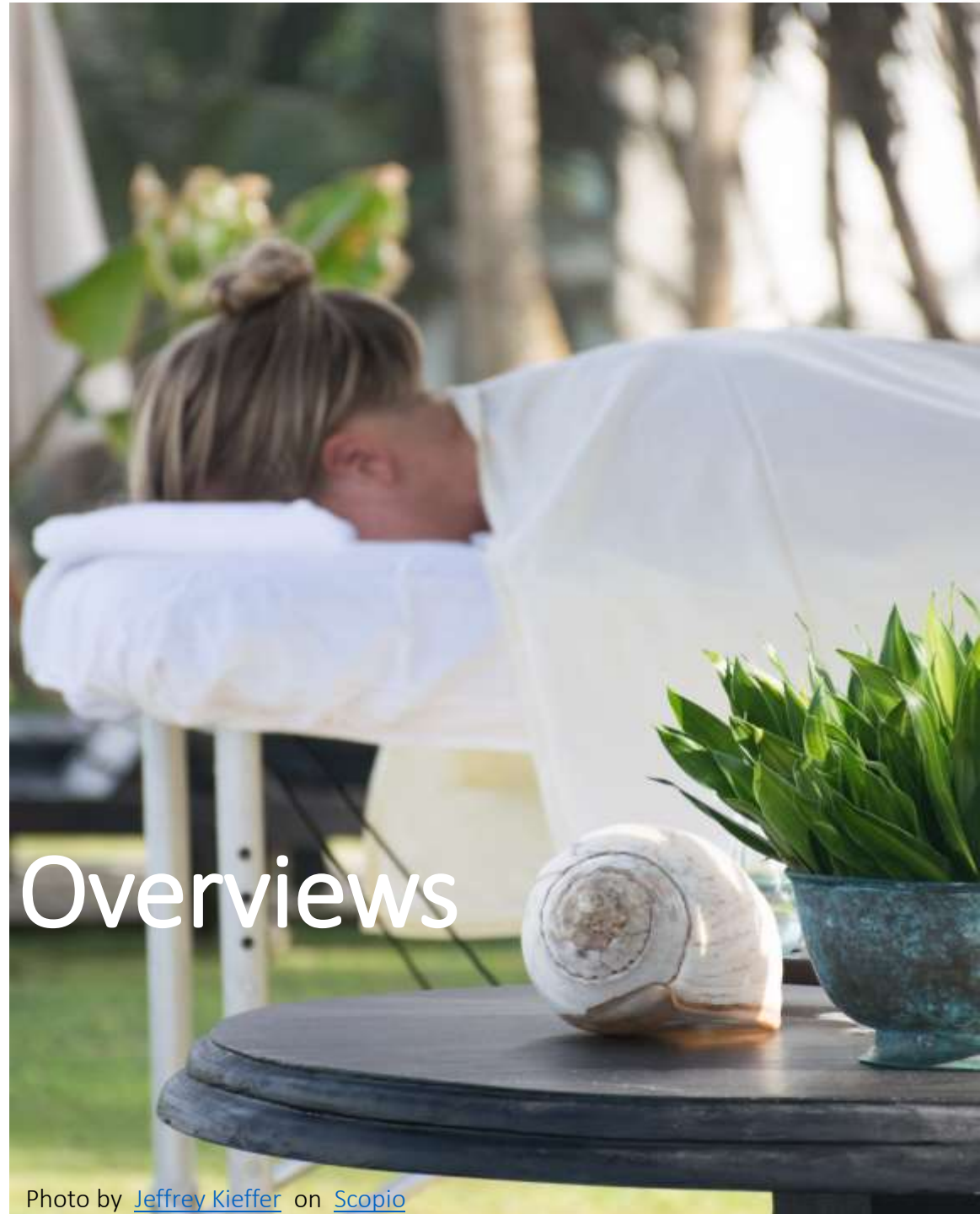
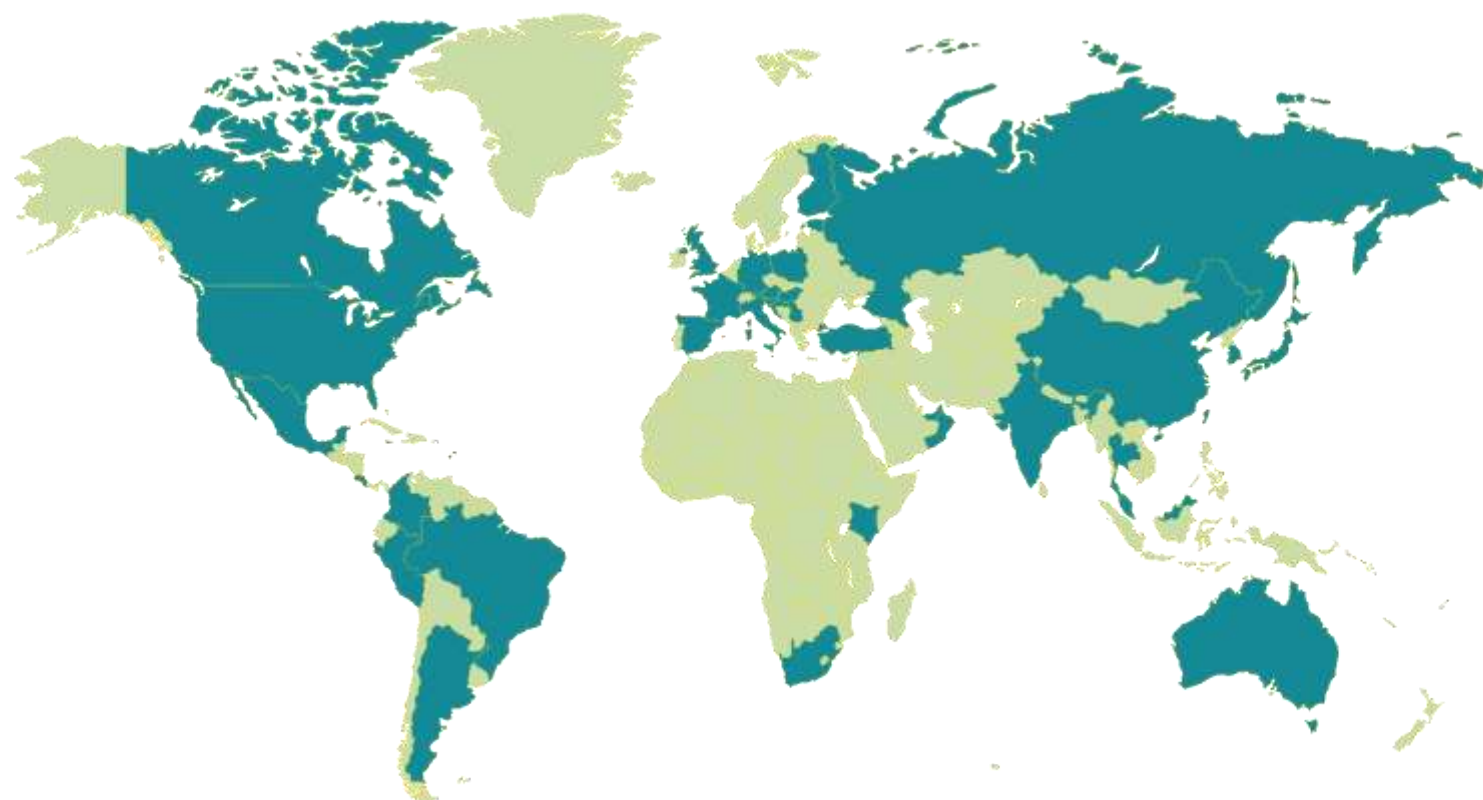


Photo by [Jeffrey Kieffer](#) on [Scopio](#)



Wellness Travel in 39 Countries & Regions



For the first time ever we invited 41 leading experts and industry representatives from 39 countries & regions to help us translating the global and regional forecasts.

It was very much anticipated that the global and regional forecasts needed to be further explored, reviewed and adapted. This is what we did together with great colleagues.

We provide a short summary of the current status of wellness and travel in every country, followed by the forecast about triggers, segments, facility types and treatments that represent growth potential.

Note that the columns represent order of priority and there is not necessarily a direct relationship between the items in the same row.

Hereby we thank every expert for his/her commitment and time creating this overview!

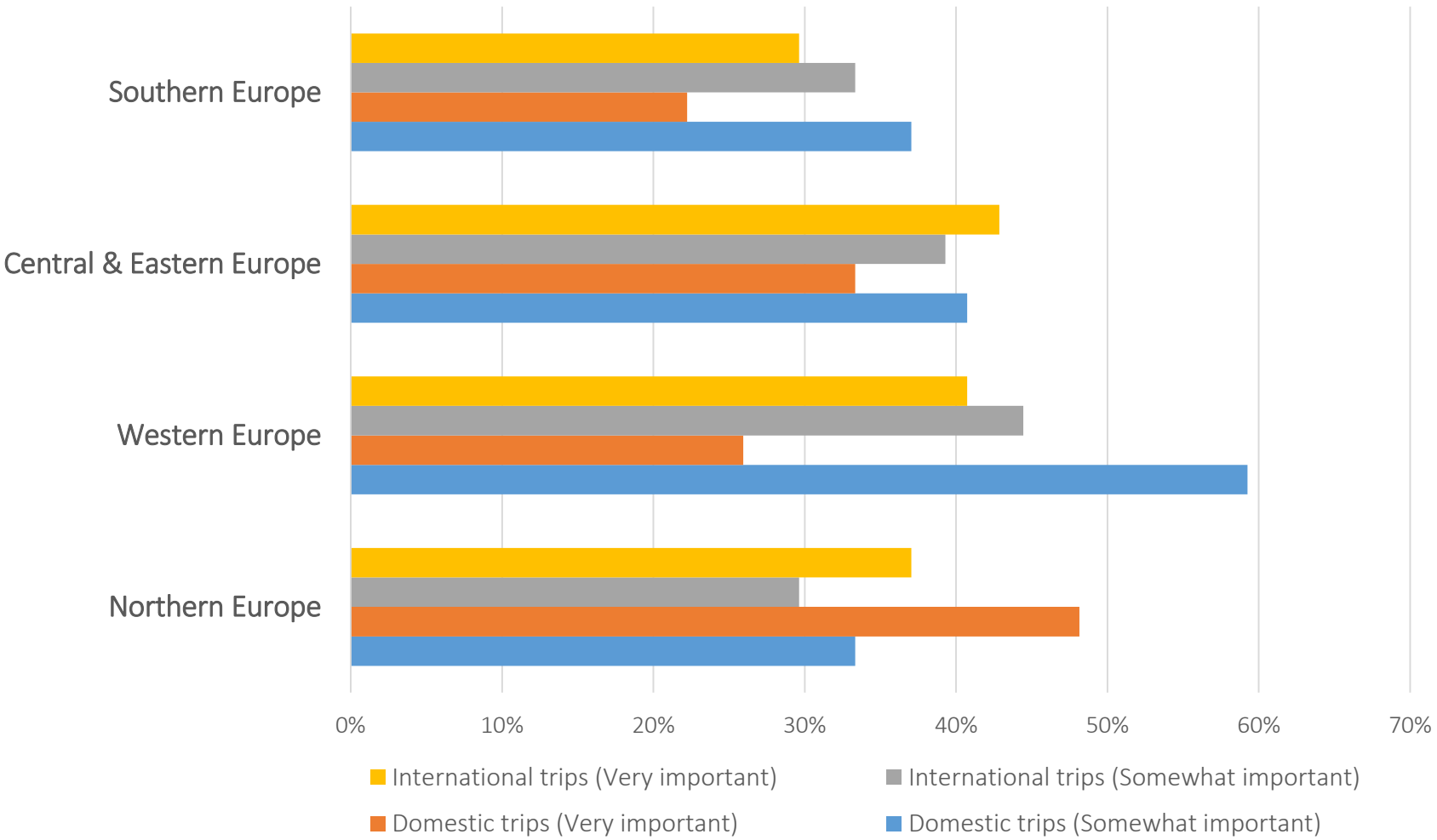


Europe





Role of Wellness Travel – Europe



Looking at the sub-regional data of the global research we can see that Western European countries are considered to be the ones where domestic wellness travel can play an important role. Most Western European countries have excellent wellness assets as far as hotel spas and wellness-infused hotels go.

Somewhat surprisingly Northern Europe also seems to be strong in domestic wellness trips, which is not independent from the latest property developments in the region with wellness in mind, e.g. in Norway or Iceland.

Southern Europe has traditionally not been a strong player in wellness travel. There are, however, a couple of new magnet developments in Spain, Italy, Greece or Turkey.

In Central and Eastern Europe hot springs have been extensively used for wellness as well as for medical purposes, and a growing number of international travellers are discovering these resources and facilities.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study

Northern Europe



Photo by [Haley Ivers](#) on [Scopio](#)



Growth Opportunities – Northern Europe

The regional forecast suggests a somewhat unexpected trend in terms of market segments interested in wellness travel.

It seems that the market brings a wide variety of development options from day spas to specialised facilities such as destination spas and eco-spas.

In terms of services and treatments we can see the strong demand for more complex approaches that can potentially be relatively closely linked to healthcare services, too.

Segments
Solo women
Couples
Groups of friends
Guests looking for healthy services

Facilities/Properties
Day spa
Destination spa
Workplace/corporate wellness trips
Eco-spas & wellness facilities

Services/Treatments
Rituals
Psychological therapies
Therapeutic recreation
Medical wellness & rehabilitation



Estonia is known for its nature enthusiasm and its curative mud and mineral water used for treatments. In the last few years there is a growing demand for day spas and also for more complex lifestyle-related services and packages. This includes not only personalised wellness programming but also combinations of business events and wellness services. Estonians are very much looking for wellness programmes for entire families where the whole family including kids can have treatments, activities or training programmes.

Triggers

Relaxation

Fitness

Self-healing

Segments

Solo women

Couples

Guests looking for healthy services

Facilities/Properties

Day spa

Wellnes (spa) hotels

Rural / eco spa

Services/Treatments

Pampering & Innovative beauty services

Therapies based on natural resources

Healing programmes

Finland

With Raija Komppula



Finland is the home of thousands of lakes and an abundance of forests. No surprise that forest bathing has grown to be an important offer, especially to foreigners. There is some lake and nature culture inspired specialist programming such as 'lake wellness'. The Finnish National Tourist office has been branding Finland as the country where guests can enjoy the 'silence'. And we should not forget that Finland is the home for the authentic sauna experience!

Triggers

Rest, Relaxation & Improving quality of life

Belonging

Curiosity

Segments

Couples & Family

Groups of friends

Solo women

Facilities/Properties

Spa hotels and spa resorts

Holiday/leisure resorts

Luxury spas

Rehabilitation centres

Services/Treatments

Pools & wet areas

Massages & body treatments

Outdoor activities

Western Europe

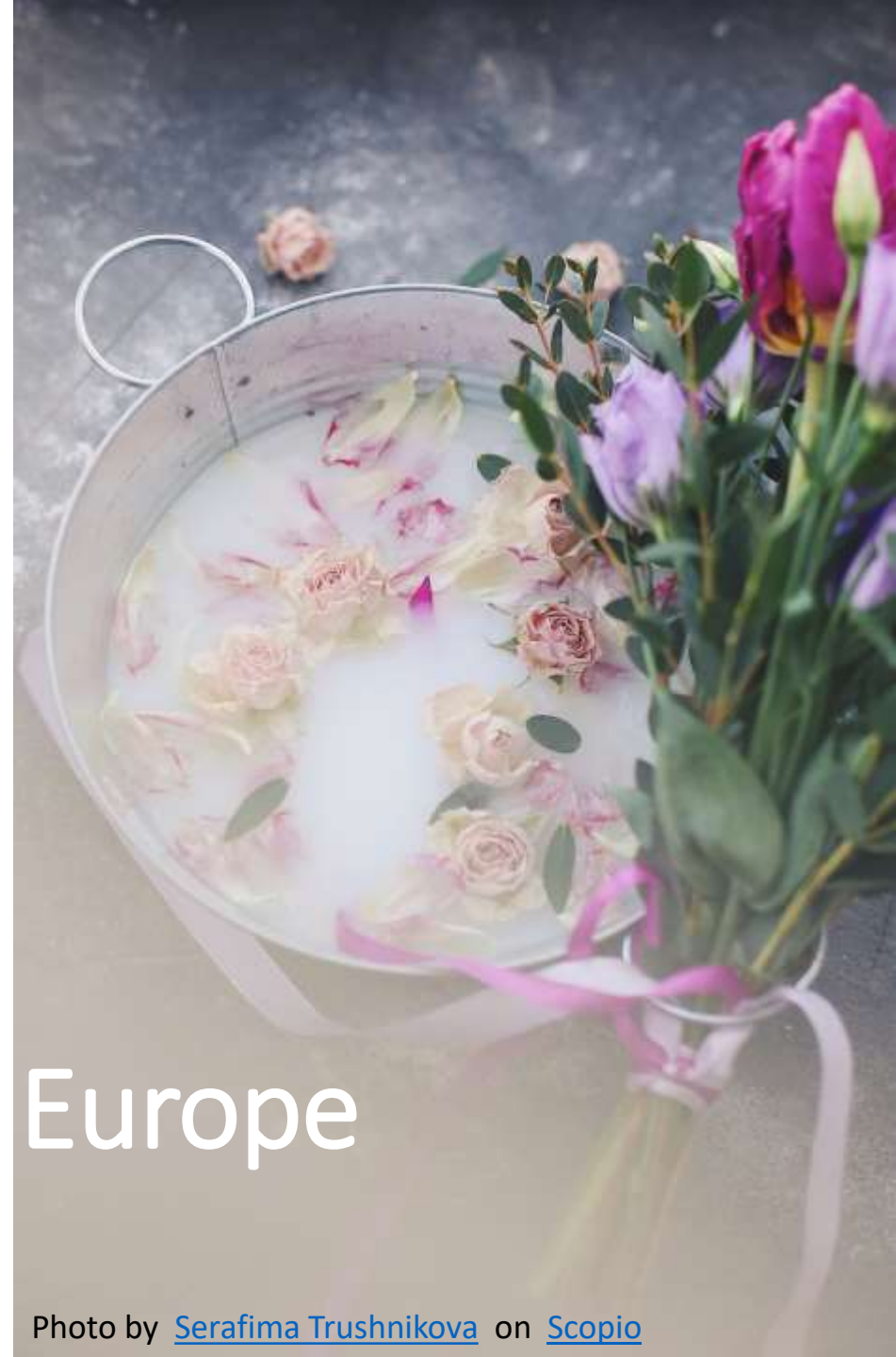


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Growth Opportunities – Western Europe

Segments	Facilities/Properties	Services/Treatments
Couples	Medical spa and hotel/resort/centre	Therapies based on natural resources
Guests looking for healthy services	Clinic	Psychological therapies
Solo women	Wellness and spa hotel/resort/centre	Medical wellness & rehabilitation
Same sex couples	Workplace wellness trips	Nutritional and detox programmes

Western European countries have it all, i.e. amazing wellness and spa facilities, creative concepts, established brands.

This is what makes the country-based analysis very interesting: every country has its own strengths as well as development directions!

Medical services gain more and more interest in the wellness world and that has an impact both on the treatments as well as on the development opportunities in wellness and hospitality real estate.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



The relationship between wellness and travel has always been an important motivation for domestic travel in Austria. The country has amazing wellness assets such as wellness-themed hotels, thermal complexes or specialist wellness retreats and health spas serving both the local as well as international market. Systematic wellness programming is a strong suit in Austria since it is the home of one of the leading health spa concepts, i.e. LANS Med and has been playing a leading role in the definition of the Alpine Wellness concept.

Triggers

Pampering / rewarding self

De-stress

Recharge

Segments

Couples

Solo women

Guests looking for healthy options

Facilities/Properties

Wellness hotels

Hotels with spas

Thermal complexes

Services/Treatments

Therapies based on natural resources (Thermentourismus)

Medical wellness & rehabilitation

Nutritional and detox programmes (esp. FX.Mayr Therapies)



France has a strong wellness heritage, e.g. thalasso and hot spring resources and resorts, high-end spas, hotels and wellness facilities as well as several leading beauty, body and skin care brands. The rediscovery of natural resources puts France in a very advantaged position in wellness, especially in terms of specialist developments, e.g. incorporation of fragrances with wellness offers, development of thalasso therapy-based hospitality or the nature orientation of skincare brands.

Triggers

Recharge

De-stress

Rewarding

Segments

Urban dwellers between 30-60

Couples

Generation x & Millennials

Facilities/Properties

Thalasso centres/resorts

Hotel with spa

Resorts

Services/Treatments

Massages

Treatments based on natural resources

Detox & leisure combo (e.g. with yoga)

Germany

With Michael Altewischer
& Wilfried Dreckman



Wellness
Hotels & Resorts



Germany has amazing resources and facilities focusing on wellness, or more appropriately Wohlfühlen or Wohlbefinden, as it is said in German. Amazing thermal baths, wellness hotels and resorts, specialist retreats, etc. Health-focused destinations, i.e. cities attract not only domestic but foreign tourists, too. Germans are one of the world's leading consumers of wellness travel. Many wellness innovations originate from Germany, i.e. the ‚aufguss‘ sauna rituals, combination of music and relaxation. Guests can find themed wellness offers in Bavaria or in Baden-Württemberg and Germany is the home of Baden-Baden, the original destination for health tourists from all around the world.

Triggers

Pampering

Recharge

De-stress

Segments

Couples

Families with kids

Solo women & men

Facilities/Properties

Nature

Wellness hotels & resorts (in natural setting)

Thermal/hot spring facilities

Services/Treatments

Immune boosting treatments

Therapies based on natural resources

Nutritional & detox programmes



It is anticipated that in the United Kingdom the instant gratification from treatments and services such as massage will see a boom in the short term at least. Watch for a shift in focus from feeling better to getting better at feeling, i.e. connection with self, aligned values, congruence in how one lives ones life - working, leading, living, loving. Although the expectation is that wellness travel will continue to rise more than for all and any travel, the baseline expectation for services and facilities that improve wellbeing is moving upwards. Options in nature, healthy food choices and a culture that instinctively delivers with holistic, whole person wellbeing at its core is developing through leadership and recognition of consumer shift - conscious and sub conscious.

Triggers	Segments	Facilities/Properties	Services/Treatments
Mental/emotional health - getting better at feeling	Solo travellers	Venues in nature - outdoor space	Nature based exercise
Re-setting - breaking poor habit patterns	Couples	Integrated facilities - sports, spa, gym	Mental and emotional health - group communities and therapy
Finding connection - spirituality, inner work	Families	Anything spa	Personal growth and development



Central & Eastern Europe





Growth Opportunities – Central & Eastern Europe

Segments
Guests looking for healthy services
Couples
Families with children
Solo women & men

Facilities/Properties
Mineral/hot springs spa/bath
Hotel spa (urban location)
Medical spa and hotel/resort/centre
Wellness and spa hotel/resort/centre

Services/Treatments
Therapies based on natural resources
Rehabilitation (both physical & addiction related)
Medical wellness
Rituals

Many countries in Central & Eastern Europe have been famous for their natural hot springs. Historically in intra-regional travel was dominated by such destinations where tourists were looking for evidence-based medical treatments, e.g. balneotherapy. Lately, a more contemporary understanding of wellness has gained momentum and there is a rapid growth of spas and wellness hotels. The anticipated growth opportunities support the recent development directions.



There is a rather diverse supply of wellness as well as medical spa services in Croatia. Tourists can find such destinations both in inland as well as by the coastal regions. The services inland are typically provided in health resorts, i.e. special hospitals offering treatments based on natural healing resources and hot springs. In the coastal zone thalasso spas and resorts are in abundant supply. Such provision include services based on the sea, the coastal microclimate, sea salt and algae, which in Croatia is often accompanied with local healing herbs. This part of Croatia is known for its top hotels with excellent wellness and spa offers incorporating local resources.

Triggers

Relaxation

Recharge

De-stress

Segments

Guests looking for healthy options

Couples

Families with children

Facilities/Properties

Hotels with spas

Hot spring thermal spas / resorts (Special hospitals for medical rehabilitation)

Thalasso spas / resorts

Services/Treatments

Natural resourced based therapies

Therapeutic recreation

Traditional healing approaches



Revitalising thermal waters form the basis of the spa supply and health tourism in Hungary. Based on the bathing traditions of thousands of years, in conjunction with modern medical research, healing water-based treatments have become a real asset. Hot spring baths with healing waters are approved and certified by the government legislation. In the last 15+ years numerous wellness hotels were opened most of which capitalise on the rich hot spring resources. More holistic offers have been introduced to the market in the last few years and there are examples to merging healthcare and wellness under the medical wellness concept.

Triggers

Healing

Rejuvenation

Recharge & relaxation

Segments

Senior and middle-aged couples

Families with children

Guest looking for health services

Facilities/Properties

Health spa & spa hotel

Wellness hotel & resort

Thermal/hot spring spas

Services/Treatments

Rehabilitation based on natural healing resources

Family wellness & recreation

Therapies based on natural healing resources

Poland

With Arek Dawidowski



Poland has a large number of traditional healing and rehabilitation facilities and destinations. Hot springs, climatic and healing resorts have been dominating the market aiming at rehabilitation and recuperation. The latest developments indicate a shift both in demand and supply. A wider understanding of health, and consequently wellness has resulted in the development of wellness hotels or family-oriented facilities. The Polish are happy to book spa and/or other wellness offers during their international trips too.

Triggers

De-stress

Recharge

Prevention

Segments

Guests looking for healthy services

Couples

Families with children

Facilities/Properties

Mineral/hot springs spa/bath

Wellness and spa hotel/resort/centre

Medical spa and hotel/resort/centre

Services/Treatments

Therapies based on natural resource

Prevention-oriented services & treatments

Rehabilitation (both physical & addiction related)



Russia has historically strong assets in medically driven wellness, often capitalising on natural hot springs and climatic resources, i.e. rehabilitation centres (or sanatoria). Russian travellers have been visiting the leading health and wellness oriented facilities, clinics and hotels not only in Europe, but also in Asia and in the Middle East. Wellness tourism is currently experiencing serious transformation by turning to new domestic resorts and destinations. Recently many sanatoria, i.e. rehabilitation centres have entered the wellness/spa market by introducing spa treatments to their menus!

Triggers

Prevention & healing

Rehabilitation

Relaxation

Segments

Couples

Families with children

Facilities/Properties

Medical spa hotels

Wellness hotels

Natural resources-based
rehabilitation centres
(sanatoria)

Services/Treatments

Physiotherapy

Detox programmes & Genetic
testing

Sleep therapies



After two centuries of development of balneology, i.e. healing hot spring-based treatments, it appears to be difficult to change the tradition and to make the spas attractive for other activities and segments than for health or healing. Although the importance of prevention remains difficult to make widely accepted, it is increasingly present among spa visitors. Given the impacts of the global pandemic on mental health, the Serbian Spas Association keeps promoting the beneficial impacts of hot spring bathing on mental health. There are new and innovative developments also taking place such as the introduction of the 'forest hammam' concept or detox programmes.

Triggers

Self-healing

Rejuvenation

Relaxation

Segments

Guests looking for healthy options

Couples

Groups of Friends

Facilities/Properties

Hot spring/thermal spas/resorts

Medical spas/resorts

Resort spas & Medical spas/hotels

Services/Treatments

Natural resources based therapies

Medical wellness & Nutrition/detox programs

Massages & Therapeutic recreation



The main motive for visitors/guests for visiting Slovenian thermal spa resorts is the natural remedies such as thermal and mineral waters, Adriatic climate, sea brine and sea mud. The very rich wellness offer at the spas targets all ages and most segments (e.g. couples, families with children, senior, friends, both female and male, etc.) The pristine nature surrounding the spas, away from busy cities, enables guests to enjoy as well as to explore nature. For all those reasons, the Slovenian spas are considered to be the leading tourism assets in Slovenia.

Triggers

Pampering & Relax

De-stress & Re-charge

Selfness

Segments

Couples

Family with children

Solo women

Facilities/Properties

Spa hotels

Thermal complexes (with large waterparks, pools, etc.)

Wellness hotels

Services/Treatments

Massages, saunas

Medical wellness/Detox programmes

Natural resources-based treatments (bathing in thermo-mineral waters, drinking cure, thallassotherapy)

Southern Europe



Photo by [Silvia Valsecchi](#) on [Scopio](#)



Growth Opportunities – Southern Europe

Although Southern Europe is considered to be one geographical region we can map differences not only country-by-country but also within the countries.

It seems that the spiritual, the holistic as well as the integrative practices have been gaining momentum in the last couple of years with the opening of grand properties from the Canary Islands to Turkey.

The market data show that the proliferation of wellness services and practices is expected to continue.

Segments
Couples
Solo women
Guests looking for healthy services
Families with children

Facilities/Properties
Thalasso hotel/spa/centre
Resort spa
Wellness and spa hotel/resort/centre
Family spas & wellness facilities

Services/Treatments
Spiritual practices
Complementary natural medicine
Sports & fitness
Therapeutic recreation



Wellness travel did not play an important role in Greece so far. The domestic demand still is moderate. There has been a strong thalasso-based supply, especially on the islands. The natural hot springs, however, have not really been used lately. There are thalasso-resorts offering services and treatments based on the sea. With the new openings of high-end resorts with strong spa and other wellness offerings and holistic retreats, wellness travel seems to be gaining momentum in Greece.

Triggers

Relaxation

Pampering

De-stress

Segments

Families with children

Couples & Teenagers

Groups of women

Facilities/Properties

Resort Spas

Thalasso Spas

Thermal/hot springs spa/bath

Services/Treatments

Therapeutic Recreation

Therapies based on natural resources

Sport & Fitness



Italy ranks as the 6th-largest spa market in the world with a tradition of body and soul treatments that dates back thousands of years to ancient Rome. The strength of Italy is the diversification of the country. Numerous areas represent strong identities, each with specific cultural and climatic characteristics. This allows for an infinite number of food and herbal products that are the basis of unique healing nourishment, drinks and cosmetic products. There are established facilities, brands and destinations focusing on hot spring resources, resort medicine and high-end hotels with spas.

Triggers

Combination with cultural travel

Wellness plus agrifood experience

Natural environment and cosy lifestyle

Segments

Couples + DINK

Elderly persons

Families

Facilities/Properties

Wellness Destination resorts

Thermal complexes

Leisure & wellness complexes

Services/Treatments

Food and drink based treatments

Thermal water treatments

Local & regional treatment and cosmetics

Spain

With Cesar Tejedor



Spain has not been a stronghold in international wellness travel in the past. Hot spring-based medical facilities used to dominate the domestic market. The latest developments on the mainland, in the Canary Islands, and even in Ibiza, however have changed the landscape of wellness. Retreats, yoga camps, destination spas, hotel spas, lifestyle resorts have started to shape the wellness offering in Spain with a few landmark developments already in place. The market is expected to mature quickly which requires the development of facilities, personnel and travel agents specialised in wellness.

Triggers

Relaxation & Re-charge

Pampering

Self-healing

Segments

Couples

Group of friends

Solo travellers

Facilities/Properties

Branded resort spas

Hotels with spas

Hot spring resorts

Services/Treatments

Massages & Facials

New Rituals & Programming

Holistic therapies



Thanks to the natural resources of its ecosystem and climatology, the Canary Islands offer a wide range of therapies and activities aimed at physical, emotional and psychological well-being. Tenerife is a very good option for mindfulness, forest bathing, emotional detox or yoga retreats. The island also allows visitors to combine a holiday enjoying its tourist delights with the opportunity to receive elective medical or surgical treatments (e.g. cosmetic, dental, fertility, dialysis). The Tenerife Health Destination initiative has been created to support and to market wellness and elective medical services of Tenerife.

Triggers

De-stress

Emotional Healing

Pampering

Self-image

Segments

Families with children

Solo (men or women)

Guests looking for healthy options

Guests looking for elective medical services

Facilities/Properties

Healthy Hotels & Spas

Clinics offering elective medical treatments

Physiotherapy & rehabilitation centres

Thalassotherapy

Services/Treatments

Traditional & Alternative therapies

Fasting & Detox

Medical wellness

Rehabilitation



Ibiza is a natural paradise for wellness tourism. It has been a destination for holistic tourism for decades. Local and international trainers from all over world come to the island world offering yoga retreats, self development, detox or health holidays. The retreats pay special focus to sustainability. Ibiza has a special magnetic power and energy that attracts visitors. Along with holistic offers Ibiza is a sports destination as well attracting athletes for training and competitions such as marathon or triathlon. Ibiza has several amazing spas both in luxury hotels with international and personalized wellness treatments and programs as well as in small wellness hotels in lovely natural environment. The medical tourism is at the moment limited to a couple of specialized high-end aesthetic clinics and to a prestigious private hospital.

Triggers

Recharge

Detox

De-stress / relaxation

Yoga & Sports practice

Segments

Solo travellers

Friends (couples & groups)

Couples

Guests looking for relaxation
& energy boost

Facilities/Properties

Hotel spas

Agrotourism (boutique hotels
& wellness services)

Aesthetic Medicine Clinics

Private Hospital

Services/Treatments

Massages (therapeutic and
holistic)

Alternative Therapies &
Activities

Yoga / Fitness / Dance

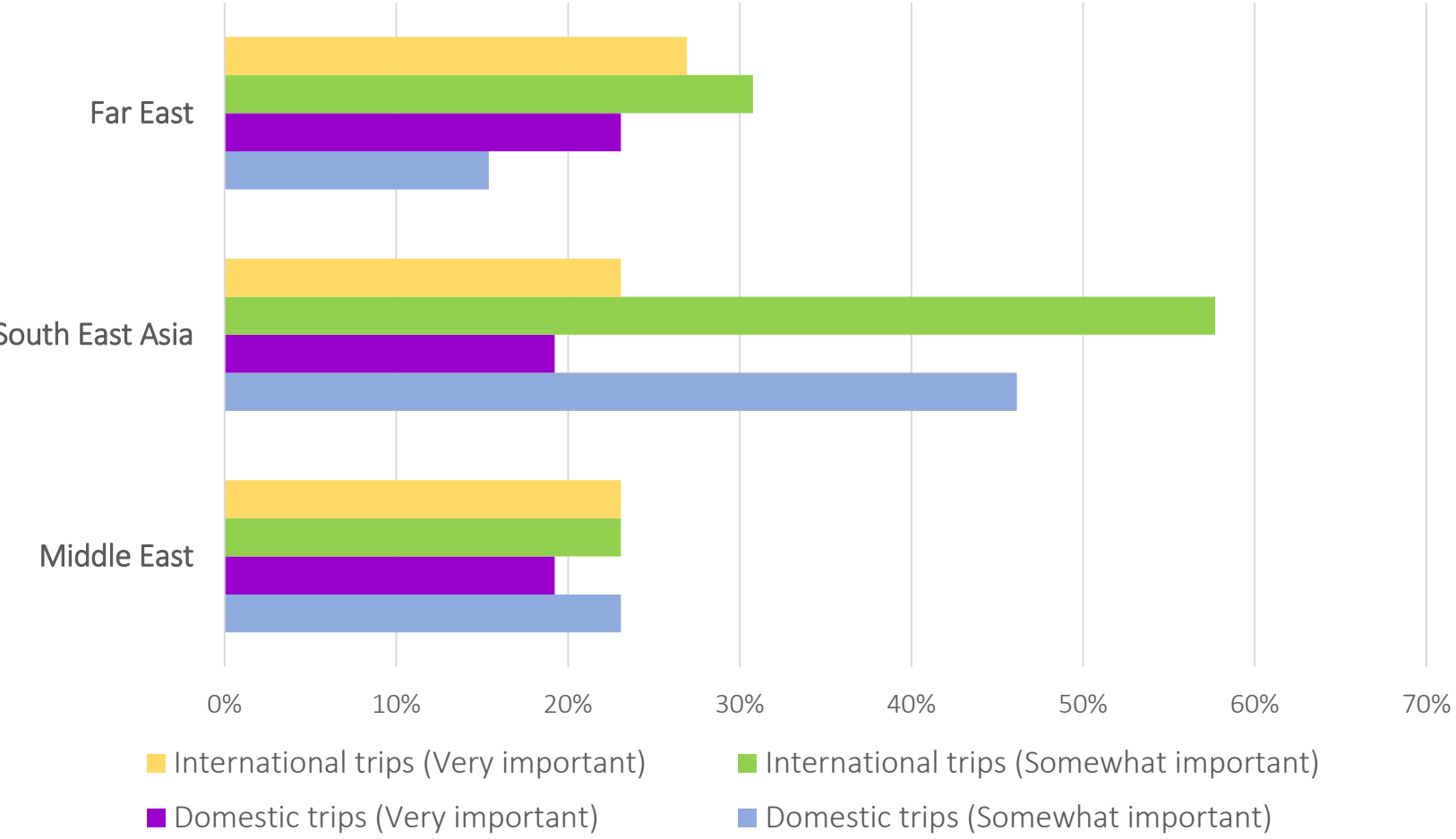
Special diets and Detox
Programmes



Asia & Middle East



Role of Wellness Travel – Asia & Middle East



The relationship between wellness and travel in Asia and in the Middle East has been evolving.

So far the region attracted and received guests from afar. In the last few years, however, intra-regional as well as domestic travel for wellness purposes has been growing.

It is anticipated that South-East Asia remains the most popular area for wellness within the continent.

The Middle East is expected to gain momentum in the next couple of years, at least in terms on intra-regional as well as domestic travel.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



Far East



Growth Opportunities – Far East

Segments
Guests looking for healthy options
Couples
Groups of friends

Facilities/Properties
Mineral/hot springs spa/bath
Holistic retreat
Workplace wellness trips
Wellness real estate

Services/Treatments
New Age
Therapies based on natural resources & Traditional healing approaches
Beauty treatments
Non-invasive plastic surgery

The Far East has not yet been a strong player in the international wellness travel market. This does not mean, however, that the Far East countries lack wellness resources.

Our data shows that there is growing interest in anything that may have better health-contributing qualities. This is very good news for the wellness tourism providers.

Hot springs have traditionally been important elements of the supply. Spirituality has been part of the lifestyle for centuries.

Currently, spiritual practices have been influencing wellness services and programming.





Wellness in its 'contemporary' form may not be fundamentally new to the Chinese market. Traditional Chinese Medicine (TCM) practices have been part of life for hundreds of years not only as healing but also as part of prevention and healthy living. TCM has found its way to wellness tourism development as well. Hot springs are enjoying a rediscovery in China, and large capacity facilities are currently being built. The market is enhanced with high-end spa resorts and hotel spas.

Triggers	Segments	Facilities/Properties	Services/Treatments
Learning & (Re)Discovering Heritage	Families with Children	Wellness complexes (health farms or health forests)	Study & learning activities
Self-healing	Groups of Families	TCM Complexes (forests, parks, farms, health towns)	TCM-based services (healthy food, lectures, check-up, training programmes)
De-stress & Relaxation	Groups of Senior Citizens	Hot springs	Recreational & Health Status Improving packages



Hong Kong has its special characteristics that may make it differ from the trends relevant in other parts of China. Although C-beauty, i.e. 'Chinese beauty' is a national phenomenon, Hong Kong has been playing an important role in beauty and skincare. The hotels and day spas have been established elements of supply for quite some time with international hospitality and skincare brands. Recently the market shows strong interest in anything that can be done outside in nature. Also, the family-oriented wellness services have become very attractive and popular.

Triggers

Belonging

Appreciation of life

Segments

Families with kids

Children

Facilities/Properties

Family-oriented facilities

Natural locations

Services/Treatments

Natural therapy

Social wellness for kids



The relationship between wellness and travel has always been an important motivation for domestic travel in Japan. The country has amazing wellness assets and culture such as wellness hotels and resorts with spas, onsen-ryokans (Traditional Japanese-style inn with hot springs facilities), Shinrin-yoku (forest bathing), local healthy Japanese food and green tea, natural remedies, rich nature in all four seasons, and wellness spas serving both the local as well as international market. J-beauty, i.e. the Japanese-beauty regime is attracting wellness travellers from all around the Far East.

Triggers

Clean nature

Tradition (e.g. onsens)

Gourmet (with local healthy food)

Segments

Family

Couples

Friends

Facilities/Properties

Hotels with wellness facilities

Ryokans with onsen

Resort clubs/Rental resorts with spas

Services/Treatments

Onsen (hot springs)

Local healthy foods for nutrition or detox

Therapies based on natural resources

Key sources:

“Travel and Tourism Consumption Trend Survey (Official Report) 2020”, e-Stat (a portal site for Japanese Government Statistics)

“Trends of Japanese Travelers under the New Coronavirus Epidemic 2020 [Part 4: Travel Attitudes (Motivations, Changes in Travel Destinations and Behaviors, etc.)”, Japan Tourism Bureau Foundation

South Korea

With Ki Nam Jin



South Korea has been traditionally strong in hot spring bathing, and lately in beauty as drivers for wellness travel. Because of the strong work ethic, there has been little room to enjoy wellness. Lately, South Koreans started to travel abroad, including to Thailand and Indonesia for wellness tourism. Cultural traditions play important factor, i.e. it is a symbol of social status to go abroad for relaxation. There is a new trend of pursuing eudaimonic value from travel in recent years, a shift from hedonic value motivations. The central government is currently providing business support for the development of the wellness tourism industry of individual local governments. K-beauty, i.e. 'Korean-beauty' has made South Korea a must visit destination to many Chinese wellness travellers.

Triggers

De-stress & Recharge

Reward self

Self-healing & Development

Segments

Family

Couples

Group of friends

Facilities/Properties

Hot spring/thermal spas/resorts (e.g. Jimjilbang)

Wellness centres (for skincare, massage)

Medical clinic (for skincare, hair spa)

Services/Treatments

Traditional Korean Medicine

Beauty treatments

Natural resources-based treatments, e.g. forest

South East Asia





Growth Opportunities – South-East Asia

South-East Asia has a very complex supply in wellness tourism. From high-end hotels with spas at breathtaking locations to ashrams offering spiritual awakening many destinations and properties have become established market players.

It is interesting to see that along with a couple of other areas in South-East Asia the gap is closing between medical and wellness services.

Segments
Groups of friends
Solo women
Guests looking for healthy options
Couples

Facilities/Properties
Resort & hotel spas
Medical spa and hotel/resort/centre & Clinics
Holistic retreat
Wellness real estate

Services/Treatments
Complementary natural medicine
Spiritual practices (e.g. yoga)
Fusion treatments (e.g. Aquaveda)
Traditional healing approaches



India is a must visit destination to anyone who is interested in spirituality and holism. Ashrams or spiritual retreats offer specially packaged services and programmes. A couple of destination spas have gained international recognition and appreciation. For the more mainstream market, high-end hotels and resorts with spas offer wellness services. It seems that after the dominance of incoming spiritual tourism the Indian wellness tourism supply will enjoy significant growth in many areas of wellness, hospitality and travel.

Triggers

Segments

Facilities/Properties

Services/Treatments

Self-awareness /body-consciousness

Groups (family and/or friends)

Wellness resort & hotel spas

Therapies based on natural resources (e.g. Ayurveda)

Self-healing

Guests looking for healthy options

Medical spa & Traditional therapy centres/clinics

Medical wellness/pre-post-medical intervention rehabilitation

Connection at different levels

Couples

Wellness real estate

Yoga and spiritual wellness practices

Spiritual healing centres & Holistic retreats

Traditional Therapies

Malaysia

With Jeanette Tambakau



Malaysia has become one of the leading countries in medical tourism. In the last couple of years more and more attention is being paid to wellness and to wellness tourism. The country's rich natural resources, e.g. hot springs as well as the heritage assets of many cultures provide exciting opportunities for wellness tourism. There already are great hotels with spas. What is even more forward looking is the development of wellness cities.

Triggers

De-stress & Recharge

Relaxation &
Rejuvenation

Self-healing &
Development

Segments

Family with kids

Couples

Facilities/Properties

Hot springs

Destination spas

Day spas

Services/Treatments

Signature massages

Traditional treatments

Health-status specific
treatments



Thailand is already an established destination for international wellness travellers. The country offers lavish resorts with wellness centres and spas, health resorts as well as holistic retreats. The importance of wellness in tourism is highlighted by the decision of the authorities to create 'wellness quarantines' for guests. Medically defined complexes offering medical wellness-type treatments have been opened recently targeting the local market. The market expects to see services and facilities that can further the cooperation between sustainability and wellness.

Triggers

De-stress

Pampering

Desire to be with/in nature / anti-plastic

Segments

Couples

Eco warriors

Corporate

Facilities/Properties

Spa resorts

Destination spas & Health 2 Hospitality fusion complexes

Wellness hotels

Services/Treatments

Culturally associated treatments (i.e. Thai massage)

Detoxification anything

Yoga & meditation (relaxing/mindfulness)



The Middle East





Growth Opportunities – Middle East

Segments	Facilities/Properties	Services/Treatments
Guests looking for healthy options	Resort spa	Therapies based on natural resources & Traditional healing approaches
Couples	Medical spa/resort	Rituals
Friends together	Hotel spa	Spiritual practices
Solo men	Medical spas & health infused complexes	Fusion treatments

The Middle East is a relative newcomer in the international wellness travel market. Dubai and lately Abu-Dhabi have become established names in the medical tourism market.

Current developments in Dubai and other emirates of UAE, as well as in Oman, Kuwait, Qatar, and the landmark projects in Saudi-Arabia all include or feature wellness components.

The demand for wellness tourism is growing which is very promising since domestic as well as intra-regional demand is expected to grow as well.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



Dubai

With Linda Abdullah (ORYX) & Daniella Russell (DRG)



Dubai, UAE and the whole GCC has traditionally been strong in Hammams as part of a cultural tradition. The hammam has in recent years become more of an international experience, putting it on the spa/wellness map. Manicures & pedicures are also regular treatments due to the heat of the climate and the daily use of open shoes. For both men and women this is a maintenance treatment rather than beauty. The art of beautiful hands is highly admired in this region! Beauty in the form of make-up and hair care is extremely popular including men visiting the barber weekly if not twice a week. Hotels offering wellness-focusing staycations and to keep the experiential stays interested, they have added 'retreat' type packages. The Sleep Retreat is the most sought after, but the results of such programmes are the most difficult to monitor yet. Important development that younger generations tend to spend significant amount of their money on how they look, and that certainly includes beauty and wellness regimes, services and treatments.

Triggers

Segments

Facilities/Properties

Services/Treatments

De-stress

Guests looking for healthy options

Medical spa

Therapies based on natural resources

Self-reward

Groups of friends & Couples

Retreats

Traditional healing approaches

Indulgence & Pampering

Solo men & women

Spa resort & Hotel spa

Fitness & sports





Oman has not, yet, been placed on the international map for wellness travel. The existing services are more for the local, recreation-based interest. The treatment portfolio still is more on the traditional side determined by massages and body treatments. The market, however, shows changes. More locations and a growing variety of services are being introduced. Omanis who look for ,belonging' as a trigger organize ,spa-outings' for and with friends. New facilities such as resort-style retreats are being developed.

Triggers	Segments	Facilities/Properties	Services/Treatments
Relaxation	Couples	Resort retreats	Massage packages
Self-pampering/“me-time”	Groups of friends (women)	Day spas	Body & mind packages
Belonging	Solo women	Hotels spas	Beauty treatments

Turkey

With Belgin Aksoy & AKSOYGROUP
Hakan Balcan



Turkey is the home of ancient traditions such as thermal bathing or the hammam tradition and rituals. There are numerous great spa hotels/resorts and amazing thermal complexes. Local and international investors have been looking at the country as one with a huge potential in wellness. New properties and developments are in the pipeline incorporating a more integrative and/or holistic approach in the wellness programming. At the same time Turkey is a very popular medical tourism destination.

Triggers

Pampering & Self Rewarding

De-stress & Recharge

Self-healing & Escapism

Relaxation

Segments

Couples

Guest looking for healthy services

Solo women & Solo men

Groups of friends

Facilities/Properties

Wellness and Spa Hotel/Resort

Hotel Spa

Thermal Hotels

Turkish Baths

Services/Treatments

Detox & Weight loss programmes

Sports & Fitness

Spiritual practices

Therapies on natural resource

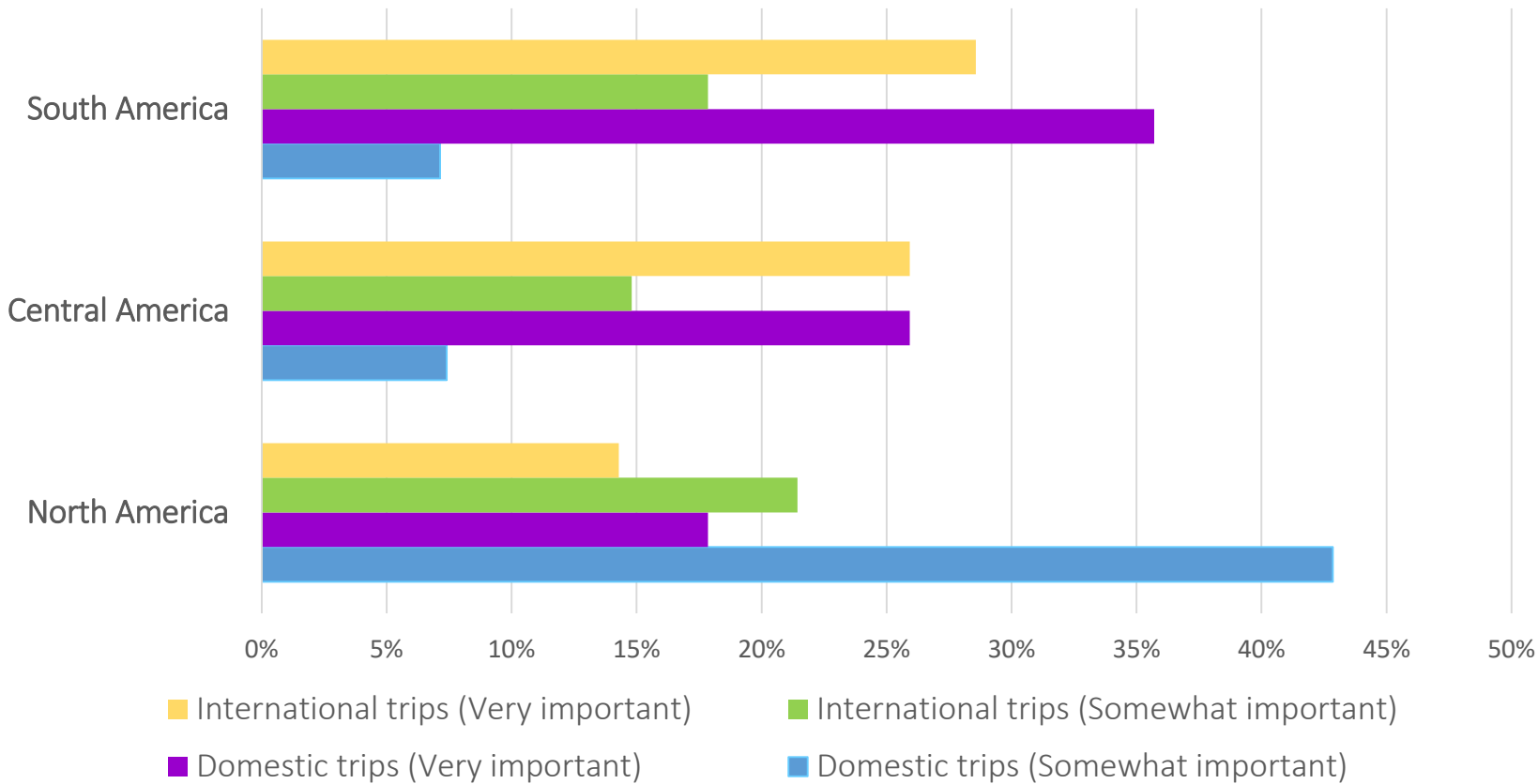


The Americas





Role of Wellness Travel – The Americas



The role and expected share of domestic and international wellness travel show a rather different pattern in the Americas.

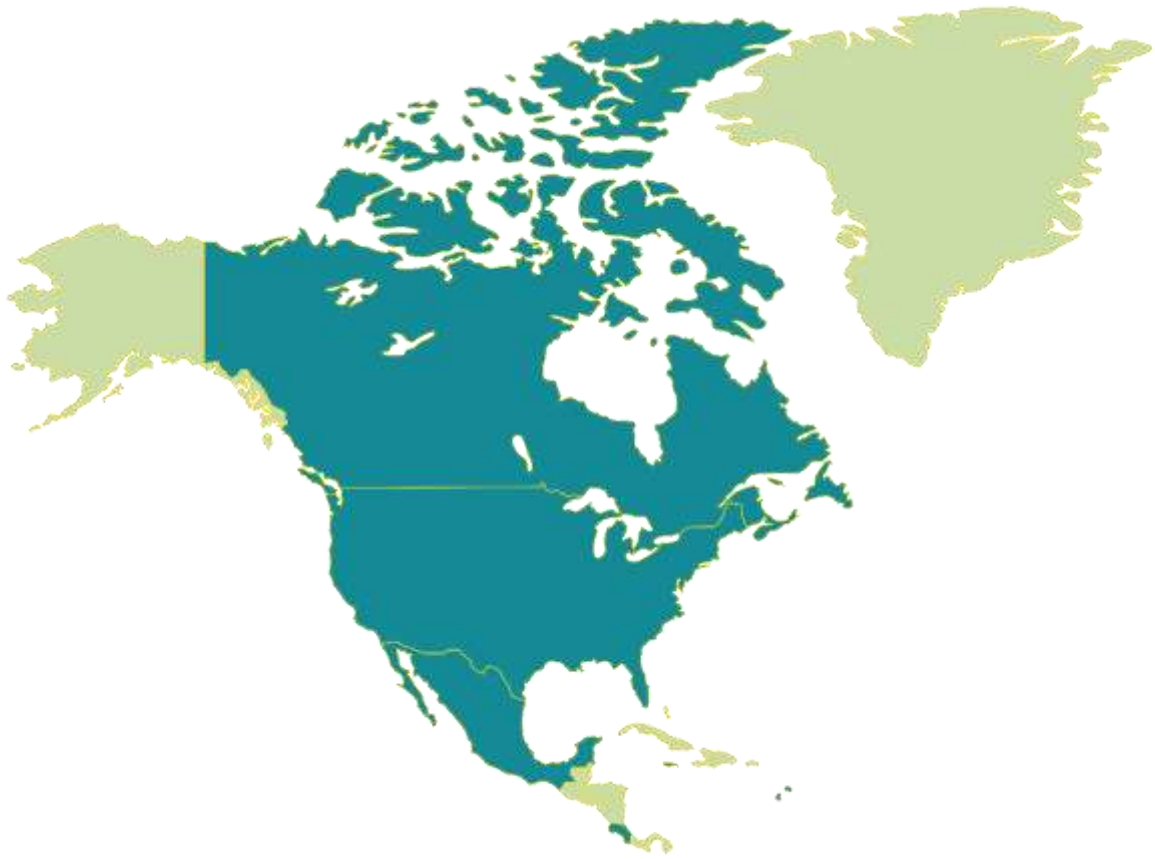
In Canada and the USA domestic, intra-country wellness motivated trips are expected to play an important role, whereas international either incoming or outgoing wellness trips are forecasted to have moderate growth potential.

For Mexico, Central and South America international, i.e. incoming wellness trips are more important than domestic ones.

Our partners repeatedly report that domestic wellness travel is still at its infancy state in many Central and South American countries. This however represents great opportunities for wellness and hospitality providers in the long run.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



North America



Photo by [Aksana Damaratskaya](#) on [Scopio](#)



Growth Opportunities – North America

Segments	Facilities/Properties	Services/Treatments
Solo women	Lifestyle oriented spa/retreat/resort + Destination spa	Psychological therapies (e.g. life coaching)
Couples & Groups of friends	Healthy living/co-working complexes	Nutritional and detox programmes
Guests looking for healthy services	Club spa (primary purpose is fitness)	Non-invasive plastic surgery
Same sex couples	Eco-spas & wellness facilities	Spiritual or wellness oriented festivals

The market development directions for North America represent a rather complex landscape.

The demand for wellness travel indicates that more and more segments of society are looking for wellness travel. The forecast suggests that several facility and property types may enjoy growth in the coming years from lifestyle oriented resort to eco-spas and wellness facilities.

The importance of mental health is echoed by the type of services and treatments with growth opportunities. Psychological therapies as well as spiritual festivals can provide the sought after mental balance.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study

Canada

With Amy McDonald



under a tree



Domestic travel for wellness is dominant in Canada. There is a small number of spa and wellness facilities offering wellness-improving services. Canadians travel within their own country largely due to their currency being much less than other currency's like the US dollar. For international wellness trips Canadians prefer to travel within the region of Europe, and the Caribbean. Canadians are not as accustomed to paying a premium for their wellness (due to socialized medicine) as other countries, specifically like the US. However growing numbers look for better ageing, lifestyle improving packages and it is slowly gaining momentum both in terms of awareness and understanding.

Triggers

Fitness

De-stress

Recharge

Segments

Solo travellers

Multigenerational Families

Groups of Women

Facilities/Properties

Adventure and Fitness
focused Resorts

Resort with Spa

Integrative Wellness Hotels

Services/Treatments

Nature inspired wellness
experiences

Science-based wellness
experiences



In the USA, domestic trips are dominant since the USA has so many great places to travel to, many wellness resorts, retreats and other facilities, and national parks, etc. Although the USA is the home of a number of landmark wellness facilities, still, wellness has not been a natural part of the lifestyle like in certain other parts of the world, and so there is an awakening happening. US travellers are accustomed to paying a premium for their wellness. The upper class and specifically boomers have money to spend on longevity and optimal aging and will go to other places in the world to gain knowledge and experience they can incorporate into their daily lives. Resorts and destinations with strong spa and/or wellness in Central America and in the Caribbean are popular destination for US wellness travellers.

Triggers

Relaxation

Pampering

Escapism

Segments

Families with Children

Couples

Groups of Couples (younger 30 to 45)

Facilities/Properties

Hotels with spas

Wellness Resorts

Thermal Spas (whether day or resort)

Services/Treatments

Integrative wellness packages

Lifestyle improving treatments

Optimal ageing packages

USA/Canada - Leisure Travellers

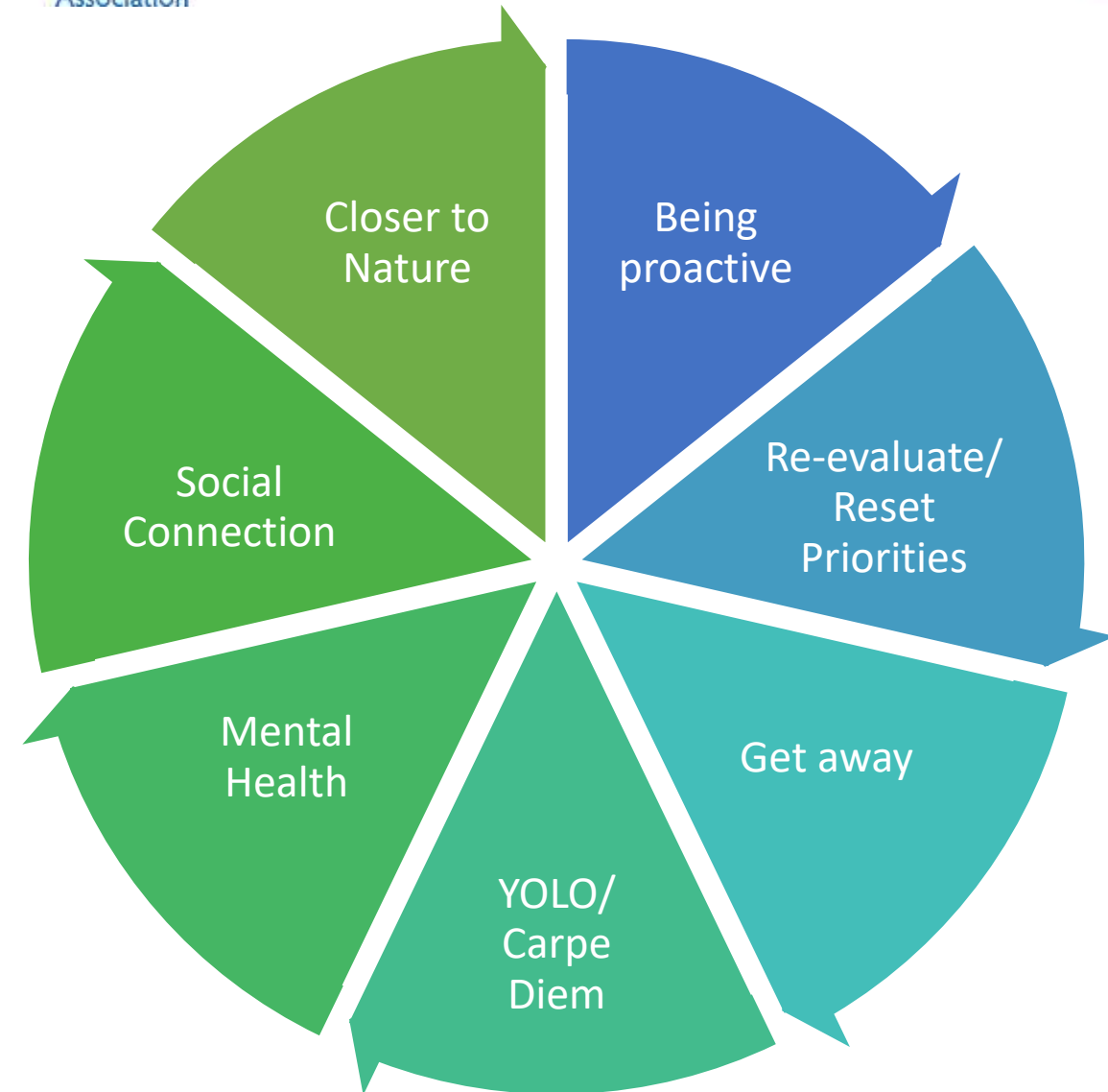
With the Wellness Tourism Association



In addition to the HTWW / WTA industry/academia research, the WTA polled close to 4,000 consumers on their motivations for taking a Wellness Vacation.

This study identified **7 emerging themes** that can help the industry in planning the way forward:

1. Looking for places where they can be closer to nature
2. Consumers show a growing degree of proactivity when they talk about their state of wellness
3. The pandemic made them re-evaluate and reset life priorities
4. They are looking at getting away of it all
5. Many apply the you-only-live-once approach to their lifestyle
6. It seems that the role and importance of mental health will be paramount, and
7. Social distancing has made people realize the true importance of social connections.





USA/Canada - Leisure Travellers

With the Wellness Tourism Association



Rest & Relaxation is the most prominent motivational theme

'To Return Feeling Rejuvenated' is the most highly-rated motivational statement

Millennials are most likely to be **planning a wellness vacation in the next two years**

Baby boomers are driven by the desire for **proactive self-care**

From the 2020 WTA Wellness Travel Consumer Survey, the 12 key consumer motivations for taking a Wellness Vacation suggests that wellness travel certainly has momentum in North America.

How hospitality, wellness, travel, leisure and recreation businesses along with DMOs take advantage of this opportunity will define the long term success and sustainability of the wellness tourism industry.

Desire to spend time in nature continues to be a prominent theme

Mental Health is an emerging theme, and so is a need for stress management seminars and digital detox

A Proactive Attitude to prevail, i.e. people are more concerned about their health and boosting immunity to avoid getting sick

Meeting 'Like-minded people' is association with wellness travel

Social Connection has become a more important focus for the wellness traveller

Safety & Trust are major concerns suggesting that established hospitality brands may have market advantage over individual properties

Nature orientation suggests **remote locations** will rise in popularity.

Baby boomers are driven by places to **learn new things about health and wellness**

USA/Canada – Business Travellers

With Sahara Rose de Vore



Pre-pandemic, there was a roaring corporate travel burnout epidemic that was wreaking havoc on employee's overall wellbeing. Consequently, poor traveller wellbeing leads to lowered work performance, decreased creativity levels, productivity loss, struggling employee retention, absenteeism, poor company culture, and high medical costs. It is understood that wellness adds value to trips, embraces purposeful and transformative travel, therefore it is recommended to be included in company culture as a general approach. Companies should invest in the betterment of their workforce in order to succeed as leaders in the future. There are 11 recommendations that help to make corporate travel more wellness orientated:

1. Provide proper wellness education and resources
2. Increase communication with travellers
3. Assess traveller's wellness needs and goals
4. Collect traveller feedback during and post-trip
5. Acknowledge as a corporate responsibility
6. Integrate into Risk Management Plan
7. Analyse policy flexibility and allowance
8. Incorporate Bleisure opportunities
9. Allow for the inclusion of a partner, spouse, or family member
10. Allow for extended stays
11. Collect traveller wellness feedback post-trip





As Mexico is perfectly positioned to cater to North America due to the proximity, time zones, openness during the pandemic and cost of living, there is a distinct rise in remote workers/ digital nomads. The climate, beach, nature and gastronomy are appealing to resort goers, wellness adventurers and those seeking transformational change via a retreat setting. A rise in wellness residential communities is anticipated as North Americans (and some Europeans) look for a place to spend time away from their home country.

Triggers	Segments	Facilities/Properties	Services/Treatments
Rest & relaxation	Couples	Destination resorts and spas (especially beachfront location)	Sound healing, breathwork & spiritual experiences
Transformation	Families with kids & Groups of friends	Thermal hot springs & cenotes (fresh water underground rivers)	Plant medicine retreats & Yoga
Escape	Solo women & men	Retreats & Community living	Fitness/Aquatic fitness



Central & The America Caribbean





Growth Opportunities – Central America & The Caribbean

Many destinations in Central America and in the Caribbean are popular among wellness enthusiasts. From stunning locations and spas, through innovative wellness programming to powerful holistic approaches guests can find a wide variety of options.

The regional forecast suggests that there will be a shift from solo travellers to group and family travel for wellness. Also, infusing wellness-improving services and experiences to any kind of trip appears to be a popular way to go.

In the next couple of years we will see many large scale wellness travel oriented properties entering the market.

Segments
Groups of friends
Couples
Families with children
Guests looking for healthy services

Facilities/Properties
Destination spa
Resort spa
Cruise ship spa
Adventure spas & wellness facilities

Services/Treatments
Massages & Beauty treatments
Alternative therapies (e.g. colour, sound)
Therapies based on natural resources
Spiritual/wellness oriented festivals



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study

Antigua & Barbuda

Spa & Wellness
mexicaribe

Wellness
footprints
ANTIGUA



With Sara Jones &
Tricia Greenaway

Antigua and Barbuda is geographically positioned to facilitate direct flights from the USA, Great Britain and Europe. This positioning allows for quick escapes for fatigued pandemic travellers. We have seen an increase in these types of travellers, especially from the USA. There has been an increase in stays at private properties due to the ease in adherence to the Covid19 protocols and social distancing. Most properties are accessible to the beach, which is one of the highly requested travel requirements. For people requiring wellness/therapy sessions while staying at these properties, outcall services are available on request. There has also been an uptick in spa attendance at resort spas amongst guests staying at these resorts.

Triggers

Self-care

Escape

Rest & Relaxation

Segments

Couples & Families

VIP/Celebrity Groups
(celebration)

Digital nomads

Facilities/Properties

Destination resorts and spas

Community living

Residential complexes

Services/Treatments

Massage and spa services

Holistic approaches & fitness
(yoga, sound healing, breathwork)

Nature and wellness (hiking,
bird watching, sailing, fishing)



Costa Rica has traditionally been a key destination for eco-travellers looking for pristine nature, birdwatching and adventure. Wellness complements the strong sustainability and nature orientation of Costa Rica. Visitors can find natural hot spring destination in breath taking locations, can enjoy organic local beauty and skincare products as well as spas from luxury to natural setting. The Instituto Costarricense de Turismo (ICT) is working on the definition and the implementation of a wellness tourism strategy that identified 6 core zones with individual wellness identities. The local market for wellness is also growing slowly. Pura vida!

Triggers

Escape

Re-charge

Self-gifting

Segments

Solo travellers

Couples

Groups of friends

Facilities/Properties

Adventure-wellness
hotels/camps

Eco-spa & wellness
resorts/retreats/camps

Resort spas

Services/Treatments

Adventure & Wellness
packages

Eco & Wellness packages

Plant-based packages



As a destination closely connected to nature, the island of Jamaica is perfectly positioned to offer a wide range of health and wellness offerings. Jamaican spa experts capture the healing powers of nature and the vibrancy of Caribbean culture to create quality spa treatments and wellness programs. Jamaican spa leaders have seen interest in day spas, all-inclusive wellness focused stays, luxury and mid-range beach vacations, transformational experiences, and wellness gastronomy. From North American and European travelers specifically, we have seen an uptick in stays from those working remotely and booking extended stays. These travelers look to include wellness as part of their stay.

Triggers

Rest & relaxation

Transformation (fitness & health)

Escape

Segments

Couples, Families & Groups

Solo travellers

Digital nomads

Facilities/Properties

Destination resorts & spas

Thermal/hot springs

Retreats & community living

Services/Treatments

Massages & spa services

Holistic approaches & fitness
(yoga, sound healing, breathwork)

Plant medicine retreats



South America





Growth Opportunities – South America

Segments	Facilities/Properties	Services/Treatments
Couples	Adventure spas & wellness facilities	Psychological therapies (e.g. life coaching)
Groups of friends	Wellness & Spa hotel/resort/centre	Medical wellness
Families with children	Club spa / fitness clubs	Complementary natural medicine
Guests looking for healthy services	Eco-spas & wellness facilities	Traditional healing approaches

South America has very rich cultural and natural resources that destine it to become a major magnet for the wellness seekers.

Natural hot springs have been traditionally important for domestic and intra-regional travel.

It seems that adventure and eco-based spas and wellness facilities can expect a great future in the coming years. The nature orientation can also be manifested in the wellness treatments and services, i.e. complementary natural medicine and traditional healing approaches will complement the more mainstream offerings.

Healthy and/or wellness services need also to cater for groups, i.e. friends and families.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study

Argentina

With Teresita Van Strate



Argentina has abundant thermal/hot spring resources that have been important pillars of domestic tourism. In the last 5 years, the awareness of the benefits in health prevention has significantly increased which is supported by hot spring based hydrotherapy services and resources. INPROTUR (National Institute for Tourism Promotion) has given special attention to wellness tourism since 2019 facilitating the clusterization of the stakeholders, and naming wellness as one of the key 'Argentine Tourism Experiences and Products'. We can see growing investments in wellness tourism in terms of infrastructure and real estate. The next phase in improving the wellness tourism provision is the focused training of human resources.

Triggers

Relaxation

De-Stress

Self healing

Segments

Families with children

Couples

Groups of friends

Facilities/Properties

Hotels with spa

Thermal parks/complexes

Health clubs

Services/Treatments

Massages

Balneotherapy

Complementary & alternative therapies

Brazil

With Gustavo Albanesi



Brazil is a vast country with amazing resources supporting wellness services and wellness tourism from indigenous healing traditions through lifestyle improving resorts to high-end (hotel) spa facilities. Physical beauty is of paramount importance in Brazil, therefore beauty, skincare and aesthetic programmes and services play a significant role in the wellness supply. The rich cultural and natural resources represent great potential for further product development. Brazil expects to receive way more attention in the coming years as it offers wellness related real estate investment as well as service development opportunities.

Triggers

Self-confidence

Rejuvenation

Relaxation

Segments

Solo woman

Couples

Clients looking for local wellness convenience

Facilities/Properties

Day spas

Club spas

Hotel with spas

Services/Treatments

Aesthetic procedures

Medical wellness

Relaxation services

Colombia

With Alejandra Millán



The relationship between wellness and travel has to do with the search of natural places in Colombia. The country spreads from the Caribbean Sea to the Amazonas and is the home of large number of different heritages. Colombia can allow people to be with themselves, to rest and relax. People can find retreats with specific activities such as transcendence, self-development, self-knowledge, healthy food, recharging energy with the nature and the knowledge of local communities. For the less holistic-minded, Colombian destinations offer relaxation through spas and natural hot springs in glorious settings. Investors look at Colombia as the destination with a great future in incorporating wellness, travel and hospitality.

Triggers

Recharge & Reward self

Self-development & Escapism

Transcendence

Segments

Couples

Groups of friends

Solo women & men

Facilities/Properties

Rural accommodation, homestay & eco-villages

Wellness hotels (especially thermal)

Glamping

Services/Treatments

Combining hiking, meditation and local healthy food

Ancient rituals using medicinal plants, energy therapies, holistic activities

Hydrotherapy circuits & Thermal immersion



Peru

With Sara Jones & Milagros Serrano



As part of the reopening and restart of tourism a new approach appears to be gaining momentum in Peru. It is anticipated that the provision of comprehensive and transformative experiences focused on health care and wellness can redefine the tourism supply. Hotels, spas, wellness centres and thermal centres have recognized the optimal way to retain guests is through conscious, sustainable and indigenous tourism offerings. Building on the rich culture, the traditional lifestyle rituals and the nature, guests can easily disconnect. Since the favourable health benefits of the Peruvian gastronomy has recently received a lot of attention worldwide the combination of gastronomy and wellness seems to be one of the prospective ways to go.

Triggers

Escape

Self-development

Disconnection

Segments

Solo travellers

Couples & Families

Groups

Facilities/Properties

Resort spas

Thermal centres with lodging

Holistic retreats/centres

Services/Treatments

Complementary and alternative medicine

Holistic outdoor rituals

Wellness gastronomy

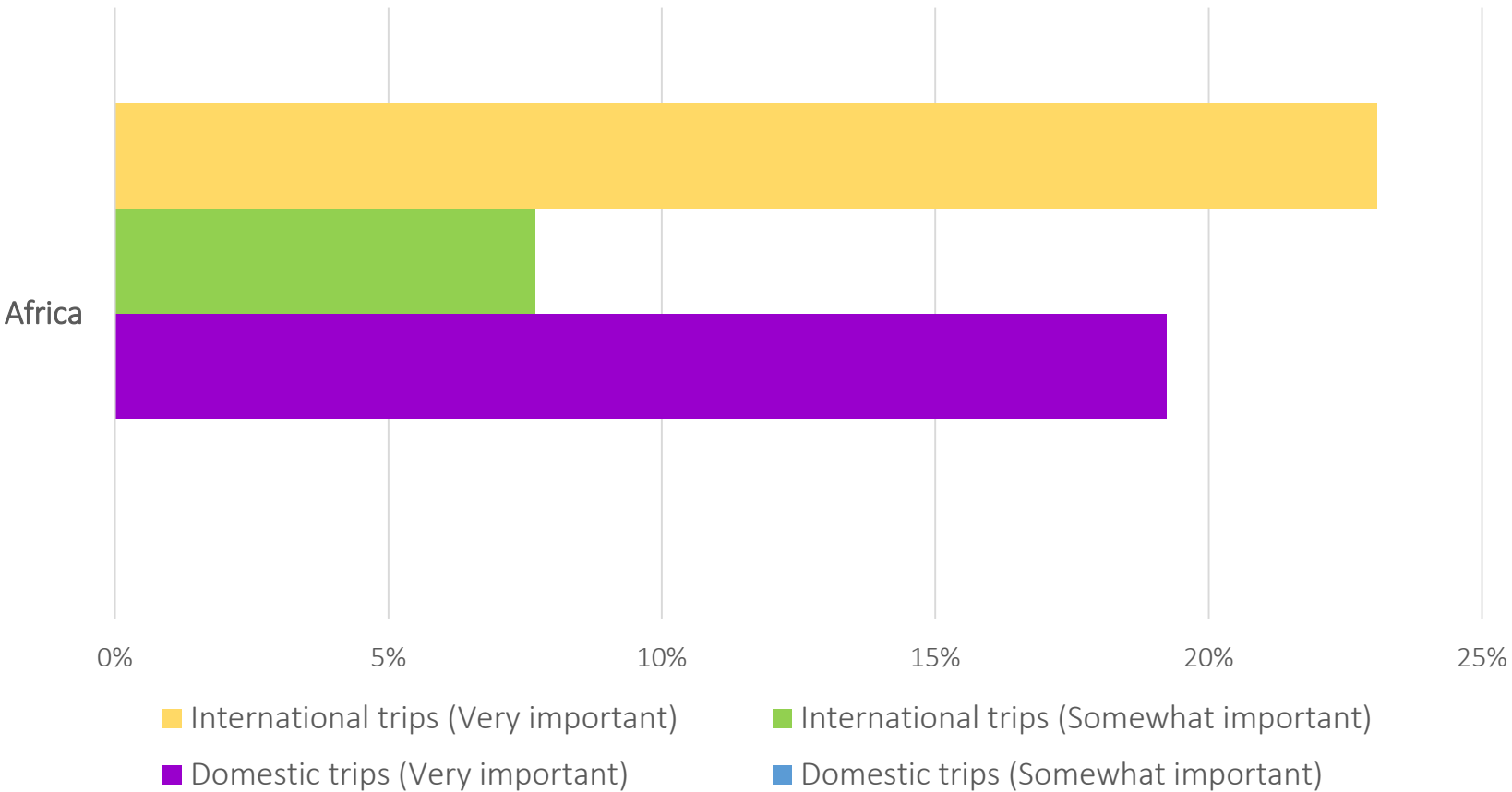


Africa





Role of Wellness Travel – Africa



Africa is probably one of the least discovered continents as far as wellness tourism goes. Of course, there are more developed countries, such as Morocco, Tunisia, Egypt or South Africa, still the cultural and natural assets of Africa are not yet really part of the international wellness tourism map.

The research, however, suggests that Africa can expect some changes in the near future. This will represent growing interest in international incoming travel for wellness. At the same time, domestic/intra-country wellness trips are also forecasted to show development.

Since the African continent represents a rather complex mix of cultures as well as natural sites, more detailed, local resources- based growth assessment can represent very different results country-by-country.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



Growth Opportunities – Africa

The regional forecast suggests that growth opportunities are abundant both in terms of real estate as well as treatment developments.

Beyond the more straightforward market segments it is important to mention that the 'wellnessification' of any or all services can represent great growth opportunities.

A wide range of facility types are forecasted to become popular from eco-spas to healthy hotels and resorts.

Natural healing approaches will build on the local heritage resulting in very competitive value propositions.

Segments
Couples
Guests looking for healthy options
Groups of friends
Solo women

Facilities/Properties
Eco-spas & wellness facilities
Adventure spas & wellness facilities
Healthy hotel/resort
Hotel spa (urban location)

Services/Treatments
Alternative therapies
Psychological therapies
Complementary natural medicine
Traditional healing approaches



How spa and wellness is considered by the population is changing rapidly in Kenya. One of the indications of this change is the rapid growth in group-based demand for spa and wellness. Urban dwellers are actively seeking wellness destinations and services they can visit with family and friends. The market is looking for preventative measures, solutions or tools either in person or online. Another big trend is that Kenyans are now more aware of body aesthetics than ever before. This is across all demographics. It is no longer cool to be fat. Children as young as those in grade 4 will not want their parents fat!

Triggers

Reward self

Recharge &

Rejuvenation

Segments

Solo women

Solo men

Groups of friends

Facilities/Properties

Adventure & spas/wellness centres

Sports & spas/wellness centres

Services/Treatments

Preventative services & treatments

Detox & nutrition

Body aesthetics

South Africa

With Marisa Dimitriadis



South-Africa has extensive wellness resources some of which are currently being incorporated under the banner of wellness tourism. The relationship between wellness and travel has often been top of mind for the international guests coming to South Africa. As one impact of the COVID19 pandemic, wellness has become one of the top considerations for domestic travellers. This shift has brought two opportunities for wellness and spa businesses One is the wider demand base for existing facilities and at the same time, the growing interest of investors in developing new facilities.

Triggers

Reward self

Recharge & Rejuvenation

De-stress & Self healing

Segments

Groups of friends

Families

Solo women

Facilities/Properties

Adventure & sports
spas/wellness centres

Eco-spas & wellness centres

Hot springs

Services/Treatments

Detox & nutrition programmes

Natural resources-based
treatments, e.g. outdoors

Mental wellbeing programme



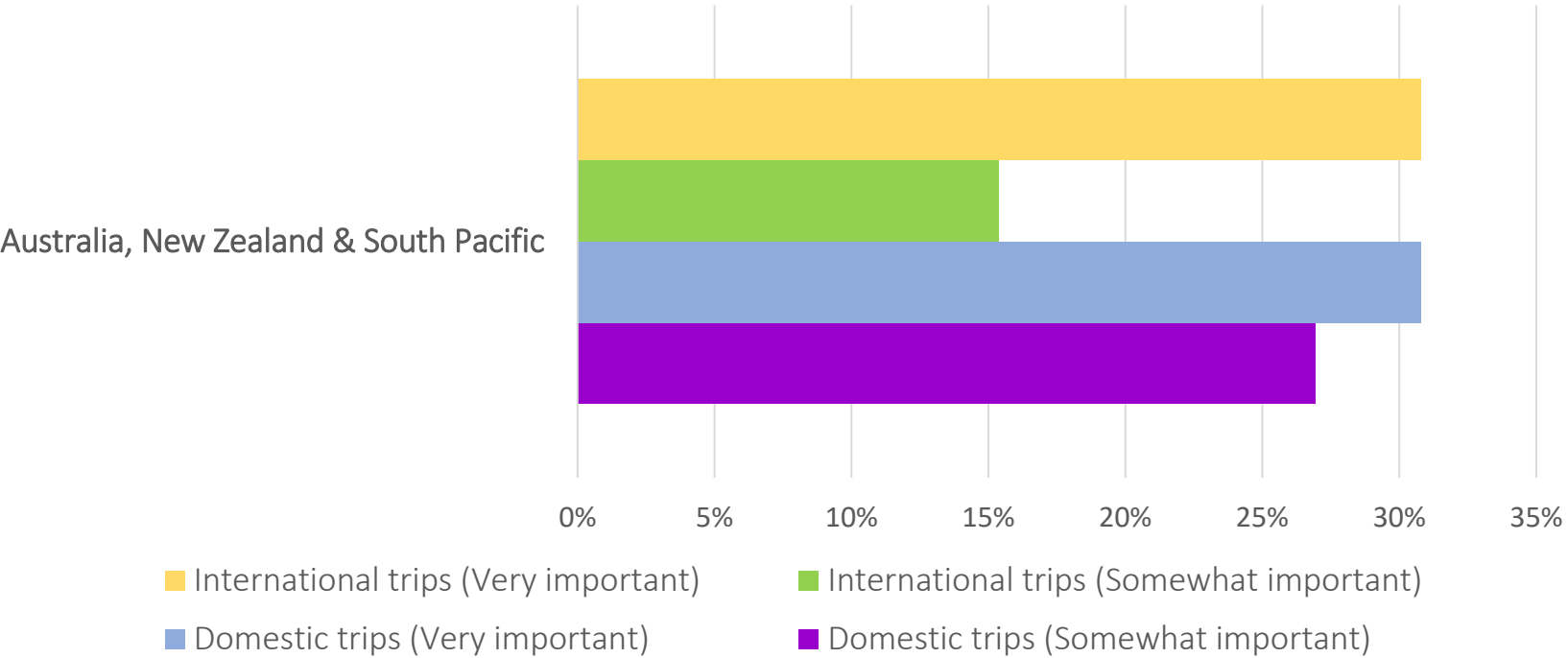
Australia,
New Zealand

&
South Pacific





Role of Wellness Travel – Australia, New Zealand & South Pacific



Although Australia, New Zealand and the South Pacific are often grouped together into one region, when it comes to wellness travel every country and island would need to be observed individually.

There are iconic destinations for wellness both in Australia and in New Zealand and travellers can find fabulous hotels spas on numerous islands. Still, we cannot yet say that wellness travel is a well-established product in the region. It is not on the governments’ agenda, travel agents do not as yet have the necessary product knowledge, and investors have also so far kept certain distance from such developments.

Initiatives, such as the one from In This Life Wellness Travel, i.e. the ‘Wellness Travel Agent Training Program’ intends to develop the industry’s awareness and understanding.



* Data extracted from the HTWWLife & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study



Growth Opportunities – Australia, New Zealand & South Pacific

Wellness travel is expected to be more of a social than a solo experience in the region.

The forecast suggests that many different types of wellness facilities/real estate may expect growth in the coming years from the combination of adventure and wellness to lifestyle oriented resorts and retreats.

This region is the only one where sport & fitness seems to be the most important service type by 2030! We should also not forget that therapeutic recreation is often very closely linked to sport activities.

Segments
Couples
Guests looking for healthy options
Groups of friends
Solo women

Facilities/Properties
Adventure spas & wellness facilities
Healthy hotel/resort
Lifestyle oriented spa/retreat/resort
Eco-spas & wellness facilities

Services/Treatments
Sports & fitness
Alternative therapies (e.g. colour, sound) & Fusion treatments
Spiritual or wellness oriented festivals
Therapeutic recreation



* Data extracted from the HTWW & WTA Study titled: Wellness Tourism 2030 Post-COVID19 – A Pioneering Study

Australia

With John T.G. Nielsen



Australia is known for many things but wellness travel may not be one of those, even if for example Byron Bay has developed a strong position in the holistic market. The COVID19 pandemic forced Australians to travel locally, i.e. the wellness resorts and hotels have become very popular. It is clear that travellers are looking for activities and programmes that can be done outdoors. More people became interested in plant-based and sustainable food, vegetarian eating and attending cooking classes as either part of the experience or as the sole purpose of their trip.

Triggers

Pampering

Stress relief

Fitness – Self-care

Segments

Groups of friends

Couples & Families together

Solo travellers

Facilities/Properties

Retreats incorporating nature

Hot springs

Wellness & Country Resorts

Services/Treatments

Fitness & better eating

Rituals, e.g. bathing and sleeping

Mental wellbeing packages

The Bottom Line

“What the report most signifies to me,” says **Anne Dimon**, President/CEO of the **Wellness Tourism Association**, “is that when it comes to wellness tourism, the world is certainly not on the same page, speaking the same language. MANY regions of the world continue to believe that wellness tourism is all about the spa experience. It is very evident that more education is needed on the topic.”

As **Keith Pollard**, the Chief Editor of the **International Medical Travel Journal** stated: „COVID-19 has complicated what is already a complex and confusing market for health and wellness travel. The report brings clarity to this challenging market, and highlights the need for destinations and service providers to refine and focus their product and marketing mix. Market segmentation and an in depth understanding of the drivers of wellness tourism are the key to success.”



The Bottom Line

This comprehensive summary and assessment of country-specific data and information confirms **HTWWLife's credo**: “We believe that every destination and project can have its very own identity as well as a unique experience and benefit proposition. Let those be hotels, spas, wellness centers, hospitals, clinics, retreats, hot springs, regions or destinations.”

As CEO & Co-founder of HTWWLife László Puczkó summarizes: “Although there may be some global meta and fashion trends, fundamental intelligence still needs to be collected from every country and from every market.”

The long term success of wellness travel and the sustainability of communities and destinations require hospitality, leisure, healthcare, recreation and spa/wellness investors to pay closer attention to local market information and forecasts. One size may not fit all as we can see from the country and regional data and forecasts.

Should you wish to add summaries of other countries, regions or destinations, please, feel free to contact us: laszlo@htww.life.

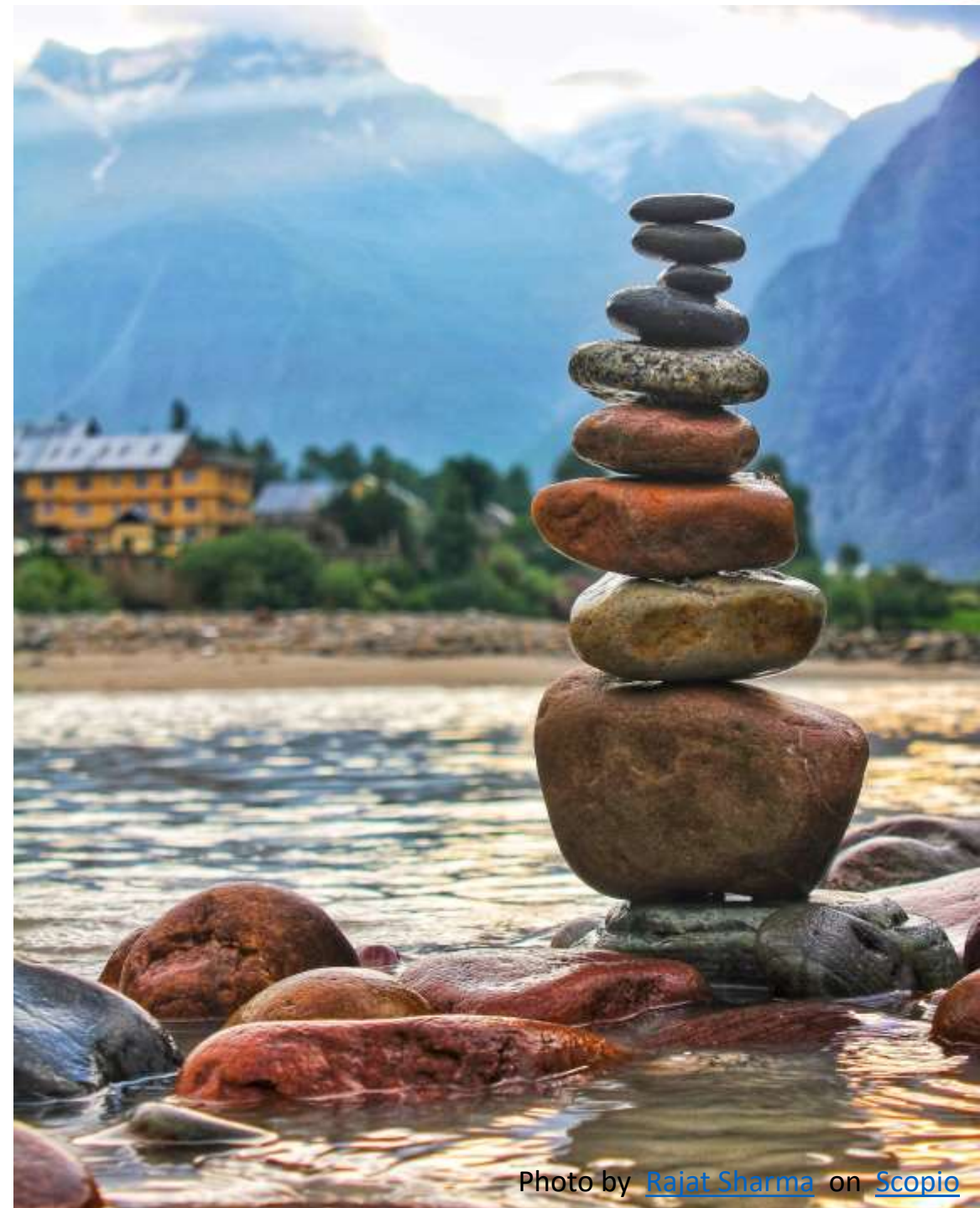


Photo by [Rajat Sharma](#) on [Scopio](#)





- Market Intelligence & Value Mapping
- Wellbeing Experience Engineering
- Wellnessification of Leisure & Travel
- Health, Medical & Wellness Destination Development & Marketing
- The WELligma Tool Box

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