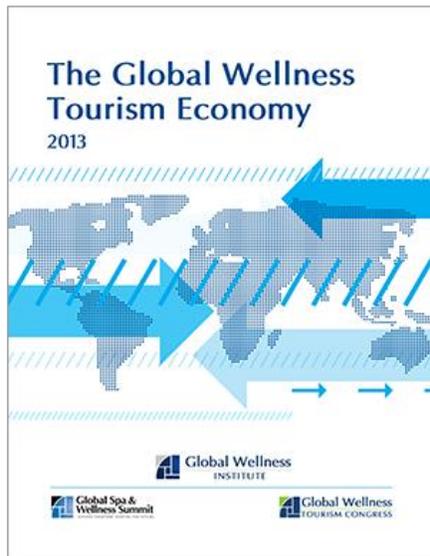


2013 *The Global Wellness Tourism Economy Report*



A new study presented at the inaugural Global Wellness Tourism Congress (GWTC) found wellness tourism is a near half-trillion dollar market, representing 14 percent of total global tourism revenues (\$3.2 trillion) overall. According to The Global Wellness Tourism Economy report, the category is projected to grow on average 9.9 percent annually over the next five years, nearly twice the rate of global tourism overall, reaching \$678.5 billion by 2017, or 16 percent of total tourism revenues.

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Key Findings

Percentage of Global Trips: While wellness tourism represents roughly one in seven total domestic and international tourism dollars (14 percent), it represents 6 percent of the number of international and domestic trips—or 524.4 million.

Powerful Impact on Jobs and Economies: Wellness tourism is directly responsible for \$11.7 billion global jobs, which delivers \$1.3 trillion in global economic impact—or 1.8 percent of the world’s GDP in 2012.

A Strikingly High-Yield Tourist: Wellness tourists spend, on average, 130 percent more than the average global tourist. An international wellness tourist spends roughly 65 percent more per trip than the average international tourist; the domestic wellness tourist spends about 150 percent more than the average domestic tourist.

“Primary” vs. “Secondary” Wellness Tourist Markets: SRI made a distinction between “primary” and “secondary” wellness tourists: the former defined as those taking a trip entirely for wellness purposes, the latter engaging in wellness-related activities as part of a trip. Not surprisingly, secondary-purpose wellness tourists constitute the significant majority (87 percent) of total wellness tourism trips and expenditures (86 percent). And while wellness tourists spend dramatically more than the average international or domestic tourist across the board, a secondary-purpose wellness traveler spends less than a primary.

Domestic Wellness Tourism Dominates: While tourism authorities tend to place an outsized focus on inbound, international travelers, domestic wellness tourism is actually significantly larger than its international equivalent—representing 84 percent of wellness tourism trips and 68 percent (or \$299

billion) of expenditures. International inbound wellness tourism represents a \$139 billion market (32 percent of total).

Europe and North America Dominate...For Now: While over 50 percent of the projected growth in wellness tourism through 2017 will come from Asia, Latin America, and the Middle East/North Africa, the SRI study found that today's typical wellness traveler is well-educated, well-off, middle-aged and hails from Western and industrialized nations. Europe and North America drive the outbound international wellness tourism segment, with five countries—the U.S., Germany, Japan, France and Austria—currently representing 63 percent of the global market. Additionally, the U.S., France, Austria, Germany and Switzerland drive the most inbound, international wellness tourism arrivals. Countries that attract the most domestic wellness tourism trips include: the U.S., Germany, Japan, China and France.

Spa Tourism Critical, but Not Majority of Market: Spa tourism is a core component of wellness tourism (41 percent of market), but non spa-related wellness tourism (whether “healthy hotels” and cruises; baths/springs; fitness, yoga or lifestyle retreats; travel to nature parks/preserves; organic/natural restaurant expenditures; and other “healthy” lodging and retail) represent 59 percent of the market.

“Wellness tourism is poised to reshape tourism as we know it. So many 21st century forces are fueling it, including the rise of chronic diseases and the unprecedented stress of modern life,” noted Jean-Claude Baumgarten, GSWS keynote speaker and former president and CEO of the World Travel & Tourism Council. “What people want to achieve during their ever diminished time off is undergoing a sea change, with millions more every year demanding destinations that deliver physical, emotional, spiritual and environmental health—along with enjoyment.”