

# GLOBAL SPA & WELLNESS ECONOMY MONITOR



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## **About the Global Wellness Institute**

The Global Wellness Institute (GWI) is the parent organization of the Global Spa & Wellness Summit and the Global Wellness Tourism Congress. GWI is considered the leading global research and educational resource for the global 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. 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 the 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.gsws.org](http://www.gsws.org)

## **About the Authors**

The *Global Spa & Wellness Economy Monitor* was prepared by SRI International in agreement with the Global Wellness Institute. The study was led by Ophelia Yeung, senior consultant, and Katherine Johnston, senior economist.

## **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 & development services for business and government clients around the world. [www.sri.com](http://www.sri.com)

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Global Spa & Wellness Economy Monitor

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# Executive Summary

September 2014



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# Executive Summary

## Wellness is a \$3.4 trillion mega-industry.

Individual health and well-being are universal desires shared by people across all ages, incomes, beliefs, cultures, and continents. The desires to be free of disease; to age well as we live longer; and to enable our minds, bodies, and spirits to fulfill their potential are as old as civilization itself.

Since 2008, the Global Spa and Wellness Summit (GSWS) and SRI International (SRI) have pioneered a construct that focuses on the preventive, proactive aspects of wellness. Among the landmark SRI-GSWS research studies are *The Global Spa Economy 2007* (2008), *Spas and the Global Wellness Market* (2010), and *The Global Wellness Tourism Economy* (2013). This inaugural issue of the *Global Spa and Wellness Economy Monitor* provides original data for three important components of the global wellness economy—the spa industry,



wellness tourism, and thermal/mineral springs—and integrates them into a wellness cluster framework, as we measure the size and scope of this global mega-industry.

The global wellness economy encompasses many industries that enable consumers to incorporate wellness into their lives—how they live, work, play, and travel. Collectively, the global wellness economy is estimated at \$3.4 trillion in 2013.

Since we began studying the size of the global spa economy in 2007<sup>a</sup>, the world has gone through major upheavals, including a financial market collapse and global recession; natural disasters such as earthquakes, hurricanes, tsunamis, and floods; and regime changes, civil wars, and cross-border conflicts. They have disrupted economies, destroyed jobs, reduced consumer spending, and depressed investments across the world.

Despite these events, the wellness economy has been growing rapidly in recent years because of converging global currents that defy temporary disruptions: population aging, widespread economic prosperity in emerging economies, the rise of lifestyle diseases associated with sedentary and stressful modern living, and the failure of the conventional healthcare paradigm to help people prevent illness.

As more and more consumers take preventive measures to maintain good mind-body health, prevent diseases, and to age well as they live longer, the demand for wellness industry products and services will only increase.

This study reports on the latest figures for the global spa and wellness tourism industries, presents new research on the global thermal/minerals springs industry, and explores key themes driving the future of the global wellness economy.

## 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 March to September 2014. Research included a review of recent literature and reports on spas, wellness, wellness tourism, and thermal/mineral springs, along with telephone interviews with numerous spa, wellness, and tourism stakeholders around the world. SRI also conducted a web-based global industry survey in June-July 2014, collecting more than 1,000 responses from spa and wellness industry stakeholders.

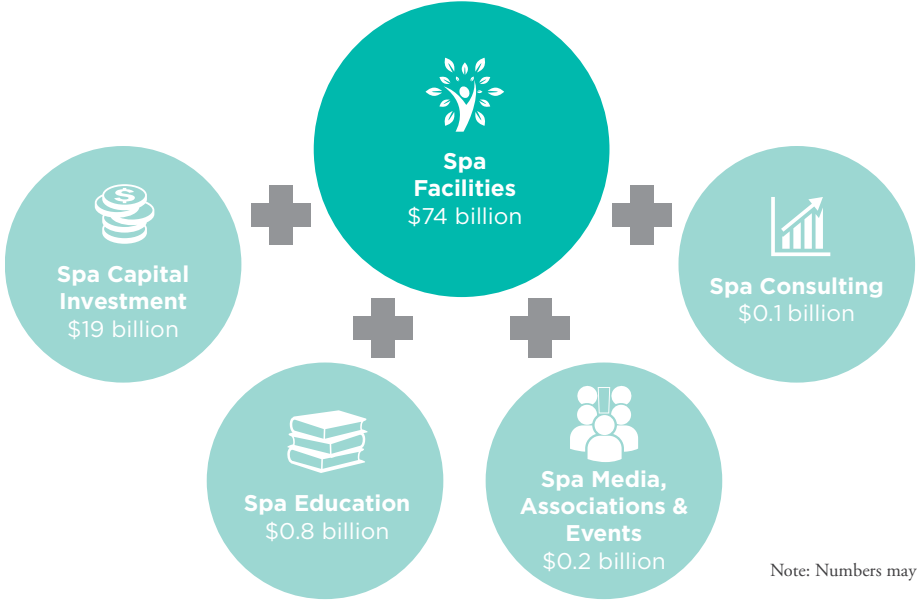
The estimates presented here on the size of the global wellness economy, spa industry, wellness tourism, thermal/mineral springs, and other subcomponents were developed by SRI International based upon our research and economic modeling techniques, and also based upon methodologies developed in previous studies for the Global Spa & Wellness Summit (GSWS). The development of these estimates drew upon previous industry data prepared by SRI International for GSWS, a wide variety of secondary sources, and qualitative inputs gathered through interviews and research.

# The global Spa Industry has grown significantly since 2007.

The spa industry has been growing by 7.7% annually, from \$60 billion in 2007 to \$94 billion in 2013. This industry is comprised of five interdependent segments. The largest segment is spa facilities, estimated at \$74 billion in 2013, a 7.9% annual increase since 2007. Spa media, associations, events, education, consulting, and capital investments together add another \$20 billion to the cluster. They provide vital services and activities that enable and support the spa industry.

The number of spas has increased by 6.7% annually since 2007 and is estimated at 105,591 in 2013. Spas employed more than 1.9 million people in 2013, compared to 1.2 million in 2007. Asia has surpassed Europe as the region with the largest number of spas. When revenues are considered, Europe is still the world's largest spa market, because of its relatively higher average revenues per spa.

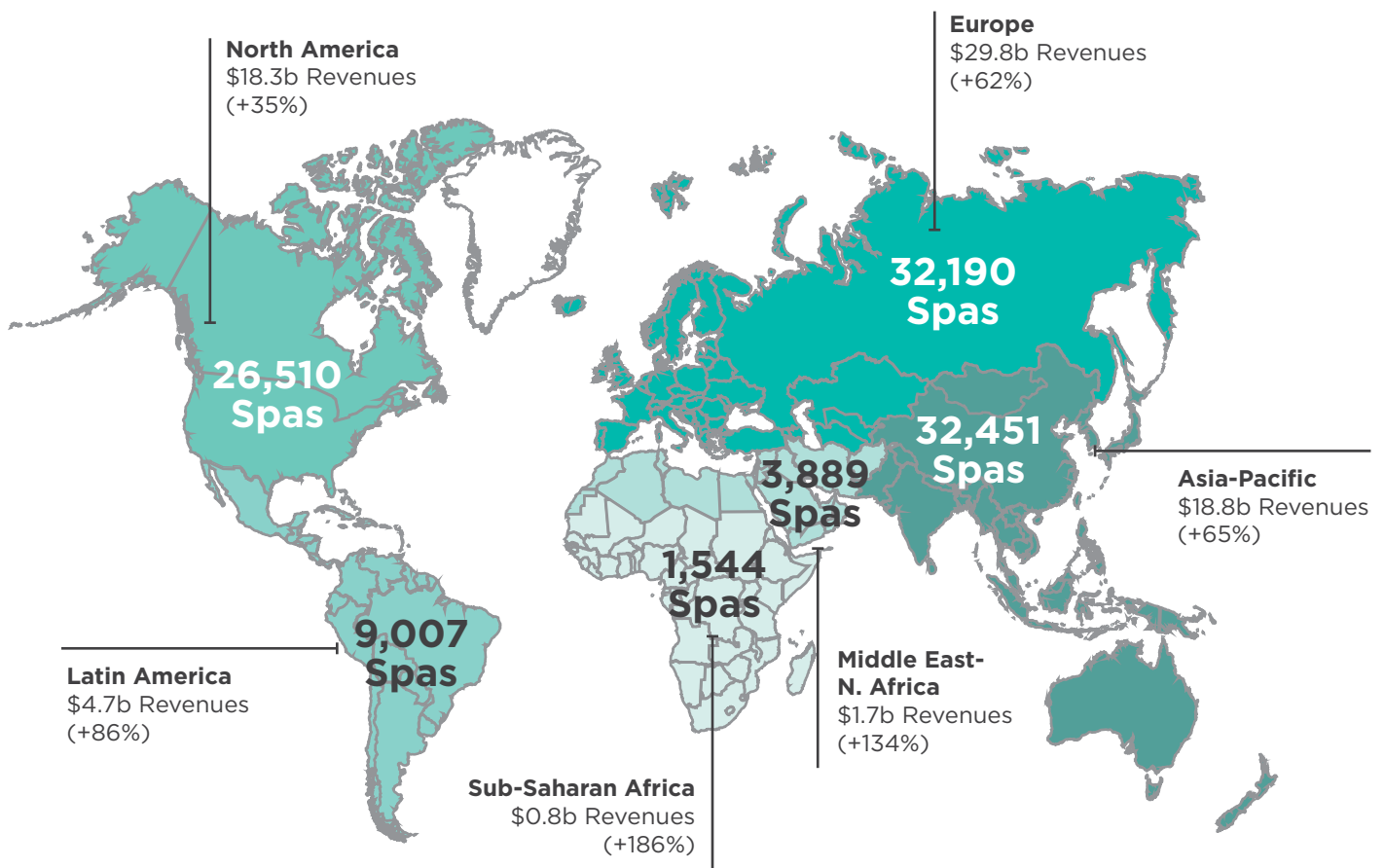
## Spa Industry Cluster: \$94 Billion in 2013



Not surprisingly, growth in spa revenues is not evenly distributed across the globe. The fastest growing regions in terms of revenue growth from 2007-2013 are Sub-Saharan Africa and Middle East-North Africa, where the spa industry grew from a low base, stimulated by rapid economic growth in some countries (e.g., South Africa, Nigeria, United Arab Emirates, Saudi Arabia) and by rapid tourism growth in others (e.g., Morocco, Kenya, Mauritius, Botswana). Spa industry growth in Asia and Latin America is driven by the economic expansion in emerging markets such as China, India, Brazil, Mexico, and Argentina. Strong growth in Europe reflects the resilience of several major Western European spa markets in the face of global recession (e.g., Germany, United Kingdom, France) and strong economic momentum to the east, including Russia, Poland, and Turkey. North America, a mature spa market of which the United States accounts for 89%, grew modestly despite an environment of slow economic and job growth.

## Spa Industry by Region, 2013

Number of spas, spa revenues, and revenue growth since 2007



# Consumers are extending their wellness lifestyles to their travels, stimulating global Wellness Tourism.

An ever-growing number of wellness-minded consumers are integrating healthy habits and activities into their travels, partly to counter a host of negative, travel-related health impacts such as jet lag, poor sleep, and disruption of healthy eating and exercise. In *The Global Wellness Tourism Economy<sup>b</sup>*, we defined wellness tourism as **travel associated with the pursuit of maintaining or enhancing one's personal well-being**. We also identified two types of wellness travelers: those who take a trip entirely for wellness purposes (**primary wellness travelers**) and those who engage in wellness activities as part of a trip (**secondary wellness travelers**).

Taking into account all travel expenditures made by primary and secondary wellness travelers, on both domestic and international trips, we estimate the wellness tourism economy to be \$494 billion in 2013. This represents a 12.7% increase from 2012.

## Wellness Tourism Industry \$494 billion in 2013



Note: Numbers may not add due to rounding.

Europe remains the largest wellness tourism market in 2013 (in terms of the number of trips). While wellness tourism growth exceeded overall tourism growth in all regions from 2012-2013, Asia-Pacific added the most trips in 2013, with an increase of 32 million additional wellness trips by inbound and domestic travelers.

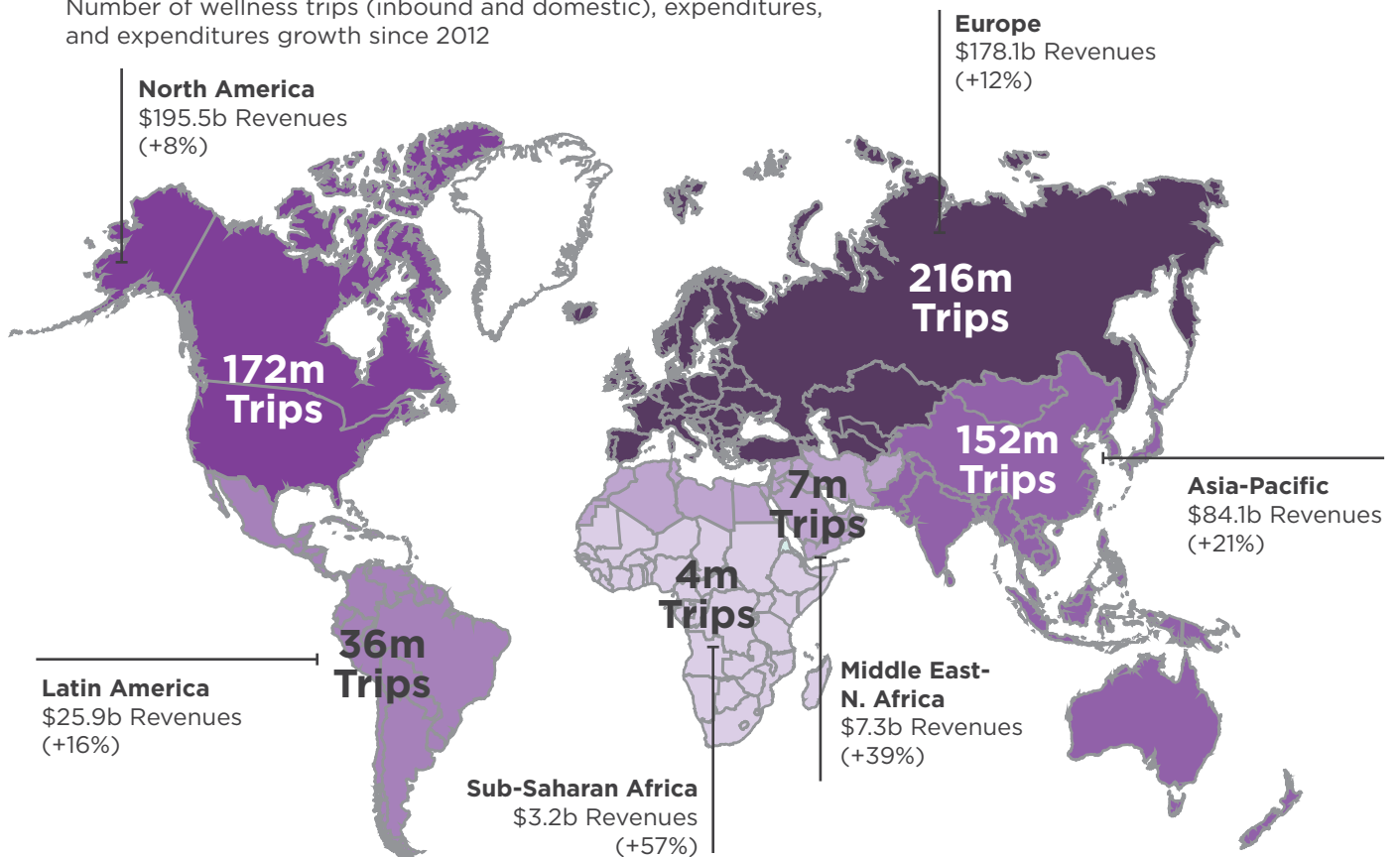
**Secondary wellness travelers**—those who seek wellness experiences as part of their trips—constitute the largest segment and account for 87% of wellness tourism trips and 84% of expenditures. The number of secondary wellness trips has grown faster than primary wellness trips from 2012-2013.

**Domestic wellness travelers** (both primary and secondary) represent 84% of all wellness tourism trips and 68% of expenditures. Domestic wellness tourism has been growing faster than international wellness tourism.

Because wellness travelers tend to be wealthier and more educated, their tourism spending is significantly higher than the average tourist, making them **“high-yield” tourists**. International wellness tourists spend 59% more and domestic wellness tourists spend 159% more than the average tourist.

## Wellness Tourism by Region, 2013

Number of wellness trips (inbound and domestic), expenditures, and expenditures growth since 2012

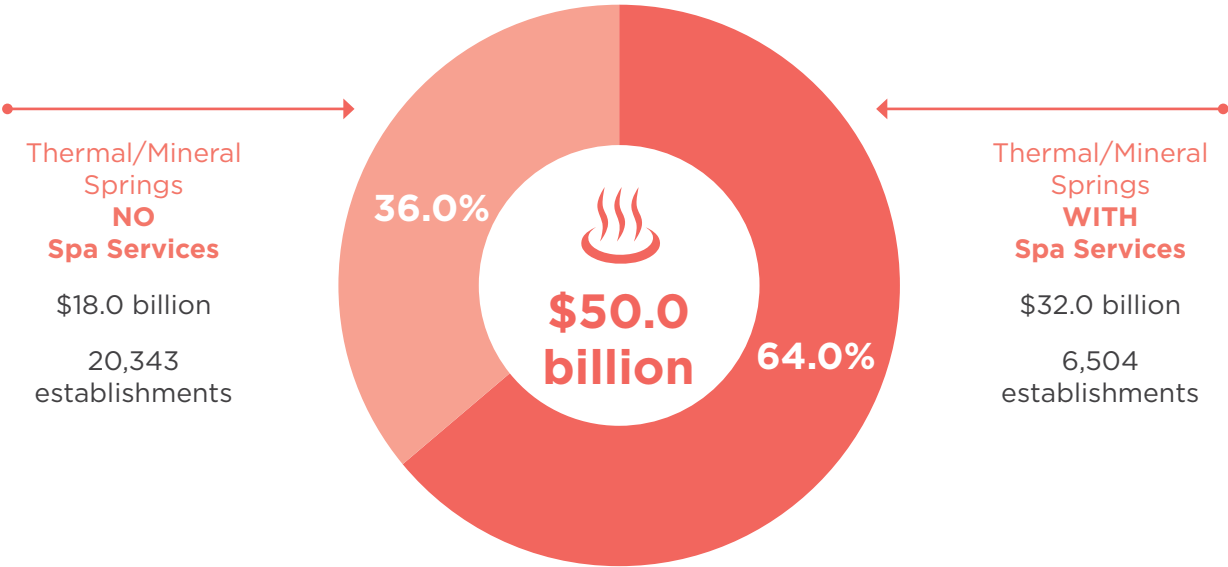


# Thermal/Mineral Springs are enjoying renewed consumer interest.

Throughout history, people have used thermal and mineral springs for bathing, healing, socializing, and spiritual reasons. Those traditions are the roots of today's spa industry, and they continue today. As consumers increasingly seek authentic, natural, and place-based experiences and expect results from their spa-going, there is a resurgence of interest in thermal/mineral springs around the world.

We count over 26,000 establishments in 103 countries that have wellness, recreational, and therapeutic facilities and services built around thermal/mineral springs. Collectively, these establishments earned more than \$50 billion in revenues in 2013. Only 6,500 of these establishments offer spa-related services (such as massage, facials, etc.) in addition to bathing and recreational offerings. Because they earn much higher average revenues, thermal and mineral springs establishments that offer spa treatments account for nearly two-thirds of industry revenues.

## Thermal/Mineral Springs Industry \$50 billion in 2013



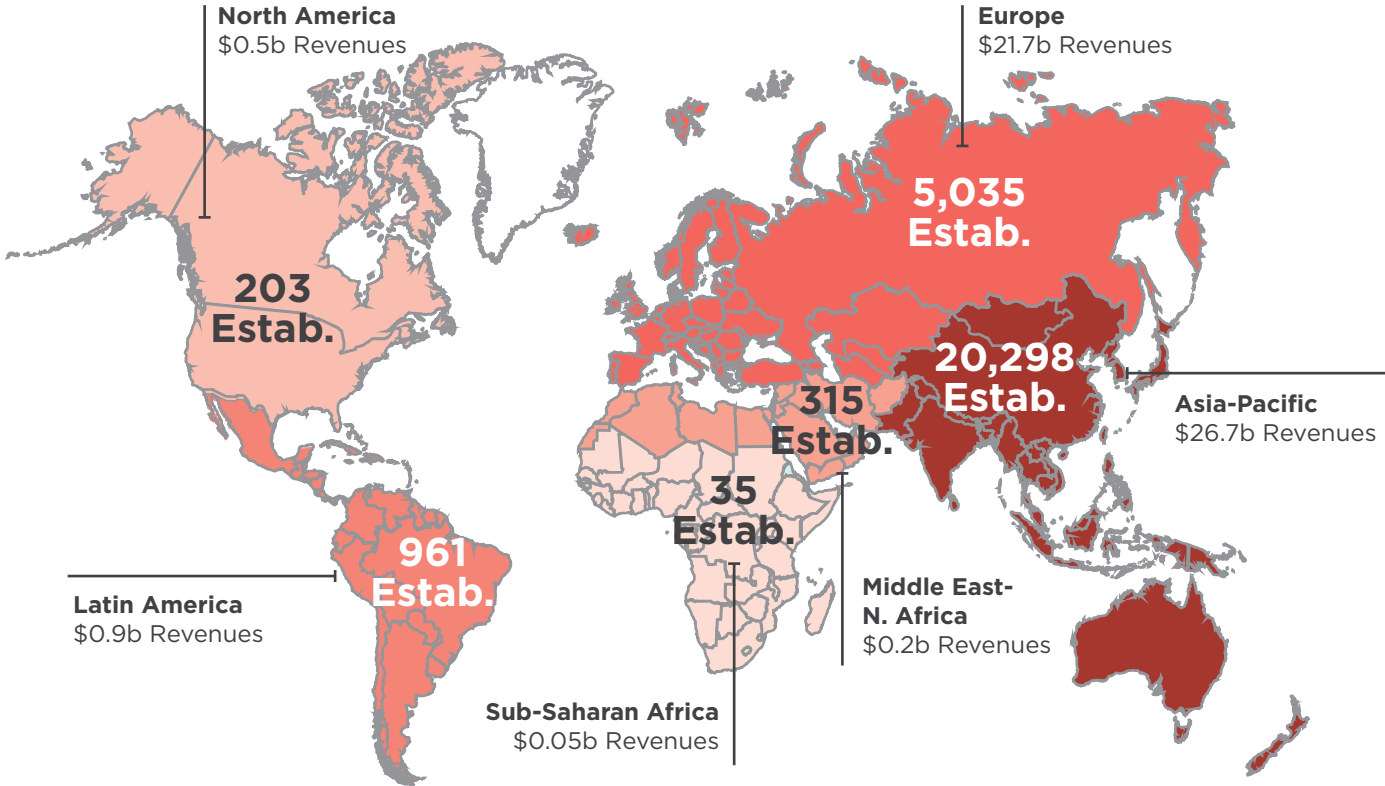
Asia leads the world in thermal/mineral springs revenues at \$26.7 billion, with the two main markets—Japan and China—accounting for 51% of global revenues. The Asian market is dominated by the thousands of onsen in Japan and the ongoing massive investments in hot springs resorts in China. The second largest region is Europe, estimated at \$21.7 billion, with a mature industry of sanatoria, health resorts, and thermal stations that use thermal and mineral waters primarily for therapeutic, curative, and rehabilitative purposes.

The global thermal/mineral springs industry is heavily concentrated in a small number of countries in Asia and Europe, where the industry is the most developed and is still flourishing. Globally, the top 10 countries account for 85% of thermal/mineral springs revenues and 88% of establishments.

As the renewed interest in the special properties of thermal and mineral waters continues to pick up momentum, we expect to see a growing number of businesses built around springs in countries where the industry is less developed. In the well-established markets in Europe, many countries are refurbishing their facilities and modernizing their offerings to appeal to modern wellness consumers and travelers.

**Thermal/Mineral Springs by Region, 2013**

Number of thermal/mineral springs establishments and revenues





# Many other Wellness Lifestyle industries enable consumers to take proactive approaches to their health and well-being.

The global wellness economy also encompasses many other activities that help consumers take proactive approaches toward integrating wellness into their daily lives—from what they eat to how they exercise and relax, from their homes to their workplaces, and from individual activities to professional services.

We estimate these Wellness Lifestyle industries added another \$2.8 trillion to the global wellness economy in 2013.

## Other Wellness Lifestyle Industries, 2013

Global Market Size*	(US\$ billions)
Healthy Eating, Nutrition, and Weight Loss	\$574.2b
Fitness and Mind-body	\$446.4b
Beauty and Anti-aging	\$1,025.6b
Preventive and Personalized Health	\$432.7b
Complementary and Alternative Medicine	\$186.7b
Workplace Wellness	\$40.7b
Wellness Lifestyle Real Estate	\$100.0b

\*Estimates by SRI International, drawing upon data from Nutrition Business Journal, IHRSA, Markets and Markets, Global Industry Analysts, IBISWorld, Cushman & Wakefield, Kaiser Family Foundation, PWC, WHO, and others.

# Spa & Wellness will continue to be a dynamic, high-growth industry as businesses innovate to meet global economic, travel, wellness, and lifestyle trends.

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While each spa market is unique and generalizations are too simplistic, we have observed several trends and themes across continents that put the global spa and wellness economy in context and suggest strong momentum in the future.

- **A growing global middle class will continue to expand the consumer base for spa and wellness industries.** Economic growth is rapidly enlarging the global middle class, which is projected to grow from the current 2 billion to almost 5 billion in 2030. This increase will be concentrated in emerging economies with large populations in Asia (e.g., China, India, Indonesia), as well as in Latin America, Africa, and the Middle East. As their incomes rise above the basic needs level, middle class consumers have discretionary funds to spend on goods and services that improve their lives, including spa and wellness. This rise of the global middle class will continue to drive the growth of the spa and wellness economy.
- **There is a shift in consumer attitudes toward taking personal responsibility for individual health.** Aging, the rise in lifestyle diseases, and the failure of the conventional medical system to pre-empt and treat chronic conditions are driving many consumers toward wellness and preventive services to maintain and improve their health. Spa-going, along with other wellness activities, are no longer considered a luxury or the domain of the wealthy. Many consumers now regard massage and hydrotherapy as treatments for daily stress and chronic pain, facials as essential to improving skin health and reducing the effects of aging, and reflexology as part of regular health maintenance.
- **Global tourism is growing, and tourists increasingly incorporate wellness into travel.** Tourism has been growing faster, and is projected to continue growing faster, than global economic output. Travelers increasingly seek to incorporate wellness into their trips, choosing hotels that offer healthy rooms, healthy menus, spas, fitness facilities, and other wellness offerings. The spa industry will continue to benefit from ongoing growth in tourism and the wellness tourism niche.

- **Businesses are innovating to serve an expanding base of wellness consumers.** As more consumers adopt wellness as part of their lifestyles, they create new demand for multiple price points and for increased convenience and accessibility. This has given rise to new business models. For example, franchising and membership, pioneered by the Massage Envy chain in the United States, are becoming more common in other markets (e.g., Buddha Spas in Brazil, Dragonfly Therapeutic Retreats in China). Likewise, consumer desire for convenience and one-stop service has led to the convergence of spas with other industries that did not self-identify as spas just ten years ago. For example, aesthetic clinics that have traditionally focused on beauty are now offering massage and body work. Meanwhile, establishments outside the spa industry are recognizing the efficacy of wellness services in complementing their customers' needs in terms of beauty, fitness, health, and rehabilitation. Salons, gyms and fitness centers, doctors' offices, and hospitals are adding massage and other spa-like offerings alongside their standard services.

As consumers grow more sophisticated, they are beginning to place a premium on wellness experiences that are associated with authenticity and results. Businesses have responded in different ways, including boutique hotels and resorts, locally-inspired built environments and spa treatments, adoption of traditional healing practices and local ingredients, and new investments in thermal and mineral springs. Entrepreneurship and business innovation across the world will keep the spa and wellness cluster dynamic and on a growth path that is firmly anchored to consumer demand.

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<sup>a</sup> SRI International, *The Global Spa Economy 2007*, May 2008.

<sup>b</sup> Global Wellness Institute and SRI International, *The Global Wellness Tourism Economy*, October 2013.

# Highlights



## Spa Industry

Spa industry growth since 2007 has far outpaced overall global economic growth (31% change in world GDP from 2007-2013).

### Spa Facilities

#### Number of Spas

105,591 (47% growth since 2007)

#### Revenues

\$74.1 billion (47% growth since 2007)

#### Employees

1.9 million (58% growth since 2007)

### Spa Industry

#### Revenues

\$94.0 billion (56% growth since 2007)



## Wellness Tourism

The number of people taking international and domestic wellness tourism trips grew by 12% from 2012 to 2013, 36% faster than overall tourism trips growth (estimated at 9%).

### Number of Wellness Trips

586.5 million (12% growth since 2012)

### Wellness Tourism Expenditures

\$494.1 billion (13% growth since 2012)



## Thermal/Mineral Springs

The world's thermal/mineral springs generate \$50 billion in revenues from wellness, therapeutic, and recreational uses.

### Number of Thermal/Mineral Springs Establishments

26,847

### Thermal/Mineral Springs Establishment Revenues

\$50.0 billion

Global Spa & Wellness Economy Monitor

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# Full Report

September 2014



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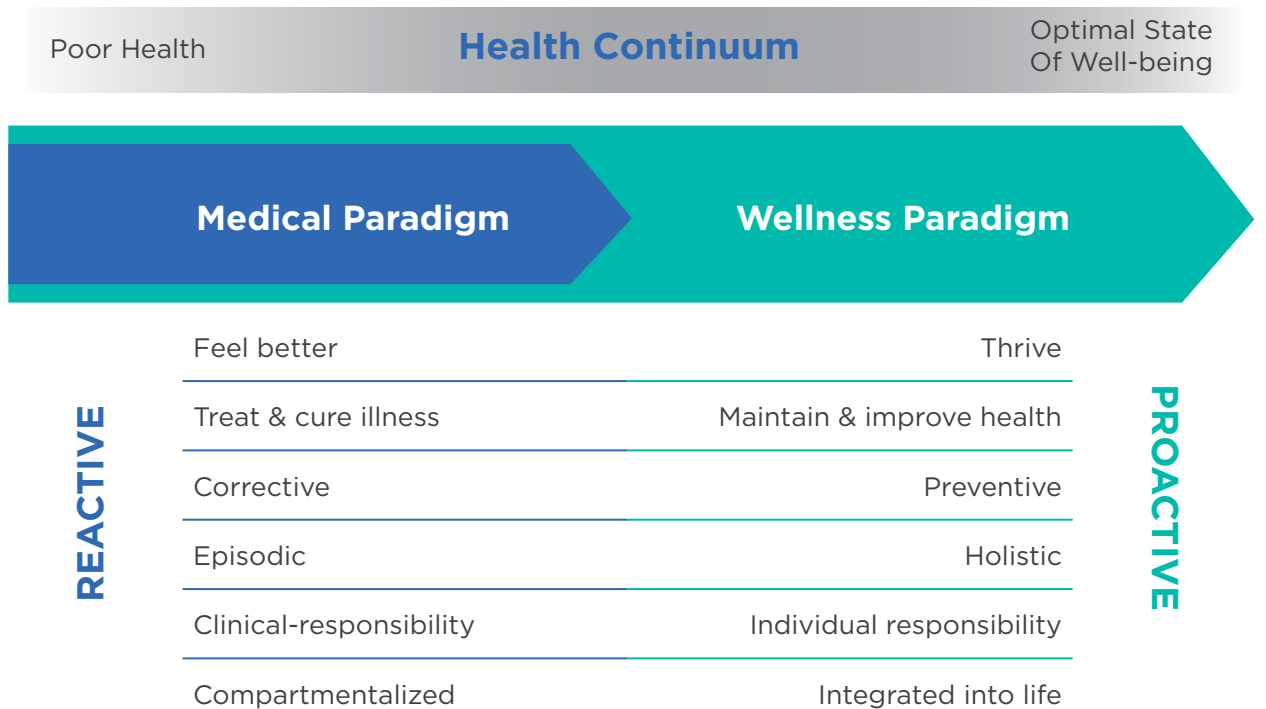
# I. The Global Wellness Economy

**Health and well-being represent universal human desires that transcend geographic, socioeconomic, and cultural boundaries.**

Aging populations and chronic diseases associated with the unhealthy modern lifestyle have been driving up medical costs around the world, demonstrating the limitations of the conventional medical paradigm of “sick care.” The rise of the wellness economy is a direct response to combat this trend, largely driven by consumer demand.

Wellness is best understood on a continuum that extends from poor health to a state of optimal

well-being (see below).<sup>1</sup> In contrast to the medical paradigm, which focuses on clinical, curative approaches, wellness is proactive, voluntary, and individually driven. Wellness-conscious consumers take initiative to integrate a variety of healthy habits and practices that prevent disease, improve health, enhance quality of life, and bring them to closer to an optimal state of well-being. These consumers form the backbone of the wellness economy.



## What Is Included In the Wellness Economy?

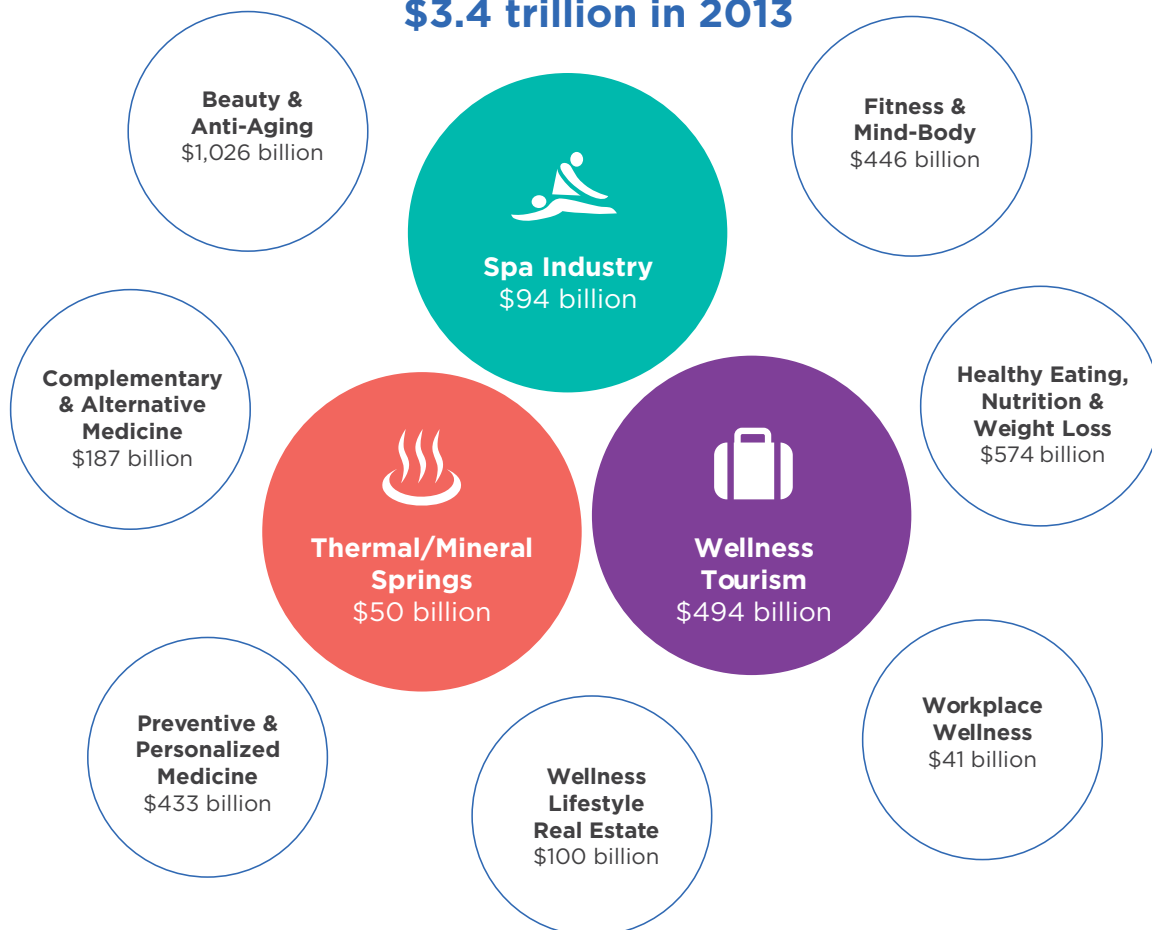
The wellness economy encompasses diverse industries and businesses that enable consumers to incorporate wellness into their daily lives. These goods and services help consumers extend wellness to their homes and their work environments; to what they eat; to how they exercise, relax, and travel; and to their healthcare.

We estimate this size of the global wellness economy to be \$3.4 trillion in 2013. Within this economy, we have estimated the size of the spa economy (\$94 billion), wellness tourism (\$494 billion), and thermal/minerals springs (\$50 billion). In addition,

we have identified a variety of other industries that cater to the multidimensional needs of individuals who are seeking a wellness lifestyle, which add another \$2.8 trillion to the global wellness cluster. These components will be described in detail in the following sections of this report.

1 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.

### Global Wellness Economy: \$3.4 trillion in 2013



Note: Numbers may not add due to overlap in segments.



## II. The Spa Industry

In the inaugural report *The Global Spa Economy 2007*, SRI and GSWS established a methodology for estimating the size of the global spa industry by defining spas as establishments that promote wellness through the provision of therapeutic and other professional services aimed at renewing the body, mind, and spirit.

We estimate the economic impact of establishments that consider themselves as “spas” and market themselves as such, as well as establishments that consumers would likely consider to be “spas” within their own national and regional contexts. This inclusive definition, without applying filters such as size or types of treatments offered, has been well aligned with global spa industry developments that increasingly incorporate local, cultural, and historical treatments and therapies into contemporary spa design and offerings.

In addition to spas themselves, there are many related businesses that support and enable the operation of spas. These include the spa education, media, associations, events, consulting, and investment sectors. Together with spa operations, this cluster of spa-related sectors is estimated to be \$94 billion in 2013, a significant increase over the \$60 billion reported for 2007.

### Global Spa Industry, 2007 and 2013

(US\$ billions)	2007	2013
Spa Facility Operations	\$46.81	\$74.06
Spa Capital Investments	\$12.99	\$18.75
Spa Education	\$0.31	\$0.82
Spa Media, Associations, & Events	\$0.13	\$0.22
Spa Consulting	\$0.07	\$0.11
<b>Total Spa Industry</b>	<b>\$60.31</b>	<b>\$93.95</b>

## Sectors Comprising the Global Spa Industry

**Spa facilities** are the core of the spa industry. Spas offer a wide variety of services (e.g., massages, facials, body treatments, salon services, water-based treatments, health assessments, and much more) as well as sales of related products. We estimate that spa operations around the world earned a combined \$74.1 billion in revenues in 2013.

**Spa capital investments** include expenditures on the construction and finishing of spa facilities, initial outlays for spa equipment and amenities, and expenditures for major upgrades and expansions of existing spas facilities beyond regular upkeep and maintenance. Global spa capital investments are estimated at \$18.7 billion in 2013.

**Spa education** encompasses individual expenditures by spa therapists and spa managers, both to enter the profession (initial degrees or certifications) and to advance in the industry (continuing education). The spa education sector includes training and certification programs offered by private and public trade schools, colleges, and universities; professional programs provided by hospitality, tourism, and business schools; and continuing education, workshops, and short

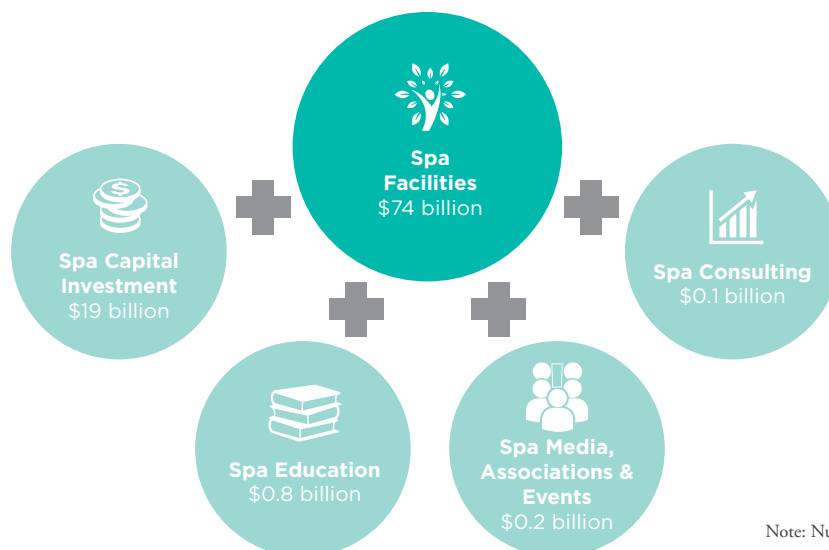
courses offered by associations, private companies, and nonprofits. Taken together, expenditures on spa education are estimated at \$816 million in 2013.

**Spa media, associations, and events** represent important activities that support and promote spas and bring the industry together. They are combined into one sector because these activities are frequently conducted by businesses that are engaged in all of them. For example, spa associations often organize trade shows while also publishing magazines and operating websites that promote the industry. This sector is estimated at \$223 million in 2013.

**Spa consulting** includes many activities: conceptualization, design, and branding of new spas; spa management and training solutions; spa research and benchmarking; and other related services. This sector is characterized by highly specialized companies often led by former high-level executives in the spa industry, as well as small units within larger consulting firms that have a spa practice. Spa consulting is valued at \$108 million in 2013.

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### Spa Industry Cluster: \$94 Billion in 2013



Note: Numbers may not add due to rounding.

## Number and Types of Spa Facilities

The \$74 billion in spa facility revenues in 2013 were earned by 105,591 spas, which include six categories of spas listed below. Because of their large numbers, day/club spas account for the highest share of spa revenues, followed by hotel/resort spas.

**Day/club/salon spas** offer a variety of spa services (e.g., massage, facials, body treatments, etc.) by trained professionals on a day-use basis. Club spas are similar to day spas, but operate out of facilities whose primary purpose is fitness. Salon spas operate out of facilities that provide beauty services (such as hair, make-up, nails, etc.).

**Destination spas and health resorts** offer a full-immersion spa experience in which all guests participate. All-inclusive programs typically include, in addition to spa and body treatments, a myriad of other offerings such as: fitness, mind/body, special diets and cleansing, personal coaching, nutrition counseling, weight loss, preventive or curative medical services, etc.

**Hotel/resort spas** are located within a resort or hotel property, providing spa services on an à la carte basis to hotel guests and outside/local guests. Spa

treatments and services generally complement a hotel stay or a wide range of other activities at a resort.

**Thermal/mineral springs spas** include day-use spa facilities and destination/health resorts that incorporate an on-site source of natural mineral, thermal, or sea water into their spa treatments, as well as thermal and mineral water bathing or recreational establishments that offer spa services such as massage, facials, hydrotherapy, etc.

**Medical spas** operate under the full-time, on-site supervision of a licensed healthcare professional, providing comprehensive medical and/or wellness care in an environment that integrates spa services with traditional, alternative, or cosmetic medical therapies and treatments.

**Other spas** include all other facilities that are not captured by the categories described above, such as cruise ship spas, airport spas, mobile spas, as well as historically-/culturally-based facilities (e.g., Japanese onsen, Turkish hammams, Indian Ayurveda centers, etc.) that have incorporated spa-like services into their offerings.

### Spa Facilities by Type, 2007 and 2013

	Number of Spas		Revenues (US\$ Billions)	
	2007	2013	2007	2013
Day/Club/Salon Spas	45,113	59,339	\$21.0	\$30.5
Hotel/Resort Spas	11,489	22,076	\$12.6	\$22.2
Destination Spas & Health Resorts	1,485	2,204	\$6.2	\$8.4
Medical Spas	4,274	5,009	\$4.6	\$5.4
Thermal/Mineral Springs Spas*	n.a.	6,504	n.a.	\$4.8
Other Spas	9,311	10,459	\$2.4	\$2.7
<b>Total Spa Industry</b>	<b>71,672</b>	<b>105,591</b>	<b>\$46.8</b>	<b>\$74.1</b>

\* In the 2007 figures, Thermal/Mineral Springs Spas were not included as a separate category, and were instead grouped under the Other Spas and Destination Spas & Health Resorts categories. Note: Revenue figures may not sum due to rounding.

## Spa Employment and Workforce Projections

The world's 105,591 spas employed an estimated 1.9 million persons in 2013, including about 1.1 million spa therapists and 200,000 spa managers and directors. If the spa industry continues growing at the same rate at which it grew from 2007-2013, then there will be a projected 2.7 million persons employed by spas in 2018. An additional 500,000 trained spa therapists and 80,000 experienced spa managers/directors (above the current levels) will be needed by the industry in 2018.

## Global Distribution of Spas

Spas are found in all corners of the world, distributed across 203 countries. However, the majority of the industry is concentrated in three regions: Europe, Asia-Pacific, and North America, which together account for 86% of the world's spas. Asia has surpassed Europe to rank number one in the number of spas and has risen to second place in terms of spa revenues.

Among the world's top 20 largest spa-going countries in terms of revenues, all are located within the three top regions (as shown in the table above), with the exception of Mexico and Brazil. The five largest countries in terms of revenues (United States, Germany, Japan, China, France,) account for 49% of industry revenues worldwide. The twenty largest countries, as shown in the following table, account for 80% of world revenues. Fifteen countries in the world have spa revenues over \$1 billion annually.

Since 2007, China has entered the top five markets in terms of revenues, Russia entered the top ten, and Indonesia, Poland, and Brazil entered the top twenty.

### Spa Employment by Region, 2007, 2013, and 2018 (Projected)

	2007	2013	Projected Need in 2018
Europe	441,727	678,920	911,400
Asia-Pacific	363,648	614,202	863,400
North America	307,229	397,381	489,100
Latin America-Caribbean	82,694	141,025	214,800
Middle East-North Africa	20,938	57,308	175,700
Sub-Saharan Africa	7,273	20,822	65,700
<b>Total Spa Industry</b>	<b>1,223,509</b>	<b>1,909,658</b>	<b>2,720,100</b>

## Spa Facilities by Region, 2007 and 2013

	Number of Spas		Revenues (US\$ Billions)	
	2007	2013	2007	2013
Europe	22,607	32,190	\$18.4	\$29.8
Asia-Pacific	21,566	32,451	\$11.4	\$18.8
North America	20,662	26,510	\$13.5	\$18.3
Latin America-Caribbean	5,435	9,007	\$2.5	\$4.7
Middle East-North Africa	1,014	3,889	\$0.7	\$1.7
Sub-Saharan Africa	388	1,544	\$0.3	\$0.8
<b>Total Spa Industry</b>	<b>71,672</b>	<b>105,591</b>	<b>\$46.8</b>	<b>\$74.1</b>

Note: Revenue figures may not sum due to rounding.

## Top Twenty Spa Markets, 2013

	Number of Spas	Employment	Revenues (US\$ billions)	Rank in 2013 (2007 Rank)
United States	22,852	354,610	\$16.25	1 (1)
Germany	5,575	126,481	\$5.97	2 (3)
Japan	6,958	113,397	\$5.95	3 (2)
China	9,452	225,341	\$4.70	4 (7)
France	3,556	70,232	\$3.12	5 (4)
Russia	2,728	101,373	\$2.91	6 (13)
Italy	2,679	61,398	\$2.76	7 (5)
United Kingdom	2,964	52,908	\$2.51	8 (6)
Spain	2,432	45,381	\$2.14	9 (8)
Canada	3,658	42,771	\$2.04	10 (9)
Austria	1,200	29,507	\$1.65	11 (11)
South Korea	2,805	36,751	\$1.38	12 (10)
Mexico	2,765	44,839	\$1.36	13 (12)
India	3,956	47,666	\$1.15	14 (19)
Switzerland	687	17,925	\$1.14	15 (14)
Thailand	2,088	66,816	\$0.98	16 (18)
Indonesia	1,668	51,343	\$0.83	17 (37)
Australia	968	10,292	\$0.82	18 (15)
Poland	979	17,460	\$0.72	19 (23)
Brazil	1,325	17,350	\$0.62	20 (26)

## Spa Industry Economic Impact

The spa industry’s economic impact includes the direct revenues and employment generated by spa facilities and other associated spa sectors, along with their indirect and induced (or multiplier) effects on the overall economy. 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 spa is then spent by the spa owner to purchase goods and services for the spa facility. The producers of these goods and services must, in turn, increase production—these are indirect effects. In addition, spa employees spend much of their incomes 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.

Overall, in 2013, the \$94.0 billion spa industry generated a total economic impact of \$277.1 billion for the world economy, including the direct indirect, and induced economic impacts of core spa industry activities (spas, consulting, education, media, associations, events, and capital investment).

### Economic Impacts of the Spa Industry, 2013

	Spa Industry Direct Impact	Indirect & Induced Impacts	Spa Industry Economy-Wide Impact
Spa Industry Revenues	\$94.0 billion	→	\$277.1 billion
Employment	1.9 million jobs	→	5.0 million jobs

# III. The Wellness Tourism Industry

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**Wellness tourism is a growing niche segment of the global tourism market, as wellness-minded consumers integrate their values and lifestyles into their travels.**

Consistent with the definition in our 2013 wellness tourism study<sup>1</sup>, we define wellness tourism as *travel associated with the pursuit of maintaining or enhancing one's personal well-being*.

Adding up all expenditures made by international/inbound and domestic, primary and secondary wellness tourists (see box), we estimate the wellness tourism industry to be \$494 billion in 2013, a 12.7% increase over 2012. Wellness tourism accounts for 14.6% of all tourism expenditures and is growing much faster than the 7.3% growth rate for overall tourism expenditures from 2012-2013.

The \$494 billion in wellness tourism expenditures represent 586.5 million wellness trips taken in 2013, across 211 countries. Wellness tourism accounts for about 6.2% of all domestic and international tourism trips taken in 2013.

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<sup>1</sup> Global Wellness Institute and SRI International, *The Global Wellness Tourism Economy*, October 2013.

## Wellness Tourism Methodology

Our figures examine two segments of wellness tourists:

**Primary Purpose Wellness Tourists:** Wellness is the sole purpose or the motivating factor for their trip and destination choice

**Secondary Purpose Wellness Tourists:** Seek to maintain their wellness or participate in wellness experiences while taking any type of trip.

We measure the wellness tourism industry by estimating all expenditures made by both primary and secondary wellness travelers, including expenditures on lodging, food and beverage, activities and excursions, shopping, and in-country transportation.

Our estimates include two types of tourism expenditures:

**International wellness tourism receipts:** All receipts earned by a country from inbound wellness tourists visiting from abroad, with an overnight stay.

**Domestic wellness tourism expenditures:** All expenditures in a country made by wellness tourists who are traveling within their own country's borders, with an overnight stay.

## Wellness Tourism Trips and Expenditures, 2012 and 2013

	Number of Trips (Millions)		Expenditures (US\$ Billions)	
	2012	2013	2012	2013
International/Inbound Wellness Tourism	86.2	95.3	\$139.5	\$156.3
Domestic Wellness Tourism	438.3	491.2	\$299.1	\$337.8
<b>Total Wellness Tourism Industry</b>	<b>524.4</b>	<b>586.5</b>	<b>\$438.6</b>	<b>\$494.1</b>

Note: Figures may not sum due to rounding.

## Wellness Tourism by Region, 2012 and 2013

	Number of Trips (Millions)		Expenditures (US\$ Billions)	
	2012	2013	2012	2013
North America	163.0	171.7	\$181.0	\$195.5
Europe	202.7	216.2	\$158.4	\$178.1
Asia-Pacific	120.0	151.9	\$69.4	\$84.1
Latin America-Caribbean	31.7	35.5	\$22.4	\$25.9
Middle East-North Africa	4.8	7.0	\$5.3	\$7.3
Sub-Saharan Africa	2.2	4.2	\$2.0	\$3.2
<b>Total Wellness Tourism Industry</b>	<b>524.4</b>	<b>586.5</b>	<b>\$438.6</b>	<b>\$494.1</b>

Note: Revenue figures may not sum due to rounding.

As in 2012, Europe remains the largest wellness tourism region in terms of trips, while North America is the largest in terms of wellness tourism expenditures. Wellness tourism is growing fastest in Africa, Middle East, and Asia, reflecting overall strong tourism growth; significant investments in hotels, resorts, and tourism infrastructure; along with a growing middle class that supports growth in spas and other wellness offerings in these regions.



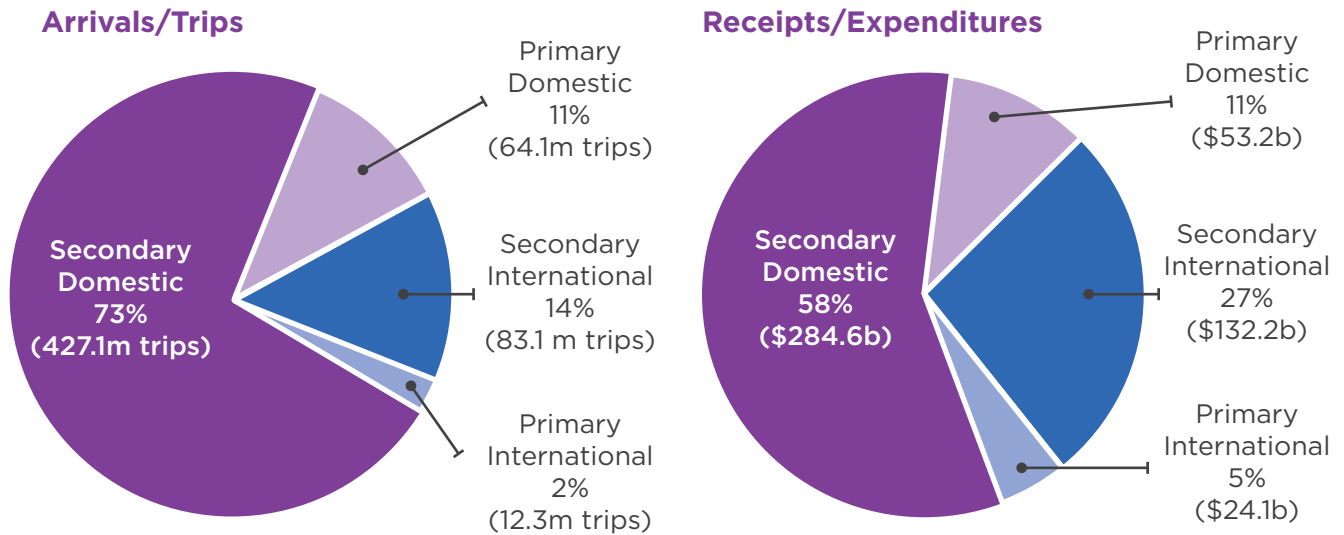
## Top Twenty Wellness Tourism Markets, 2013

	Number of Trips (Millions)	Direct Employment	Expenditures (US\$ billions)	Rank in 2013 (2012 Rank)
United States	148.6	1,836,311	\$180.7	1 (1)
Germany	50.2	490,092	\$46.2	2 (2)
France	25.8	259,295	\$27.2	3 (4)
Japan	36.0	194,606	\$22.2	4 (3)
Austria	12.1	143,779	\$15.7	5 (5)
Canada	23.1	191,423	\$14.8	6 (6)
Italy	6.6	143,237	\$13.3	7 (8)
Switzerland	11.6	101,266	\$12.7	8 (9)
China	30.1	1,037,685	\$12.3	9 (11)
United Kingdom	18.9	163,187	\$12.0	10 (7)
Mexico	12.0	392,043	\$10.5	11 (10)
India	32.7	5,113,703	\$9.2	12 (16)
Thailand	8.3	537,312	\$8.8	13 (14)
Spain	11.3	77,313	\$7.9	14 (12)
South Korea	15.6	121,918	\$5.8	15 (13)
Australia	4.6	55,650	\$5.3	16 (15)
Indonesia	4.0	433,868	\$4.8	17 (41)
Russia	10.3	127,763	\$4.6	18 (17)
Turkey	8.7	57,979	\$4.5	19 (20)
Portugal	3.6	74,446	\$3.4	20 (18)

The top twenty markets account for 85% of global wellness tourism expenditures in 2013. While most of the top twenty countries are in Europe and North America, emerging markets such as China and India are rising quickly in the rankings. The top five countries (United States, Germany, France, Japan and Austria) still represent more than half of global wellness tourism spending, but their share has dropped from 63% in 2012 to 59% in 2013.

Measured in the number of wellness trips, China and India have already joined the ranks of the top five. In terms of expenditures, China moved into the top ten in 2013, and Indonesia joined the top twenty for the first time. Some of the top-ranking countries in terms of wellness tourism growth in 2013 include China, United States, India, Vietnam, Indonesia, Thailand, Turkey, and Morocco. India ranks first for growth in wellness trips, driven by rising interest in Ayurveda and the wealth of Indian wellness traditions, which are being actively marketed by the country.

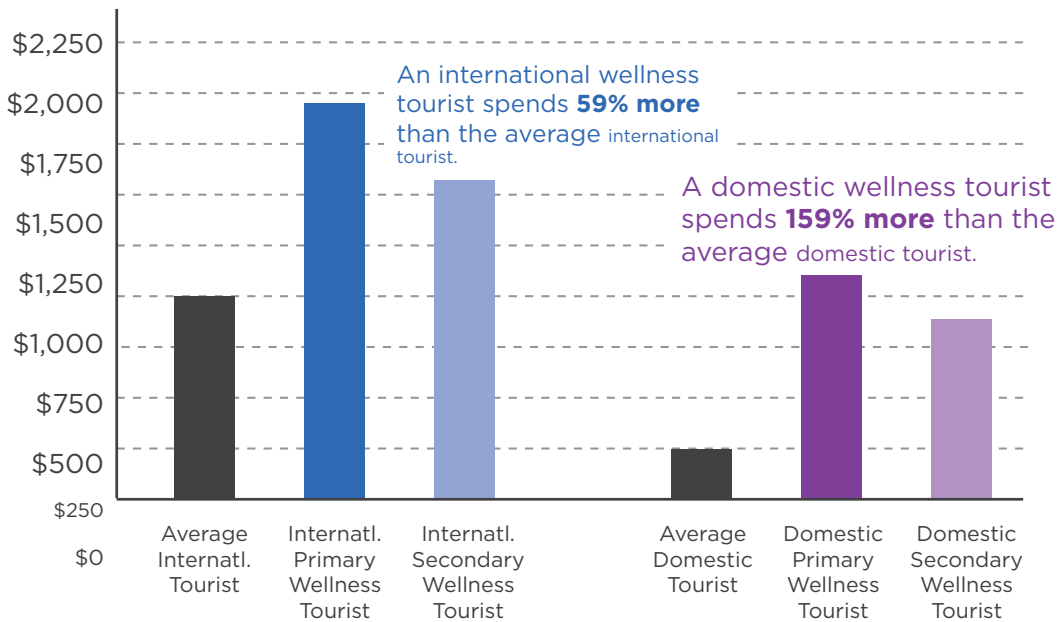
## Types of Wellness Tourism, 2013



Although we tend to picture a wellness traveler as a person who books a one-week retreat at a high-end destination spa, the bulk of wellness travel is done by *secondary wellness travelers*—those who seek wellness experiences as part of their trips, even though wellness was not the primary motivation for their trip or destination. They include the business traveler who chooses a healthy hotel for its on-site yoga classes and healthy menu offerings, or a vacationer who decides to try Thai massage while staying at a resort in Phuket with his family. We estimate that these *secondary wellness travelers* account for 87% of wellness tourism trips and 84% of expenditures in 2013.

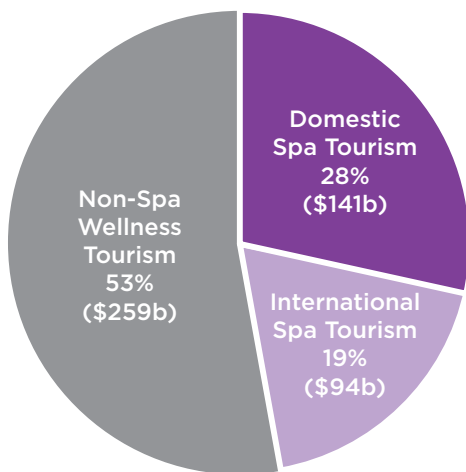
Consistent with what we found previously, *domestic wellness travelers* represent 84% of wellness tourism trips and two-thirds of wellness tourism spending. This is because many more people travel domestically than internationally—especially those living in large countries (e.g., United States, China, India, Russia)—and domestic trips tend to be shorter in duration (such as weekend getaways) and can be done more frequently and less expensively.

## Wellness Tourism Spending (2012)



Wellness travelers continue to be “high-yield” tourists, because they tend to be wealthier and more educated than the typical tourist and may also take longer trips. International wellness tourists spent \$1,639 per trip in 2013, which is 59% higher than the average tourist. The premium for the domestic wellness traveler was even higher, with domestic wellness tourists spending \$688 per trip, 159% higher than the average domestic tourist.

## Spa tourism expenditures represent about 47% of global wellness tourism.



Wellness tourism encompasses many more activities and businesses than just spas. Nonetheless, spas represent a core business within wellness tourism, positioned at the intersection between wellness and tourism. In 2013, we estimate that spa tourism accounted for 306.7 million trips and contributed \$234.7 billion to wellness tourism (an increase of 30% over 2012).

## Economic Impacts of the Wellness Tourism Industry, 2013

	Wellness Tourism Direct Impact	Indirect & Induced Impacts	Wellness Tourism Economy-Wide Impact
Wellness Tourism Expenditures	\$494.1 billion	→	\$1.5 trillion
Employment	14.5 million jobs	→	32.8 million jobs

Wellness tourism's economic 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 2013, the \$494.1 billion in global wellness tourism expenditures generates 14.5 million direct jobs and ***a total economic impact of \$1.5 trillion for the world economy.***

# IV. The Thermal/Mineral Springs Industry

In many countries and regions—from Europe to Japan to the Andes region of Latin America—the modern spa experience is derived from age-old traditions of bathing, rejuvenating, and healing the body and spirit in thermal and mineral waters.

This natural resource is enjoying a resurgence of interest around the world as consumers increasingly seek out authentic, natural, and place-based experiences. In recent years, investments have accelerated to update old facilities and to build new resorts and recreational facilities around thermal/mineral springs. Many countries are now marketing their thermal/mineral springs alongside spas as a major wellness tourism offering.

There are many uses of thermal and mineral spring water: geothermal energy, drinking water, religious/

spiritual, recreation/swimming, wellness, and therapeutic/medical. This study focuses on the *revenue-earning business establishments associated with the wellness, recreational, and therapeutic uses of waters with special properties* (including thermal water, mineral water, and seawater).

For this study, we segment the thermal/mineral springs industry into two groups—establishments that offer spa services (e.g., massage, facials, hydrotherapy, other treatments) alongside their bathing offerings, and those that do not. Different countries and

## Types of Thermal/Mineral Springs Establishments

Primarily Recreational	Primarily Wellness	Primarily Therapeutic or Curative
Thermal/mineral water swimming pool facilities	Thermal/mineral water-based bathing facilities	Health resorts and sanatoria that use thermal mineral waters for treatments
Thermal/mineral water-based waterparks	Thermal/mineral water-based spas	
Hotels/resorts with thermal/mineral water swimming pools	Thalassotherapy spas and resorts	
Thermal or hot spring resorts		

regions tend to offer different types of water-based facilities, depending on their history and traditions. The non-spa businesses typically only offer thermal/mineral water bathing or recreation, such as most of the onsen in Japan, the thermal pools and waterparks that are common in Latin America, and the thermal water swimming pool facilities prevalent in Iceland. The spa-related portion includes the health resorts and sanatoria in Europe that use thermal and mineral waters for treatments, as well as the hot springs resorts common in China and Taiwan.

We estimate that there are 26,847 facilities built around thermal/mineral springs around the world, across 103 countries. These businesses collectively earned more than \$50 billion in revenues in 2013. Only 6,504 of these establishments offer spa-related services. Spa treatments represent a significant value-add on top of bathing and swimming offerings in terms of revenue potential, because, in most countries, thermal/mineral water bathing and swimming facilities tend to have low admission fees and are often traditional or rustic in nature. Therefore, the thermal/mineral springs establishments offering spa services earn significantly higher revenues, accounting for 64% of industry revenues and representing a \$32.0 billion global market.

Thermal/mineral springs industry revenues are heavily concentrated in a small number of countries, especially in Europe and Asia where this industry is more mature. Japan and China together represent 51% of industry revenues, driven by the thousands of onsen in Japan, and ongoing massive investments in hot springs resorts in China. In fact, Japan—with an estimated 13,754 onsen with lodging and 3,899 day-visit onsen—is home to two-thirds of the world’s thermal/mineral springs establishments.

In China, the 560 hot springs resorts currently in operation represent a fixed investment of \$19.5 billion, and 200 more hot springs resorts are slated to open in the next several years, with an additional \$48.9 billion in investment. Investment in hot springs tourism in China has grown by 10% annually from 2010-2013.<sup>1</sup>

Overall, the top ten countries account for 85% of revenues, and the top twenty account for 96%. With its longstanding and mature industry of sanatoria, health resorts, and thermal centers that use balneotherapy for treatment, rehabilitation, and prevention (with significant government support and regulation), most of the top twenty countries are in Europe.

1 Statistics from a speech at the 2014 Spa China Summit by Michael Fu, China Hot Springs Tourism Association, and Chairman, Yunnan YSPA Consultant Ltd.

**Global Thermal/Mineral Springs Industry, 2013**

	Number of Establishments	Revenues (US\$ Billions)	Avg. Revenues per Establishment
With Spa Services	6,504	\$32.0	\$4,922,555
No Spa Services	20,343	\$18.0	\$886,147
<b>Total Thermal/Mineral Springs Industry</b>	<b>26,847</b>	<b>\$50.0</b>	<b>\$1,863,990</b>

Note: The thermal/mineral springs revenue estimates include all revenues earned by these establishments, from bathing/swimming offerings, spa/wellness services and other treatments, other recreational activities, food & beverage, lodging, and other services.

## Thermal/Mineral Springs Facilities by Region, 2013

	Number of Establishments	Revenues (US\$ Billions)
Asia-Pacific	20,298	\$26.75
Europe	5,035	\$21.65
Latin America-Caribbean	961	\$0.87
North America	203	\$0.49
Middle East-North Africa	315	\$0.23
Sub-Saharan Africa	35	\$0.05
<b>Total Industry</b>	<b>26,847</b>	<b>\$50.04</b>

## Top Twenty-Five Thermal/Mineral Springs Markets, 2013

	Number of Establishments	Revenues (US\$ millions)	Rank in 2013
China	2,160	\$14,078.3	1
Japan	17,653	\$11,687.0	2
Germany	1,265	\$7,520.0	3
Russia	776	\$3,688.5	4
Italy	756	\$1,742.7	5
Austria	124	\$928.8	6
Turkey	196	\$862.4	7
Hungary	531	\$691.3	8
Czech Republic	84	\$686.4	9
Spain	165	\$672.0	10
France	175	\$665.5	11
Poland	72	\$576.0	12
Switzerland	61	\$485.8	13
Slovenia	63	\$439.2	14
United States	185	\$395.0	15
Portugal	84	\$376.2	16
Slovakia	81	\$364.8	17
Taiwan	119	\$307.5	18
Romania	70	\$295.0	19
Iceland	135	\$293.0	20
South Korea	96	\$283.4	21
New Zealand	96	\$255.0	22
Brazil	52	\$230.0	23
Mexico	576	\$225.0	24
Serbia	58	\$188.0	25





# V. Other Wellness Lifestyle Industries

In addition to spas, thermal/mineral springs, and wellness tourism, there are many other wellness lifestyle industries that comprise the global wellness cluster.

These include a variety of large industries that help consumers take proactive approaches to integrating wellness into their daily lives – from what they eat to how they exercise and relax, from their homes to their workplaces, and from individual activities to professional services.

We estimate the size of these other wellness lifestyle industries at \$2.8 trillion in 2013.

The seven other wellness lifestyle industries include the following sectors:

**Healthy eating, nutrition, and weight loss:** Includes vitamins and supplements, functional

foods and nutraceuticals, health foods, natural and organic foods, weight-loss and diet services, diet and weight-loss foods and meal services, and anti-obesity prescription and over-the-counter drugs.

**Fitness and mind-body:** Includes gyms and health clubs; personal training; yoga, Pilates, Tai Chi, and other mind-body practices; fitness and exercise clothing; and fitness and exercise equipment.

**Beauty and anti-aging:** Includes beauty and salon services; skin, hair, and nail care services and products; cosmetics, toiletries, and other personal care products; dermatology; prescription pharmaceuticals for skin

## Other Wellness Lifestyle Industries, 2013

Global Market Size*	(US\$ billions)
Healthy Eating, Nutrition, and Weight Loss	\$574.2b
Fitness and Mind-body	\$446.4b
Beauty and Anti-aging	\$1,025.6b
Preventive and Personalized Health	\$432.7b
Complementary and Alternative Medicine	\$186.7b
Workplace Wellness	\$40.7b
Wellness Lifestyle Real Estate	\$100.0b

\*Estimates by SRI International, drawing upon data from Nutrition Business Journal, IHRSA, Markets and Markets, Global Industry Analysts, IBISWorld, Cushman & Wakefield, Kaiser Family Foundation, PWC, WHO, and others.

care; as well as products and services that specifically address age-related health and appearance issues, such as cosmetics/cosmeceuticals for skin/face/body care, hair care/growth, and pharmaceuticals/supplements that treat age-related health conditions.

**Preventive and personalized health:** Includes medical services that focus on treating “well” people, preventing disease, or detecting risk factors—for example, routine physical exams, diagnostic and screening tests, genetic testing, etc. Personalized health uses sophisticated information and data for individual patients (including genetic, molecular, and environmental screening, analysis, and diagnostics; disease management services; electronic health records; and remote patient monitoring) to provide tailored approaches for preventing disease, managing risk factors, or treating conditions.

**Complementary and alternative medicine:** Encompasses diverse medical, health care, holistic, and mentally or spiritually-based systems, practices, and products that are not generally considered to be part of conventional medicine or the dominant health care system—including homeopathic, naturopathic, chiropractic, traditional Chinese medicine, Ayurveda, energy healing, meditation, herbal remedies, etc.

**Workplace wellness:** Includes programs offered by companies and businesses aimed at improving the health and wellness of employees, in order to reduce costs and enhance productivity and performance. These programs raise awareness, provide education, and offer incentives that address specific health risk factors and behaviors (e.g., lack of exercise, poor eating habits, stress, obesity, smoking) and encourage employees to adopt healthier lifestyles.

**Wellness lifestyle real estate:** The construction of residential, hospitality, and mixed-use real estate developments that incorporate wellness facilities and services—including spas, gyms, and other related amenities. Also includes a burgeoning segment of real estate development that focuses on infusing health and wellness factors into the built environment.

# VI. Regional Highlights

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## Asia-Pacific Highlights



### Spa Industry

Asia-Pacific is the top-ranking region in terms of the number of spas and has added more than 10,000 spas since 2007.

**Number of Spas**

32,451 (50% growth since 2007)

**Spa Revenues**

\$18.8 billion (65% growth since 2007)

**Spa Employment**

614,202 (69% growth since 2007)

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### Wellness Tourism

Asia-Pacific is among the world's fastest-growing regions for wellness tourism, adding 34 million new wellness trips in 2013.

**Number of Wellness Trips**

151.9 million (27% growth since 2012)

**Wellness Tourism Expenditures**

\$84.1 billion (21% growth since 2012)

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### Thermal/Mineral Springs

Asia-Pacific ranks first in the world for thermal/mineral springs establishments and revenues, with most located in Japan and China.

**Number of Thermal/Mineral Springs Establishments**

20,298

**Thermal/Mineral Springs Establishment Revenues**

\$26.7 billion

## Asia-Pacific Developments

- Asia-Pacific is the top region ranked by the number of spas (32,451) and ranks second in terms of spa revenues (\$18.8 billion) and spa employment (614,202 employees). Asia-Pacific has registered the highest increase in the number of spas since 2007, adding more than ten thousand spas during this period. The number of hotel/resort spas more than doubled in Asia-Pacific from 2007-2013. This rapid expansion drove robust growth in spa revenues, with an average annual revenue growth rate close to 8.7% over this time period.
- New spa development in Asia has been fueled by openings of luxury hotels and resorts that cater to a rise in intra-Asian tourism. Meanwhile, robust economic growth across the region's economies is driving demand from local consumers in the luxury and middle-income segments. These consumers are increasingly seeking spa treatments as a panacea for their hectic, urban lifestyles. Growing demand for spa services from male consumers is also observed across the region.
- Not surprisingly, China ranks first in Asia-Pacific for its number of spas, commensurate with its expanding middle class and growth in domestic and inbound tourism. In Japan, the spa industry stabilized and began a period of modest expansion, as the country's economy recovered from the global recession and the 2011 earthquake and tsunami. Japan's renewed growth in 2013 was driven by the rise of domestic and inbound tourism (much of the latter from China and other neighboring countries), as consumers took advantage of the lower Yen.
- Hot springs and related resorts, which have always enjoyed wide popularity in Japan, Korea, and Taiwan, have seen an enormous resurgence of interest in China, with new investments in hundreds of large hot spring resorts.
- Overall, the prospect for wellness tourism growth is strong in Asia, building on the rising incomes of the middle class, the increased attention these consumers pay to the preventive aspect of health, the wealth and diversity of wellness traditions that are already embraced by Asian consumers, and the increasingly sophisticated integration of traditional wellness practices and therapies (e.g., Ayurveda, Traditional Chinese Medicine, yoga, Thai massage, etc.) into spas and wellness offerings.

## Top Ten Spa Industry Markets in Asia-Pacific, 2013

	Number of Spas	Spa Revenues (US\$ Millions)	Spa Employment
Japan	6,958	\$5,950.0	113,397
China	9,452	\$4,695.5	225,341
South Korea	2,805	\$1,380.6	36,751
India	3,956	\$1,147.4	47,666
Thailand	2,088	\$929.1	66,816
Indonesia	1,668	\$832.8	51,343
Australia	968	\$817.8	10,292
Hong Kong	693	\$589.2	12,295
Taiwan	838	\$495.0	11,090
Singapore	682	\$485.2	7,649

## Top Ten Wellness Tourism Markets in Asia-Pacific, 2013

	Number of Trips (Millions)	Receipts/Expenditures (US\$ Millions)
Japan	36.0	\$22,159.5
China	30.1	\$12,278.1
India	32.7	\$9,161.8
Thailand	8.3	\$8,823.9
South Korea	15.6	\$5,836.4
Australia	4.6	\$5,275.2
Indonesia	4.0	\$4,846.5
Hong Kong	1.7	\$2,308.7
Malaysia	3.7	\$2,223.1
Taiwan	2.8	\$1,957.8

## Top Ten Thermal/Mineral Springs Markets in Asia-Pacific, 2013

	Number of Establishments	Revenues (US\$ Millions)
China	2,160	\$14,078.3
Japan	17,653	\$11,687.0
Taiwan	119	\$307.5
South Korea	96	\$283.4
New Zealand	96	\$255.0
Australia	23	\$61.5
Philippines	30	\$24.0
Thailand	15	\$11.5
Vietnam	18	\$10.0
Malaysia	12	\$6.0

# Europe Highlights



## Spa Industry

Europe’s well-developed spa and wellness market ranks first in the world for spa revenues and spa employment.

**Number of Spas**  
32,190 (42% growth since 2007)

**Spa Revenues**  
\$29.8 billion (62% growth since 2007)

**Spa Employment**  
678,920 (54% growth since 2007)

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## Wellness Tourism

Europe is the world’s largest market for wellness trips and second largest in terms of wellness tourism expenditures.

**Number of Wellness Trips**  
216.2 million (7% growth since 2012)

**Wellness Tourism Expenditures**  
\$178.1 billion (12% growth since 2012)

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## Thermal/Mineral Springs

European countries are among the oldest and most developed markets for thermal/mineral springs-based facilities and treatments.

**Number of Thermal/Mineral Springs Establishments**  
5,035

**Thermal/Mineral Springs Establishment Revenues**  
\$21.7 billion

## Europe Developments

- Europe continues to be the top global spa market, measured in spa revenues. With a large and wellness-savvy consumer base, Europe has added over 9,500 spas since 2007. Spa revenues grew by nearly \$11.5 billion since 2007, reaching \$29.8 billion in 2013 (representing an 8.4% average annual growth rate).
- Russia is among the biggest growth stories in Europe, adding more than 1,000 spas and nearly quadrupling spa revenues since 2007. An expanding middle/upper-income consumer base for the day spa market and an increased demand for luxury hotel and resort spas are behind this expansion. Not only are Russian consumers driving the growth of spas within Russia, Russian travelers have also been boosting demand for hotel and resort spas in a number European markets, particularly in the Baltic and Eastern European countries.
- The mature spa markets in Western European countries experienced healthy growth, despite a generally slow economic growth environment. The day spa market is particularly active, with the proliferation of more differentiated and specialized urban spas and boutique hotel spas that cater to consumers seeking to maintain health and reduce effects of stress and aging, at a variety of price points and settings.
- Elsewhere in Eastern Europe and Central Asia, booming energy economies have led to new projects and rising investor interest in the hospitality and spa markets in countries such as Kazakhstan, Uzbekistan, Azerbaijan, and others. While these markets are growing from a small base of local consumers and international tourists, many new hotel and resort spas are coming on the horizon.
- Countries such as Germany, Austria, Switzerland, Italy, and most of Eastern Europe and the Baltics have centuries-old traditions of traveling for Kur, which involves a variety curative, rehabilitative, and preventive therapies related to balneotherapy, massage, mud, and algae treatments, giving rise to a large sector of sanatoria, health resorts, and thermal centers. As this traditional sector goes through shrinkage and restructuring, some facilities are being refurbished, remodeled, and repositioned for the modern wellness tourism market, providing spa and holistic health services in a hospitality setting that caters to consumers seeking to maintain and enhance their health.

## Top Ten Spa Industry Markets in Europe, 2013

	Number of Spas	Spa Revenues (US\$ Millions)	Spa Employment
Germany	5,575	\$5,973.8	126,481
France	3,556	\$3,117.6	70,232
Russia	2,728	\$2,909.1	101,373
Italy	2,679	\$2,756.0	61,398
United Kingdom	2,964	\$2,512.0	52,908
Spain	2,432	\$2,144.9	45,381
Austria	1,200	\$1,648.9	29,507
Switzerland	687	\$1,138.6	17,925
Poland	979	\$719.0	17,460
Netherlands	707	\$606.1	11,690

## Top Ten Wellness Tourism Markets in Europe, 2013

	Number of Trips (Millions)	Receipts/Expenditures (US\$ Millions)
Germany	50.2	\$46,243.0
France	25.8	\$27,177.5
Austria	12.1	\$15,714.3
Italy	6.6	\$13,342.5
Switzerland	11.6	\$12,693.5
United Kingdom	18.9	\$11,984.5
Spain	11.3	\$7,919.9
Russia	10.3	\$4,572.3
Turkey	8.7	\$4,516.4
Portugal	3.6	\$3,441.7

## Top Ten Thermal/Mineral Springs Markets in Europe, 2013

	Number of Establishments	Revenues (US\$ Millions)
Germany	1,265	\$7,520.0
Russia	776	\$3,688.5
Italy	756	\$1,742.7
Austria	124	\$928.8
Turkey	196	\$862.4
Hungary	531	\$691.3
Czech Republic	84	\$686.4
Spain	165	\$672.0
France	175	\$665.5
Poland	72	\$576.0



# North America Highlights



## Spa Industry

North America's spa industry has recovered well from the recession and is experiencing strong growth trends.

**Number of Spas**  
26,510 (28% growth since 2007)

**Spa Revenues**  
\$18.3 billion (35% growth since 2007)

**Spa Employment**  
397,381 (29% growth since 2007)

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## Wellness Tourism

North America remains the world's largest region for wellness tourism expenditures and second largest for wellness trips.

**Number of Wellness Trips**  
171.7 million (5% growth since 2012)

**Wellness Tourism Expenditures**  
\$195.5 billion (8% growth since 2012)

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## Thermal/Mineral Springs

North America ranks fourth in the world for thermal/mineral springs-based revenues.

**Number of Thermal/Mineral Springs Establishments**  
203

**Thermal/Mineral Springs Establishment Revenues**  
\$0.5 billion

## North America Developments

- North America continues to rank second in terms of spa revenues and third in the number of spas. Led by the United States, North America has added more than 5,800 spas and 90,000 spa jobs since 2007. Most of this growth is in the day/club spa category. Although this sector has been considered mature and saturated for some time, new lower-price and franchised spa models are especially driving the ongoing rise in spa openings. The hotel/resort spas category has grown more modestly, with investors focusing more on renovations and refurbishments of existing properties.
- Following the recession that began in 2008, for several years the U.S. market was characterized by discounting and low profitability, and the industry has since undergone a significant transformation. In particular, the growth of spa franchises, with Massage Envy at the forefront, has democratized the spa experience and increased accessibility for middle- and upper-middle income consumers. The proliferation of pop-up stations at shopping malls, as well as neighborhood reflexology and massage clinics, are also expanding accessibility. Marketing of these establishments, typically run by a sole proprietor, has been aided by aggressive use of social media.
- Increased supply of spas in North America stimulates demand in a virtuous cycle, encouraging more consumers to self-identify as spa-goers at a variety of price points. More than ever, middle-class customers can afford spa treatments at an inexpensive price and on a regular basis, and are thereby incorporating spa-going into their daily lifestyles. In North America, spas are no longer perceived as the exclusive domain of the wealthy: massages are viewed increasingly as a treatment for stress reduction, facials as essential in improving skin health, and reflexology as regular health maintenance.
- It is likely that traditional spas will increasingly compete with single service establishments (e.g., massage and facial clinics) for speed, convenience, and value, while being pressed to add services to attract customers looking for one-stop service. Additional competitive pressures will come from outside the spa industry, as salons, gyms and fitness centers, doctors' offices, and hospitals add massage and other spa services to complement their standard offerings. This competition will not necessarily take business away from traditional spas, but rather will continue to expand the consumer base and demand for wellness offerings.

### Spa Industry Markets in North America, 2013

	Number of Spas	Spa Revenues (US\$ Millions)	Spa Employment
United States	22,852	\$16,254.4	354,610
Canada	3,658	\$2,043.4	42,771

### Wellness Tourism Markets in North America, 2013

	Number of Trips (Millions)	Receipts/Expenditures (US\$ Millions)
United States	148.6	\$180,741
Canada	23.1	\$14,774

### Thermal/Mineral Springs Markets in North America, 2013

	Number of Establishments	Revenues (US\$ Millions)
United States	185	\$395
Canada	18	\$96

# Latin America-Caribbean Highlights



## Spa Industry

Latin America’s spa market benefits from strong tourism and consumer spending, with many countries experiencing double-digit annual growth rates.

**Number of Spas**  
9,007 (66% growth since 2007)

**Spa Revenues**  
\$4.7 billion (86% growth since 2007)

**Spa Employment**  
141,025 (71% growth since 2007)

---



## Wellness Tourism

In 2013, wellness trips grew three times faster than overall tourism trips growth in Latin America-Caribbean.

**Number of Wellness Trips**  
35.5 million (12% growth since 2012)

**Wellness Tourism Expenditures**  
\$25.9 billion (16% growth since 2012)

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## Thermal/Mineral Springs

Traditionally used for recreation, Latin-America’s wealth of springs are experiencing a resurgence of popularity and development.

**Number of Thermal/Mineral Springs Establishments**  
961

**Thermal/Mineral Springs Establishment Revenues**  
\$0.9 billion

## Latin America-Caribbean Developments

- Latin American and the Caribbean have experienced strong spa industry growth, adding more than 3,500 spas since 2007, and almost doubling spa employment during this period.
- Mexico, Brazil, Argentina, Costa Rica, and Colombia have the fastest growing markets, with Brazil overtaking Argentina to rank second in the region (after Mexico) in terms of spa revenues.
- Reflecting a strong culture and tradition focused on beauty, Latin America is home to thousands of aesthetic clinics and salons. In recent years, many of these establishments have begun to add spa treatments as a way to diversify revenue sources while being responsive to customer needs. This has accelerated the convergence of the day spa, aesthetic clinic, and salon markets, especially in Brazil, Mexico, Argentina, Colombia, Venezuela, and Chile.
- In Mexico and many Caribbean countries, the spa market continues to be dominated by the hotel and resort spa sector. The steady rise of the middle class and inbound tourism growth will continue to drive demand for all categories of spas in these countries.
- The region's extensive local and natural assets – including sun and sea in the Caribbean and coastal regions, biodiversity, diverse topography, indigenous cultures, and historical structures – will be increasingly leveraged by entrepreneurs to develop spas that fuse unique settings, local traditions, and location-specific offerings with world-class built environments and services.
- The Andes region is home to a wealth of natural thermal waters, which have given rise to large industry of thermal establishments that largely serve a local and regional clientele. These establishments have traditionally been recreational in nature, and they include extensive thermal waterparks and swimming pools in Brazil, Argentina, and Chile; higher-end hot springs resorts in Costa Rica, Uruguay, and Venezuela; and hundreds of baños termales and balnearios in other countries such as Peru and Mexico. The massive thermal resources in this region offer a new frontier for investments in upgrading older facilities and building new facilities that fuse spa and wellness with traditional bathing and recreational offerings.

## Top Ten Spa Industry Markets in Latin America-Caribbean, 2013

	Number of Spas	Spa Revenues (US\$ Millions)	Spa Employment
Mexico	2,765	\$1,364.5	44,839
Brazil	1,325	\$623.0	17,350
Argentina	1,803	\$560.4	22,958
Colombia	527	\$311.0	8,293
Costa Rica	249	\$267.2	5,784
Venezuela	228	\$161.5	3,557
Chile	238	\$150.1	3,726
Jamaica	140	\$102.3	2,603
Uruguay	110	\$98.8	2,878
Dominican Republic	190	\$96.1	3,010

## Top Ten Wellness Tourism Markets in Latin America-Caribbean, 2013

	Number of Trips (Millions)	Receipts/Expenditures (US\$ Millions)
Mexico	12.0	\$10,465.3
Brazil	5.9	\$2,547.1
Argentina	2.3	\$1,440.5
Dominican Republic	1.0	\$1,128.7
Chile	3.0	\$1,028.8
Costa Rica	0.7	\$956.4
Colombia	1.1	\$795.9
Jamaica	0.6	\$716.9
Venezuela	1.3	\$650.0
Puerto Rico	0.8	\$638.8

## Top Ten Thermal/Mineral Springs Markets in Latin America-Caribbean, 2013

	Number of Establishments	Revenues (US\$ Millions)
Brazil	52	\$230.0
Mexico	576	\$225.0
Argentina	75	\$102.0
Costa Rica	26	\$87.0
Chile	62	\$82.0
Uruguay	18	\$39.5
Peru	38	\$31.5
Venezuela	9	\$31.5
Colombia	25	\$16.3
Ecuador	17	\$8.3

# Middle East-North Africa Highlights



## Spa Industry

The number of spas in Middle East-North Africa more than tripled from 2007 to 2013.

**Number of Spas**  
3,889 (284% growth since 2007)

**Spa Revenues**  
\$1.7 billion (134% growth since 2007)

**Spa Employment**  
57,308 (174% growth since 2007)

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## Wellness Tourism

Middle East-North Africa was the second fastest-growing region for wellness tourism in 2013.

**Number of Wellness Trips**  
7.0 million (48% growth since 2012)

**Wellness Tourism Expenditures**  
\$7.3 billion (39% growth since 2012)

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## Thermal/Mineral Springs

Most springs-based establishments in Middle East-North Africa are small, traditional, and primarily serve a local population.

**Number of Thermal/Mineral Springs Establishments**  
315

**Thermal/Mineral Springs Establishment Revenues**  
\$0.2 billion

## Middle East-North Africa Developments

- Middle East & North Africa is the second fastest growing region in the world for spas, more than doubling the industry size between 2007 and 2013. Much of this growth is concentrated in the Gulf and North African countries that experienced rapid economic growth in a stable political environment. Countries with the largest spa growth since 2007 include Morocco, the United Arab Emirates (especially Dubai), Saudi Arabia, and Israel.
- Consumers in the Middle East have long associated spas with relaxation and pampering. Rising incomes, population growth, and increased tourism inflows in the Gulf countries have continued to drive the growth of day spas and hotel spas, many of which also target the luxury local consumer segments. The region has added many hotels and resorts in recent years, catering to key tourism markets of Europeans (especially Russians), wealthy Asians, Gulf visitors (especially Saudi Arabia), and business travelers. Extensive spa and fitness facilities are now standard and expected amenities in high-end hotel/resort and real estate developments.
- The region has a long tradition of bathing associated with the hammams/Turkish baths. While most of these facilities cater to local customers, some of the historical facilities are being modernized into spa-like destinations that also serve tourist markets, and hammam bathing traditions are being integrated into spa services. Morocco's spa market has experienced the fastest growth in the region, leveraging a local consumer base, deep hammam traditions, and a strong tourism industry with rapid growth in international arrivals (especially from Europe).
- There is significant untapped potential in thermal water-based offerings in the Middle East & North Africa. Outside of a few large and well-developed locations in Israel and Jordan, most of the region's hot springs bathing establishments are small, traditional, and unknown beyond the local markets. Countries such as Tunisia, Algeria, Morocco, and Iran have extensive natural thermal resources that offer strong potential for spa and resort developments to attract both local and international tourist markets, especially as the geopolitical climate improves. Tunisia's thermal sector is the most developed in the region and is supervised through the government's Office du Thermalisme (established in 1975). In Morocco a major investment is currently underway to develop a modern spa resort at its major thermal station, Moulay Yacoub.



## Top Ten Spa Industry Markets in Middle East-N. Africa, 2013

	Number of Spas	Spa Revenues (US\$ Millions)	Spa Employment
United Arab Emirates	566	\$581.6	18,251
Morocco	1,699	\$253.1	13,317
Israel	336	\$203.4	4,856
Saudi Arabia	271	\$180.6	5,092
Tunisia	176	\$95.4	2,817
Qatar	54	\$70.7	1,683
Kuwait	76	\$68.4	1,722
Egypt	318	\$65.2	3,219
Oman	40	\$63.5	1,007
Bahrain	42	\$52.3	1,261

## Top Ten Wellness Tourism Markets in Middle East-N. Africa, 2013

	Number of Trips (Millions)	Receipts/Expenditures (US\$ Millions)
United Arab Emirates	1.2	\$2,249.3
Morocco	2.2	\$1,748.2
Israel	0.8	\$1,052.6
Tunisia	0.8	\$429.1
Jordan	0.4	\$337.9
Egypt	0.4	\$309.5
Saudi Arabia	0.3	\$223.0
Oman	0.1	\$208.2
Bahrain	0.2	\$180.9
Qatar	0.1	\$180.6

## Top Six Thermal/Mineral Springs Markets in Middle East-N. Africa, 2013

	Number of Establishments	Revenues (US\$ Millions)
Tunisia	67	\$60.0
Israel	5	\$57.0
Algeria	163	\$36.0
Iran	46	\$31.6
Jordan	4	\$15.0
Morocco	11	\$14.0

# Sub-Saharan Africa Highlights



## Spa Industry

Today, 42 countries in Sub-Saharan Africa have spas, as compared to only 14 countries with spas in 2007.

### Number of Spas

1,544 (297% growth since 2007)

### Spa Revenues

\$0.8 billion (186% growth since 2007)

### Spa Employment

20,822 (186% growth since 2007)

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## Wellness Tourism

Sub-Saharan Africa experienced the highest percentage growth in wellness tourism in 2013, with wellness trips nearly doubling.

### Number of Wellness Trips

4.2 million (90% growth since 2012)

### Wellness Tourism Expenditures

\$3.2 billion (57% growth since 2012)

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## Thermal/Mineral Springs

While Sub-Saharan Africa has a wealth of thermal/mineral springs, South Africa is the only well-developed commercial market.

### Number of Thermal/Mineral Springs Establishments

35

### Thermal/Mineral Springs Establishment Revenues

\$0.05 billion

## Sub-Saharan Africa Developments

- Sub-Saharan Africa's spa industry has posted the fastest growth rates in the world since 2007. Starting from a low base, the number of spas in Africa quadrupled to 1,544 in 2013, driven by economic growth and increased tourism traffic to the region.
- While our 2007 study on the global spa industry counted only 14 African countries with modern spas, there are now spas in 42 African markets, a change that is largely driven by hotel investments and new openings across many countries, including Nigeria, Senegal, Gambia, Rwanda, Ethiopia, and many others.
- Robust economic growth and an increasing middle class with an interest in relaxation, beauty treatments, and health maintenance have supported a rapid expansion of the day spa market, particularly in high-growth economies such as South Africa, Ghana, and Nigeria.
- Strong tourism growth and new hotel/resort investments have similarly driven rapid growth in the hotel/resort spa segment in countries such as Kenya, Namibia, Tanzania, Uganda, Botswana, Mauritius, and Seychelles.
- In most of Africa, the modern concepts of wellness and spa are still new and developing – although all African countries have a wealth of traditional wellness and healing practices that are part of people's daily lives. Wellness tourism is concentrated in a few regions and is dominated by international tourists and a very small elite class of African consumers. Still a small niche market, wellness tourism is often linked to safari and adventure tourism. Luxury game reserves and safari camps in South Africa, Kenya, Namibia, Botswana, and Tanzania typically offer spa and wellness facilities that incorporate natural and cultural African elements.
- South Africa is the only country in Africa with a well-developed sector of thermal water-based establishments. Most of the country's hot springs resorts offer recreational bathing and primitive camping and cabin-type lodging, and very few have developed spa and wellness services alongside the bathing offerings.

## Top Ten Spa Industry Markets in Sub-Saharan Africa, 2013

	Number of Spas	Spa Revenues (US\$ Millions)	Spa Employment
South Africa	599	\$471.0	12,387
Kenya	107	\$51.1	1,157
Seychelles	43	\$44.6	570
Nigeria	151	\$32.6	1,155
Tanzania	72	\$32.2	639
Mauritius	62	\$27.8	675
Namibia	40	\$16.3	553
Botswana	33	\$13.7	452
Ghana	44	\$12.1	370
Madagascar	27	\$11.2	250

## Top Ten Wellness Tourism Markets in Sub-Saharan Africa, 2013

	Number of Trips (Millions)	Receipts/Expenditures (US\$ Millions)
South Africa	2.4	\$1,819.2
Kenya	0.3	\$260.2
Mauritius	0.1	\$181.8
Seychelles	0.1	\$170.8
Tanzania	0.1	\$156.5
Nigeria	0.1	\$69.3
Botswana	0.2	\$61.4
Namibia	0.1	\$55.4
Madagascar	0.1	\$44.9
Zimbabwe	0.1	\$43.4

## Top Two Thermal/Mineral Springs Markets in Sub-Saharan Africa, 2013

	Number of Establishments	Revenues (US\$ Millions)
South Africa	30	\$48.0
Namibia	2	\$3.7

# VII. Looking Forward

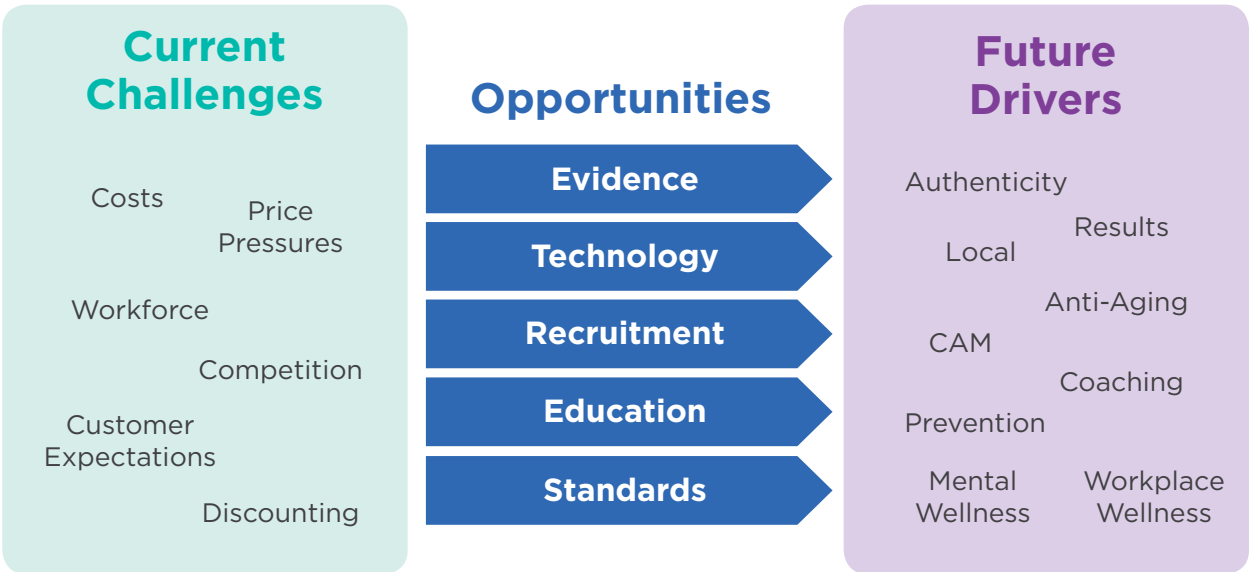
To collect information for this study, we have conducted extensive research, held conversations with dozens of industry leaders, and gathered information and opinions from over 1,000 industry members through a global industry survey. This research confirmed that there is great optimism about the future of the global spa and wellness industry, as global trends and future drivers assure an ever-growing market for wellness. In particular, businesses see strong opportunities in anti-aging and results-based services, mental wellness offerings, prevention, coaching, new technologies, and many other areas.

However, industry stakeholders have also been consistent in pointing out several challenges, which include workforce, the competitive and discounting environment, and rising costs.

Looking to the future, there are many opportunities for the spa and wellness industry collectively to keep the playing field vibrant and dynamic and to sustain future growth and competitiveness.

**Collect and communicate evidence.** Wellness consumers are not only growing in numbers but are also becoming more experienced. Increasingly, they demand quality, value, and results. This extends from spa therapies to holistic health. It is important to collect and disseminate scientific evidence about the results of different spa modalities and wellness offerings and also to educate consumers and medical professionals. The *Wellness Evidence* project spearheaded by the Global Spa & Wellness Summit (GSWS) has become an important asset in this regard. In addition, evidence that shows investment

## Spa & Wellness Economy: Looking to the Future...



returns from a specific wellness practice or offering—from improved health outcomes to higher cost-effectiveness—will be powerful for promoting the overall shift of medical spending dollars toward prevention, wellness, and proactive approaches.

**Harness technology.** Technology has introduced new treatments, new gadgets and products, new marketing techniques, and new ways to optimize business operations. Some are gimmicky, and many applications and devices are still compartmentalized; yet, technology will increasingly influence how consumers make purchasing decisions and how businesses create value for customers. As technology increases customer expectations for convenience, value, just-in-time information, and even a community of like-minded people—especially among younger consumers—businesses will need to harness technology to provide greater transparency of their offerings and their results, as well as to build meaningful connections with their customers.

**Invest in human resources.** Spa is a service industry, and people are its biggest asset. The spa industry's growth trajectory will require a strong pipeline of well-trained people to enter spa careers and move up the professional ladder. The spa management workforce forum pioneered by GSWS has made great strides to draw attention to, and address the need for, training spa managers. Similar initiatives could also be considered on the spa therapist side to ensure a strong pipeline of therapists around the world.

**Ensure high standards.** As more and more businesses self-identify as spas, questions inevitably arise as to what constitute the minimal requirements to be called a “spa.” In some countries, there have been calls for the establishment of industry standards and regulations. High standards give customers confidence and create professionalism within the industry. While it may not be productive to establish standards in a formal, regulatory sense, global guidelines that are based on best practices would be beneficial for all spas and related establishments. Since the global spa industry is diverse and varied in its regional forms and origins,

such standards and guidelines will need to be sensitive to the local industry context. This industry-level guidance could encompass terminologies, professional standards, expected service levels, facility design, and operations. One example of a way to help ensure high standards is the newly developed 2014 *Guide to Hydrothermal Spa Development Standards* sponsored by GSWS. Incorporating consumer feedback will also help the industry to align its standards to market demand and customer expectations.

**Shape the growth of a diverse, inclusive spa and wellness cluster.** Industry clustering is a popular economic concept, whereby businesses work collaboratively to improve the competitiveness of their industry, typically within a region or country. Via GSWS, spa and wellness industry stakeholders have applied the cluster concept at a global level, pioneering new ground. This kind of collaboration has made possible global initiatives that benefit the industry overall, including the evolution of the spa industry toward a focus on wellness, wellness tourism, and related segments such as thermal/mineral springs. Going forward, this collaboration will support spa and wellness businesses in shaping the kind of growth that will happen; the future character of the industry; and the impact of this high-growth industry on consumers, economies, global health, and the environment.

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Better understanding global market economies is key to customizing and adapting Biologique Recherche's treatments to client trends and needs. Biologique Recherche's presence in more than 60 countries requires us to closely monitor the industry clusters. We are proud to actively support GSWS research activities and the *Global Wellness Economy Monitor*. It allows us to offer a unique and hyper personalized approach to each client experiencing Biologique Recherche treatments.

– Rupert Schmid, Chairman and Partner, Pierre-Louis Delapalme, CEO and Partner



Wellness is the fastest growing industry in the world and arguably the most important. By infusing wellness into real estate and specifically into hotels through our Stay Well program, we have seen firsthand the acute demand and premiums that travelers are willing to pay for a wellness experience. Delos™ commends the work of other thought-leaders in the industry, such as the Global Spa & Wellness Summit, that are working towards capturing more concrete data surrounding wellness demand, trends and growth, and sharing this information more widely.

– Paul Scialla, Founder & CEO



ESPA is proud to partner with the Global Spa & Wellness Summit on this important and impactful research study. As a global leader in spa, ESPA combines the design and management of prestigious spas across five continents with the creation of pioneering, natural products rich in heritage, texture and aroma. Our commitment to tracking industry trends supports ESPA's rich spa heritage and our unique brand.

– ESPA

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Jhāna, Healing, Mindfulness and Yoga Center, strongly supports the research of the GSWS. We invite the industry to see past revenues and look at the transformation that is required from the inside out. How can we give to others seeking calm and relaxation within the walls of our business if we are not providing healthy work places and if our staff is not authentically living a preventative and mindful life? What is the real quality of the service we are providing? What is that we are teaching and spreading? What is the gift we are truly giving to our clients?

– Felix Lopez, Spiritual Leader, Energy Healer, Mindfulness and Meditation Teacher



With over 1,000 day spa locations in the United States, Massage Envy Spa® is passionate about promoting the therapeutic benefits of massage therapy and skincare services to our members and guests. We are proud to partner with the Global Spa & Wellness Summit and support its research initiatives. Global spa research reports like the Economy Monitor give all of us critical insight that will support us in growing and sustaining the spa and wellness industry through the next decade.

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



Spa and wellness practitioners play a vital role in improving global health and wellbeing, and they comprise a substantial portion of our subscriber network. We believe there is a natural synergy between spa and wellness and other burgeoning mind-body practices like yoga, Zumba, Barre, Crossfit and indoor cycling. We're honored to support more extensive research on the spa and wellness markets, and we're looking forward to both deepening our understanding of these markets, and enhancing our web and mobile business management technologies to meet its rapidly evolving needs.

– Rick Stollmeyer, CEO and Co-Founder

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It has been said that it is a capital mistake to theorize before one has data. Natura Bissé is proud to sponsor the *Global Spa & Wellness Economy Monitor* so that industry leaders can analyze such data and convert it into knowledge, which will not only help them individually but will help us all as an industry. We are thankful to the GSWS for being the conduit that lets us sponsor such a great initiative.

– Jose Villegas, COO and Joaquin Serra, Senior Executive  
Vice President



Noel Asmar Group is proud to sponsor the *Global Wellness Economy Monitor*. We live in the information age, where people are tracking their own health and using online tools to stay healthy, while at the same time, large companies are tracking industry trends to stay competitive. Access to useful analysis is key to operating a successful business in the ever-changing world of health and wellness. GSWS research digests industry metrics, and produces valuable analytics that allow a business within the wellness spectrum to make good—and timely—business decisions, based on the state of the industry today, as well as trends that predict where the industry is going tomorrow.

– Noel Asmar, Founder & CEO



At Performance Health®, we are committed to research on many levels. We applaud the Global Spa & Wellness Summit for its research investments that we know will make a positive impact and shape a future that will benefit us all.

– Lynda Solien-Wolfe, Vice President, Massage & Spa

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The importance of good industry benchmarking data simply cannot be underestimated, and given the pace at which the spa and wellness industries evolve, fresh numbers and analyses are always needed. We're constantly seeking the best sources of global data for our business—and the thousands of businesses we support in the marketplace—and we simply wouldn't have it without the work of the GSWS.

– Mia Kyricos, Chief Brand Officer



Innovation and customer experience has always been the top priority at The BodyHoliday. And therefore it's crucial for the resort development to gather, evaluate and implement results from quality industry research papers. Therefore, it was clear that the team of experts at GSWS will provide us with the very best and comprehensive research in the field of Health and Wellbeing.

– Andrew Barnard, Deputy Managing Director



Just last year, WTS International had the honor to support the GSWS on its efforts to bring carefully-researched and realistic wellness data to a global audience. We believe that it's our collective duty to provide credibility and open information about an industry that is founded on giving individuals and communities access to a better quality of life. WTS and its entire global team practice this belief, every day. We are proud and thankful to be part of this endeavor and an active member of the Global Wellness Tribe!

– Alfredo Carvajal, Chief Operating Officer



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