

# Global Wellness Tourism Economy: North America

NOVEMBER 2018



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Global Wellness  
Tourism Economy

# Executive Summary

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# ABOUT THE AUTHORS

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## ABOUT THE GLOBAL WELLNESS INSTITUTE

The Global Wellness Institute (GWI), a 501(c)(3) non-profit organization, is considered the leading global research and educational resource for the global wellness industry and is known for introducing major industry initiatives and regional events that bring together leaders and visionaries to chart the future. 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. Its mission is to empower wellness worldwide.

[www.globalwellnessinstitute.org](http://www.globalwellnessinstitute.org)

## ABOUT THE AUTHORS

The *Global Wellness Tourism Economy* report was prepared by Ophelia Yeung and Katherine Johnston, Senior Research Fellows at the Global Wellness Institute. Together, they have four decades of experience leading research and strategy development for businesses, universities, research institutions, and multilateral and government organizations under the auspices of SRI International, a Silicon Valley-based technology and innovation company. Since 2008, Ms. Yeung and Ms. Johnston have worked with the team at what has become the Global Wellness Institute to pioneer groundbreaking research on the global wellness economy and its subsectors. They were assisted in this research by Tonia Callender, GWI Research Fellow.

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# EXECUTIVE SUMMARY

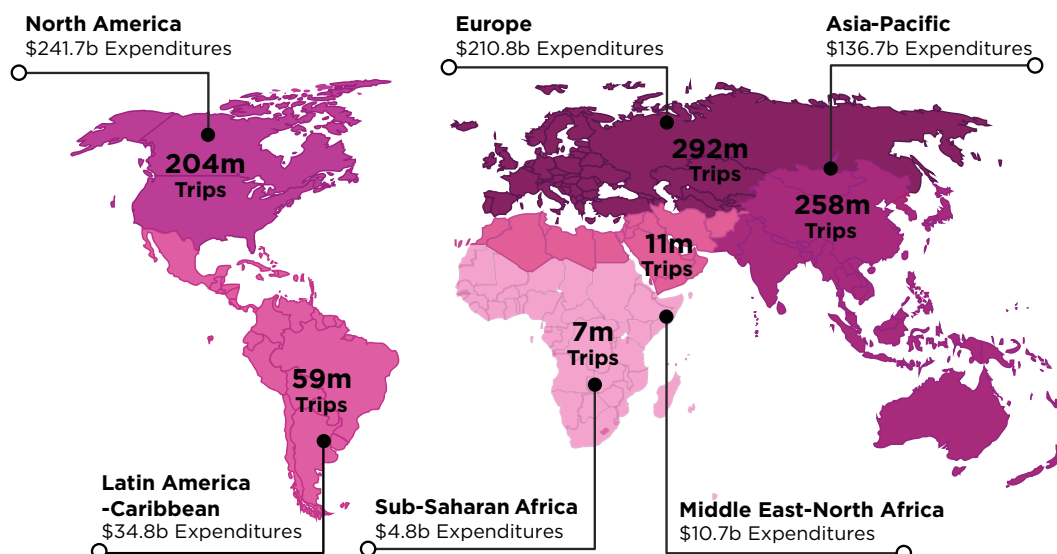
Wellness tourism is travel associated with the pursuit of maintaining or enhancing one's personal wellbeing. GWI estimates wellness tourism is a \$639 billion global market in 2017, growing more than twice as fast as general tourism.

In 2013, the Global Wellness Institute (GWI) unveiled the inaugural edition of the Global Wellness Tourism Economy report — a landmark study that defined the parameters and characteristics of the emerging wellness tourism sector, estimated its global size, and highlighted its far reaching economic impacts. Since then, this tourism segment has accelerated around the world. This updated Global Wellness Tourism Economy report revisits the framework and definition presented in the inaugural report and provides new data and insights on global, regional, and country-level developments.

Estimated at \$639.4 billion in 2017, wellness tourism is a fast-growing tourism segment that has been growing by 6.5% annually from 2015-2017 (more than twice the growth rate for general tourism). Travelers made 830 million wellness trips in 2017, which is 139 million more than in 2015. Growth has been driven by an expanding global middle class, growing consumer desire to adopt a wellness lifestyle, rising interest in experiential travel, and increasing affordability of flights and travel options. Across regions, Europe remains the destination for the largest number of wellness trips, while North America leads in wellness tourism expenditures. Asia has made the most gains in the number of wellness trips and wellness tourism expenditures, with demand stimulated by strong economies and an expanding middle class.

## Wellness Tourism by Region, 2017

Number of wellness tourism trips and expenditures (inbound and domestic)



Source: Global Wellness Institute

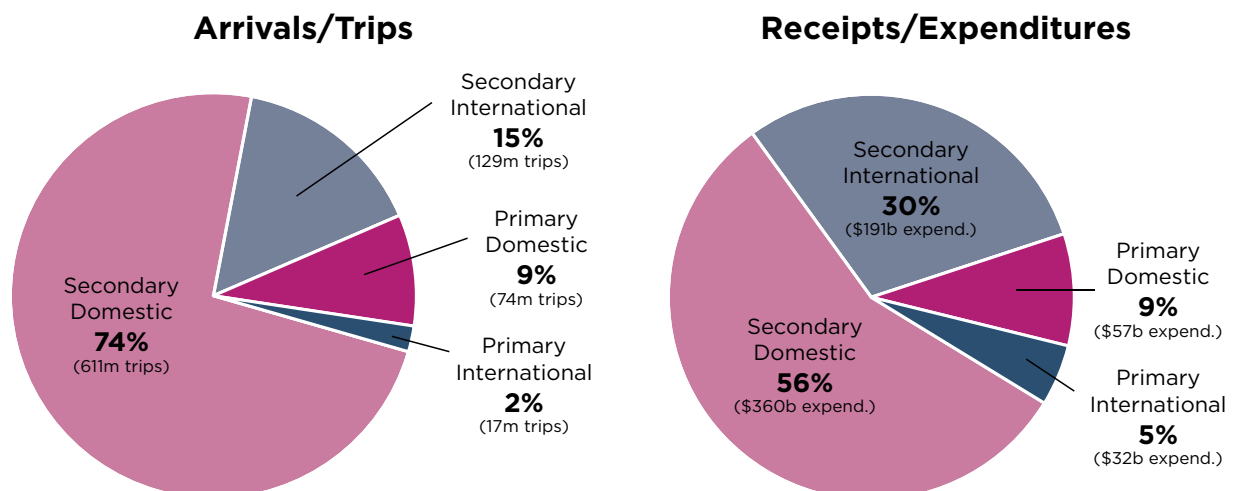
## Secondary wellness travelers account for the bulk of wellness tourism trips and growth: 89% of trips and 86% of expenditures.

The wellness tourism market includes two types of travelers: **primary wellness travelers**, who are motivated by wellness to take a trip or choose their destination based on its wellness offerings (e.g., someone visiting a wellness resort or participating in a yoga retreat); and **secondary wellness travelers**, who seek to maintain wellness or engage in wellness activities during any kind of travel (e.g., someone who visits a gym, gets a massage, or prioritizes healthy food when they take a trip). The bulk of wellness tourism is done by secondary wellness travelers, who account for 89% of wellness tourism trips and 86% of expenditures in 2017. Secondary wellness tourism also continues to grow at a faster rate than primary wellness tourism, at 10% compared to 8% annually, from 2015-2017.

## Domestic wellness travel dwarfs international wellness travel, but international wellness trips have been growing faster.

Globally, domestic travel accounts for 82% of total wellness tourism trips and 65% of expenditures. International wellness trips represent a proportionally larger share of expenditures because the average level of spending for an international trip is much higher. International wellness tourism trips have also been growing at a faster pace (12% annually) than domestic wellness tourism trips (9% annually) from 2015-2017.

### Secondary and Domestic Wellness Travel Lead In Trips and Expenditures

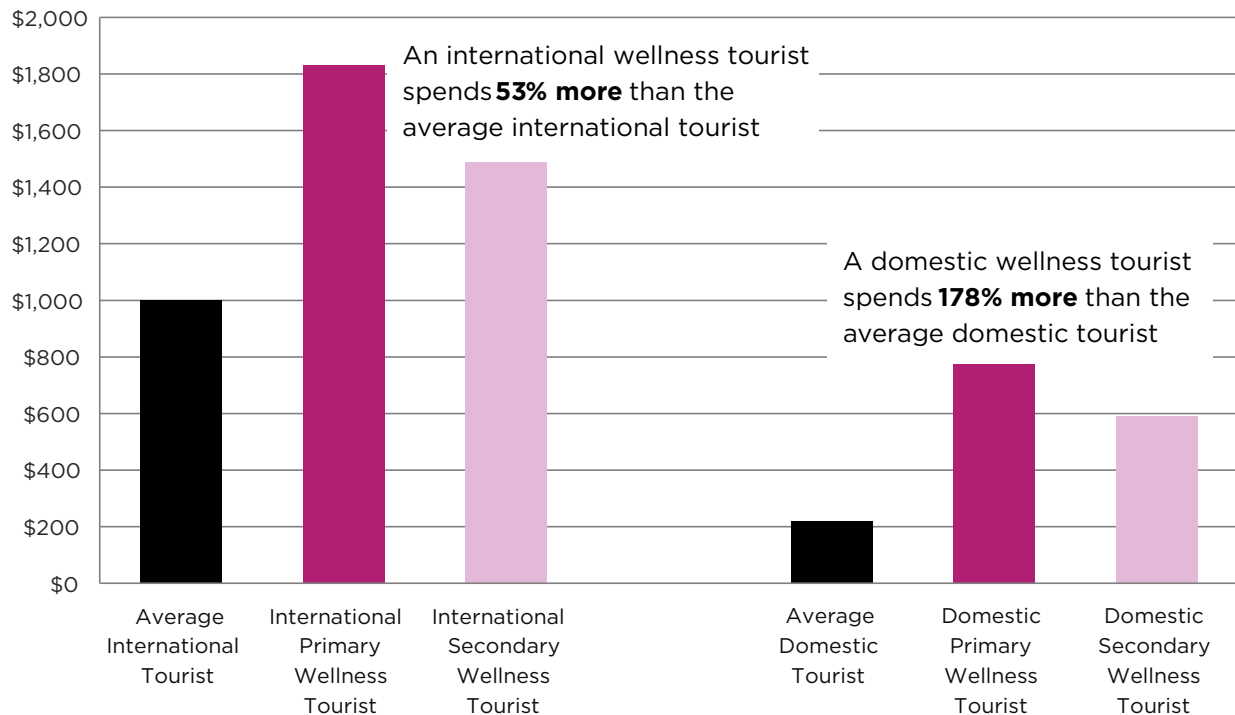


*Note: Figures may not sum to total due to rounding.  
Source: Global Wellness Institute*

## Wellness tourism is high-yield tourism.

Wellness travelers spend more per trip than the average tourist, and this holds true for both domestic and international travelers. In 2017, international wellness tourists on average spent \$1,528 per trip, 53% more than the typical international tourist. The premium for domestic wellness tourists is even higher. At \$609 per trip, they spend 178% more than the typical domestic tourist.

### Wellness Tourism Spending Premiums, 2017



Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International

# Wellness tourism creates opportunities for wellness and all tourism and hospitality-related businesses.

The \$639.4 billion spent globally by wellness travelers is distributed among many segments of the tourism industry, from food and lodging, to activities, excursions, shopping, and other services. Within each segment, some expenditures may include wellness-focused activities (such as visiting a hot spring, getting a massage, or taking a meditation or fitness class), while other expenditures may be “generic” (such as transportation, general food and lodging, or buying souvenirs). As more consumers incorporate wellness into their lifestyles, there are many opportunities for all businesses to infuse wellness into their offerings and capture spending by wellness travelers.

## Wellness Tourism Industry in 2017



*Data combine both inbound/international and domestic wellness tourism spending, and also include both primary and secondary wellness trips.*

*Source: Estimates by the Global Wellness Institute, based on tourism industry data from Euromonitor International.*

## Wellness tourism will continue its growth momentum as more consumers adopt wellness as a key decision driver.

GWII projects that wellness tourism will grow at an average annual rate of 7.5% through 2022, considerably faster than the 6.4% annual growth forecasted for overall global tourism. We expect that global wellness tourism expenditures will reach over \$919 billion in 2022, representing 18% of the global tourism market. Correspondingly, we project wellness tourism trips to grow by 8.1% annually to 1.2 billion trips in 2022. This growth forecast is well-aligned with the expected growth across many sectors that focus on wellness and holistic health (e.g., fitness/mind-body, healthy eating, organic food, etc.), as more consumers adopt wellness as a dominant lifestyle value and decision driver.

Over half of the projected growth in wellness tourism expenditures (and three-quarters of the growth in wellness trips) through 2022 will take place in Asia-Pacific, Latin America-Caribbean, Middle East-North Africa, and Sub-Saharan Africa, driven by a dramatic increase in both domestic tourism and intra-regional wellness tourism in these markets.

### Wellness Tourism Growth Projections, 2017-2022

	Projected Expenditures (US\$ billions)		Projected Average Annual Growth Rate
	2017	2022	2017-2022
North America	\$241.7	\$311.3	5.2%
Europe	\$210.8	\$275.0	5.5%
Asia-Pacific	\$136.7	\$251.6	13.0%
Latin America-Caribbean	\$34.8	\$54.7	9.5%
Middle East-North Africa	\$10.7	\$18.7	11.8%
Africa	\$4.8	\$8.1	11.1%
<b>Total Wellness Tourism Industry</b>	<b>\$639.4</b>	<b>\$919.4</b>	<b>7.5%</b>

*Source: Global Wellness Institute estimates, based upon tourism industry data from Euromonitor International, economic data from the IMF, and GWII's data and projection model*



## Wellness, hospitality, and travel businesses are converging.

Since wellness tourism burst into mainstream consumer consciousness a few years ago, the industry has evolved rapidly. Businesses and governments are investing in developing new strategies, products, experiences, and destinations. Wellness, hospitality, and travel are converging in diverse and unprecedented ways, as businesses experiment with new partnerships and business models to help travelers incorporate wellness into every aspect of their trips.

**Fly healthy and fly well.** Recognizing that air travel can be unhealthy and stressful, airports and airlines are promoting health and wellness programs for their customers. Collaborations among airports, airlines, and wellness businesses are taking many forms: high-end spas, fitness centers, and wellness classes in terminals and airline lounges; in-flight meditation, wellness programming, and sleep aides; healthier food options; and even healthier/biophilic airport design.

**Healthy hotels go mainstream.** As wellness travel becomes more mainstream, many hotels are incorporating wellness into their design, amenities, services, and programming. Wellness features may include bedding and lighting that promote better sleep, windows and shades that block out light and noise, in-room fitness equipment and videos, healthy snacks and menus at restaurants, or on-site spas and gyms. Acquisitions, partnerships, and collaborations between hospitality companies and fitness, spa, and other wellness brands are increasingly common. An emerging trend is the adoption of wellness architecture, biophilic design, and sustainability elements into the entire design of the property.

**Engineering wellness travel experiences.** Consumers increasingly view vacations as an opportunity to experience wellness in new ways, and businesses from cruise lines to tour operators and event organizers are engineering diverse new wellness travel experiences. A number of cruise lines are partnering with wellness industry experts and service providers to raise the quality and sophistication of their wellness offerings or to create wellness-themed voyages.

**Wellness products and brands travel with their customers.** As wellness routines become a daily lifestyle for many consumers, products and brands are following their customers on their travels to help them continue these routines wherever they go (e.g., Westin partnering with Peloton). Some retail and product companies like Lululemon and Free People are extending their wellness-minded brands into experiences, such as offering wellness retreats for their customers.

**A new nexus of travel, work, and wellness.** For those who want to experience a country for a longer duration than the standard vacation, companies such as Roam, Outsite, The Remote Experience, and others are offering a combination of coworking, coliving, and travel, enabling people to experience other countries and cultures while working and living with like-minded individuals for a week, a month, or longer. Many provide on-site wellness/fitness amenities, yoga classes, meditation, and other community events.

Clearly, the rise of wellness tourism is enticing new entrants into the market, as well as new forms of competition and partnerships. The integration of business areas along a continuum from hospitality to wellness and healthy lifestyles will continue to gather momentum. We expect more experimentation in different types of integration within this continuum in the future, as different players in the travel, hospitality, spa, fitness, and retail worlds identify what drives their core customers and seek out new ways to distinguish themselves from competitors in this evolving landscape.

## Destination marketing becomes more authentic and place-based.

Since GWI began studying wellness tourism, the number of countries that actively market some form of wellness tourism at the national level has grown from 65 in 2013 to more than 100 in 2018. Importantly, the nature and focus of wellness tourism marketing and development has become more targeted and authentic. Thermal/mineral springs have seen the biggest growth in marketing and development focus, both in countries with longstanding hot spring bathing traditions (across Europe, Latin America, and Asia), as well as in countries with undeveloped geothermal assets (e.g., Kenya, Rwanda, Ethiopia, Saudi Arabia, Cambodia, India).

A small but growing number of destinations are developing a truly authentic and place-based wellness tourism product and brand — from the state of Kerala, India, which branded itself as the “Land of Ayurveda” over two decades ago, to neighboring countries such as Sri Lanka, Nepal, and Bhutan, each promoting wellness tourism experiences that link wellness with yoga, Ayurveda, meditation, spirituality, pilgrimage, indigenous medicine, faith healing, and happiness. Other examples include Costa Rica’s new “Wellness Pura Vida” tourism campaign, and Beverly Hills’ (U.S.) “City of Wellth” tourism campaign to redefine luxury as less about materialism and more about health, purpose, and happiness.

## Wellness tourism brings wide-ranging impacts to destinations and their people.

As wellness tourism evolves, it is becoming recognized as an opportunity to bring wide-ranging benefits to local economies and populations. As such, wellness tourism development is increasingly integrated with regional economic planning and community development. Austria’s Tirol region has leveraged wellness tourism to develop a broader “Cluster Wellness Tirol” network, which now includes more than 100 businesses in telemedicine, food, nutrition, spa equipment and technology, workplace wellness, and other wellness-related fields. Costa Rica’s “Wellness Pura Vida” strategy (currently under development) aims to engage local communities in the planning process and to use wellness tourism development as a catalyst for social and economic growth in seven regions across the country. Rochester, Minnesota’s 20-year, \$5.6 billion Destination Medical Center initiative builds on the world-class reputation of the Mayo Clinic and its massive medical tourism industry (3 million+ visitors per year). Plans include a “heart of the city” urban district where hospitality intersects with healthcare, with healthy design and extensive wellness lifestyle and leisure amenities that will benefit thousands of Mayo Clinic employees/residents alongside the visitors to the clinic and their families.

## In the future, the wellness of travel will increasingly link to the wellness of the place and how we contribute to it.

As more consumers adopt wellness as part of their value system, they will increasingly filter their travel experiences through a holistic wellness lens, and they will increasingly become interested in the wellbeing of the people in the places that they visit. That is one reason why a high-end resort hotel such as The Breakers Palm Beach (U.S.) puts their employee wellness at the center of their brand and their guest experience, or why Westin Hotels & Resorts is expanding its wellness offerings to organize activities that allow guests to give back to the places they are visiting. Recognizing that the wellness of a place is the DNA of its authentic wellness offering, more destinations, regions (such as Wellness Valley in Romagna, Italy and the state of Colorado in the United States), and countries (such as Costa Rica and Bhutan) are prioritizing the wellbeing of their residents and their environment to create their own unique wellness value proposition and brand.

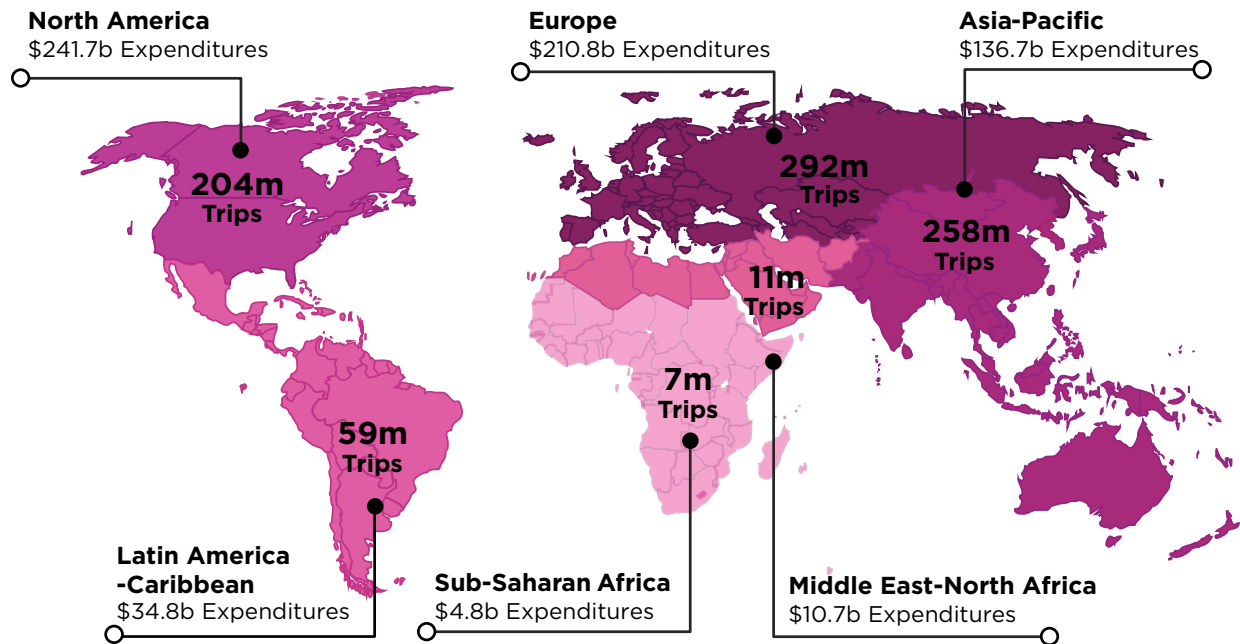
In a holistic wellness framework, being well and doing good are closely connected; we cannot be truly well if our communities and the environment around us are not well. Research from the rapidly expanding fields of happiness, compassion, and altruism suggests that we are more likely to attain a deeper and lasting sense of peace and wellbeing by focusing on others, through helping, giving, and forming deeper connections. In recent years, wellness travel has also been evolving from a focus on being experiential to being transformative. We predict that future wellness travelers will increasingly link personal transformation with the connections they make during travel and their impacts on the people and the places that they touch. Wellness travel will become a more meaningful two-way exchange between the travelers and the destination, instead of a one-sided consumptive and commercial transaction. This consumer evolution, along with the development of wellness tourism, can play an important role in mitigating the negative impacts of over-tourism in some popular destinations and regions.

**For more details on data, framework, and discussions of developments in the wellness tourism economy, please see 2018 Global Wellness Tourism Economy main report available at [globalwellnessinstitute.org](http://globalwellnessinstitute.org).**

## V. REGIONAL HIGHLIGHTS

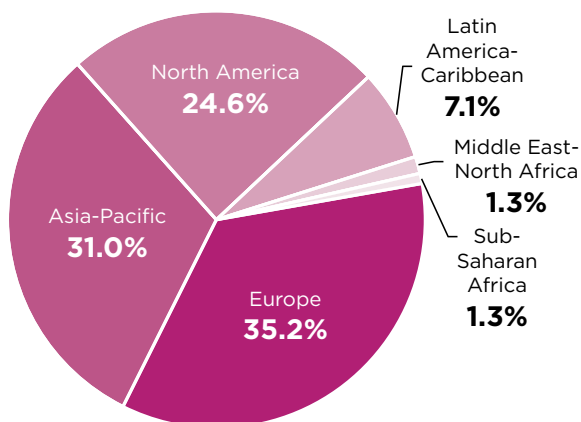
### Wellness Tourism by Region, 2017

Combined Inbound/International and Domestic Wellness Tourism Trips and Expenditures

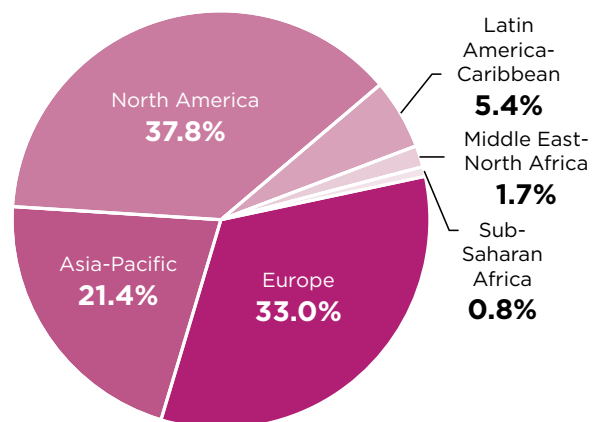


Source: Global Wellness Institute

### Arrivals/Trips



### Receipts/Expenditures



Source: Global Wellness Institute

## North America Wellness Tourism Highlights (2017)



**Number of Wellness Trips:** 204.1 million (4.6% CAGR from 2015-2017)

**Wellness Tourism Expenditures:** \$241.7 billion (5.8% CAGR from 2015-2017)

**Projected Wellness Tourism Expenditures CAGR (2017-2022):** 5.2%

**Average Expenditure per Trip:**

\$3,285 for intl./inbound (44% premium); \$1,058 for domestic (57% premium)

**Direct Jobs:** 2.2 million

### Wellness Tourism Markets in North America, 2017

	Number of Arrivals/Trips (thousands)			Receipts/Expenditures (US\$ millions)
	Inbound/Intl.	Domestic	Total	
United States	9,360.2	167,179.1	<b>176,539.3</b>	<b>\$226,017.7</b>
Canada	2,207.8	25,318.2	<b>27,526.0</b>	<b>\$15,652.6</b>

*Note: These figures include both primary and secondary wellness trips. Expenditures data combine both international/inbound and domestic wellness tourism spending. Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International*

### Wellness Tourism Spending Premiums in North American Markets, 2017

	Average Spending per INBOUND/INTERNATIONAL Trip		Average Spending per DOMESTIC Trip	
	Wellness Trip	Average Trip	Wellness Trip	Average Trip
United States	<b>\$3,812</b>	\$2,689	<b>\$1,139</b>	\$716
Canada	<b>\$1,052</b>	\$731	<b>\$527</b>	\$291

*Note: These figures include both primary and secondary wellness trips. Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International*

## North America Wellness Tourism Developments

- Over one-third of the states in the United States now promote some form of wellness tourism on their official state tourism marketing website (by comparison, only eight states were marketing the sector in 2013). These are primarily concentrated in the western United States and typically highlight their natural hot springs and/or spas. A few states also emphasize a broader, more holistic approach to wellness; for example, New Mexico highlights its Native American-inspired traditions and treatments, while Maine markets meditation and yoga amidst its natural scenery. For Canada, six out of its eleven provinces actively promote wellness to tourists. While hot spring bathing figures prominently, some of the major tourist destinations, such as Ontario and British Columbia, also focus on spas and general wellness offerings. While state, provincial, and local tourism boards are starting to take notice of the growth in this sector, most of the wellness tourism developments, investments, and marketing campaigns in North America continue to be driven by private businesses.
- The rise of wellness travel is driving new positioning and promotion strategies in North America's hospitality industry. Industry leaders recognize the growing demand for wellness, not just at destination getaways but also in urban locations. Companies such as Canyon Ranch and Six Senses are expanding from their base of destination resorts into major U.S. metropolitan areas (e.g., Six Senses announced that their first North American property will be a luxury urban hotel adjacent to Manhattan's popular High Line). Luxury brands such as Four Seasons, Ritz-Carlton, and Mandarin Oriental have created wellness programs and health and fitness offerings that rival the top destination spa resorts. Mandarin Oriental hotels, for example, have on-site wellness professionals who offer customized Pilates, yoga, meditation, and tai chi classes. Meanwhile, numerous brands are rolling out new wellness initiatives to appeal to the growing number of business and leisure travelers who value healthy food, fitness, and mind-body balance. Leisure hotels aggressively market wellness weekends and rejuvenation retreats, and they promote their wellness offerings and environments as distinguishing characteristics. Business hotels address the time constraints of their guests by providing options such as shorter massages or in-room fitness equipment. Hilton, for example, launched "Five Feet to Fitness," which provides more than 11 different equipment and accessory options to guests in premium fitness rooms (which cost \$45 more than a standard room).
- Many hotel chains have developed partnerships with recognized wellness industry leaders to increase flexibility and offer expanded services/programming to guests. These partnerships can range from streaming content (e.g., Pilates, yoga, meditation) to providing interactive fitness equipment (e.g., Peloton). Examples of partnerships between major brands include: Shangri-La and Lululemon; Mandarin Oriental Hotels and the Mayo Clinic; Park Hyatt Hotels and MNDFL Meditation; Fairmont Hotels with Reebok and Technogym; and Wyndham Hotels and Resorts with Stay Well™/Delos. For urban hotels where space is more challenging, some brands have formed partnerships with local boutique exercise studios, massage therapists, and spas to package offerings close to their properties.
- Airports and airlines continue to step up their wellness amenities to target secondary wellness travelers (i.e., those who want to maintain wellness during travel). Airport spas — in small kiosks and stores within terminals, as well as in airline first-class lounges — have proliferated in North American airports. Offerings can range from saunas, massages, manicures, pedicures,

and haircuts to oxygen therapy, cryotherapy, guided meditation, and VR-assisted relaxation. While airline lounges are generally reserved for first- and business-class passengers or club members, many airlines sell spa access for a daily or half-day fee. Wellness services are also extended in other ways. American Express partners with Exhale to offer spa services at airport lounges. Delta has employee-only spas at several airports. Canyon Ranch is partnering with Singapore Airlines to step-up wellness amenities for passengers on ultra-long-haul flights. Additional airport wellness offerings on the rise include: “silent airports,” yoga rooms, in-transit fitness clubs, therapy dogs, napping pods and suites, treadmill desks, and designated terminal walking circuits.

## Spas

- The spa industry has enjoyed steady growth in North America, driven by a steady economy and rising consumer spending on all things related to wellness. Growth has been led by hotel/resort spas as well as medical spas. A 2017 ISPA survey reported that 42% of hotel/resort sector respondents cite “wellness, health and fitness” as the top trend affecting the spa industry.<sup>1</sup> Luxury branded hotels (e.g., Four Seasons, Fairmont, Ritz-Carlton, etc.) increasingly use their spas and wellness programs as a marketing tool for hotel guests and to generate revenue from non-guest customers. Some hotels have begun charging a general resort fee whether guests use the wellness amenities or not.
- Medical spas are enjoying rising demand, reflecting increased consumer interest in self-care, maintenance, anti-aging, and beauty. While the majority of customers are women between the ages of 35-54, there is also rising interest from men and under-35 customers. According to the American Med Spa Association, in recent years there is a pronounced increase in demand for less invasive treatments such as injectables, chemical peels, and non-surgical skin tightening, in addition to body sculpting and tattoo removal. Many medical spas are investing in a more spa-like and less clinical/medical environments and atmospheres for their customers. Capitalizing on rising demand and the success of single service models such as Drybar (for blowouts), Alchemy 43 has attracted seed funding to launch a series of locations that focus on Botox and fillers in a spa/salon-like setting in major cities.
- Franchises such as Massage Envy, Elements Massage, Massage Heights, and Hand & Stone continued to grow from 2015-2017, particularly in the suburbs and secondary city markets, but at a slower rate as compared to the previous two years. This leveling of growth is probably attributed to a maturing market, cost pressures, and aggressive discounting and competition from small, single-service establishments (e.g., reflexology centers, Thai massage clinics, etc.). GWI estimates that there were about 2,500 franchised spas in the United States in 2017, up from about 1,500 locations just five years earlier in 2012.<sup>2</sup>

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<sup>1</sup> International SPA Association (2017). *2017 U.S. Spa Industry Study*. Lexington, KY: International SPA Association.

<sup>2</sup> Global Wellness Institute analysis of data from Entrepreneur.com. *Global Wellness Tourism: Europe – Global Wellness Institute | 14*

- Zeel, a pioneer in the model of massage-on-demand, has expanded to more than 75 U.S. cities, and has launched a new platform that places licensed massage therapists on-demand at hundreds of spas, salons, and hotel partners, to help manage staffing and demand surges. Meanwhile, Soothe — a newcomer to massage-on-demand — recently raised \$31 million in new capital to fund expansion in the U.S. market and to launch new services in the UK and Australia. Similar on-demand and app-based services are also proliferating in the salon and beauty sector, with the growth of companies such as Glamsquad, BeGlammed, TheGlamApp, and BeautyLynk.

## Thermal/Mineral Springs

- The majority of thermal/mineral springs are located in the Western and Southwestern United States and Western Canada, and these establishments tend to be fairly rustic bathing- and swimming-focused facilities. The thermal/mineral springs sector is quite underdeveloped in North America as compared to other wellness sectors, mainly because North Americans have not developed the type of bathing culture prevalent in much of Europe and East Asia. But that is changing, with a rising interest in and visitation to springs due to a confluence of consumer values and lifestyle preferences. Overall, more people are looking to nature and its power to calm and rejuvenate. Across North America and especially in Canada, consumers are discovering the healing powers of water, from Nordic spa circuits to hydrotherapy. Finally, the rise of loneliness has created awareness of the value of “third places” — social environments outside of home and work, where people can find community with one another. These trends, and the accessibility and affordability of visiting hot springs, are expected to drive the growth of the springs sector (and other wellness sectors) over the next decade.
- Business owners and investors are taking note of these trends and are renovating, expanding, and reopening historic hot springs facilities in many locations across the United States. Multi-million dollar expansions continue at California’s iconic Two Bunch Palms and Glen Ivy Hot Springs. Several new facilities and reopenings of shuttered properties are slated over the next few years in Arizona, Wyoming, Montana, and California, while longer-term thermal spring redevelopment projects are in the works from California to Texas to South Dakota.



# APPENDIX A: EUROPEAN COUNTRIES CURRENTLY PROMOTING WELLNESS TOURISM

## North America

	National/Official Tourism Website Promotes Wellness Tourism	National Tourism Strategy Addresses Wellness Tourism	Wellness Tourism Is a Target for National Investment Promotion
United States (state-level)			
Arizona	Yes		
Arkansas	Yes		
Colorado	Yes		
Connecticut	Yes		
Florida	Yes		
Hawaii	Yes		
Idaho	Yes		
Indiana	Yes		
Maine	Yes		
Michigan	Yes		
Nevada	Yes		
New Mexico	Yes		
Utah	Yes		
Vermont	Yes		
Virginia	Yes		
Washington	Yes		
West Virginia	Yes		
Wyoming	Yes		
Canada (provincial-level)			
Alberta	Yes		
British Columbia	Yes		
Manitoba	Yes		
Ontario	Yes		
Saskatchewan	Yes		
Yukon	Yes		

## APPENDIX B: ACKNOWLEDGEMENTS

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The authors are indebted to the many industry leaders and experts who shared their time, expertise, data, and research to inform the global wellness economy data and insights:

**Adriana Azuara**, CEO, All4Spas, Mexico

**Brian Badura**, Director, Global Public Relations & Strategic Initiatives, Seabourn Cruise Line, United States

**Anna Bjurstam**, Vice President of Spa & Wellness, Six Senses Hotels Resorts Spas; Partner, Raison D'Etre, Sweden

**Rocco Bova**, General Manager, Chable Resort & Spa, Mexico

**Alexia Brue**, Co-Founder and CEO, Well+Good, United States

**Eduardo Carstens Chalita**, Director, Marketing & Sales, Grupo Megaterra, Mexico

**Jorge Alfonso Carstens Chalita**, Director, Marketing & Sales, Grupo Megaterra, Mexico

**Dorcas Cheung**, Head of Trade Marketing, Annabelle Asia Company, Hong Kong

**Jon Canarick**, Managing Director, North Castle Partners, United States

**Randall Corcoran**, Director, Onboard Revenue, Holland America Group, United States

**Des Cummings Jr.**, Executive Vice President, Florida Hospital, United States

**Tony de Leede**, Founder, Gwinganna Lifestyle Retreat, Australia

**Katherine Droga**, Founder, Droga & Co., Australia

**Susie Ellis**, Chairman and CEO, Global Wellness Summit, United States

**Sallie Fraenkel**, President, Mind Body Spirit Network, United States

**CG Funk**, Speaker and Consultant, Beauty, Spa and Wellness, United States

**Melisse Gelula**, Co-Founder and Chief Content Officer, Well+Good, United States

**Wendy Gelfound**, Area Director of Marketing, Hospitality Division, The Howard Hughes Corporation, United States

**Andrew Gibson**, Chairman, Wellness Tourism Association; formerly Vice President for Wellbeing, Luxury Brands, AccorHotels, UAE

**Adam Glickman**, Principal, Parallax Hospitality, United States

**Charlie Hartwell**, Operating Partner, Bridge Builders Collaborative, United States

**Mark Hennebry**, Director at CP Holdings; Vice Chairman, Danubius Hotel Group, United Kingdom

**Ed Hoganson**, Chief Financial Officer and Treasury, Hospitality Investors Trust, United States

**David Humphrey**, Chairman of the Board, Massage Heights, United States

**C.K. (Chee Kwong) Low**, Managing Director, HerbalLine, Malaysia

**Kim Matheson Chedrick**, Senior Vice President, WTS International, United States

**Tomonori Maruyama**, Chief Researcher & Manager at the Research Institute, Mitsui Knowledge Industry Co., Ltd., Japan

**Beth McGroarty**, Director of Research and Public Relations, Global Wellness Summit, United States

**Wendy Nierel-Bosalavage**, President, LIVunLtd, United States

**Stephanie Rest**, Consultant, Caribbean Wellness & Education, United States

**Katie Roberts**, Senior Director of Global Consumer Public Relations, Marriott International, United States

**Melissa Rodriguez**, Senior Research Manager, IHRSA, United States

**Ricardo Rose**, Certified Personal Trainer, Equinox and Everybody Fights, United States

**Zev Suissa**, Chief Innovation Officer, Strategic Partnerships, eMindful, United States

**Liz Terry**, CEO, Leisure Media & CLADglobal, United Kingdom

**Tom Waller**, Senior Vice President of Whitespace, Lululemon, Canada

**Jeff Wang**, Chairman, Chongqing Hakone Hot Springs & Thermalism Industry, China

**Josef Woodman**, CEO, Patients Beyond Borders, United States

**Vivien Yeung**, General Manager, Venture at Lululemon, Canada

**WE ACKNOWLEDGE AND THANK OUR INDUSTRY RESEARCH SPONSORS  
WHO MADE THIS REPORT POSSIBLE:**

Biologique Recherche

Canyon Ranch

Booker by MINDBODY

HydraFacial

AccorHotels

BodyHoliday

Cannuka

Herbalife Nutrition

Lake Austin Spa Resort

Miraval and exhale

OM4 Organic Male

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333 S.E. 2nd Avenue, Suite 2048  
Miami, FL 33131, USA

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