

Global Wellness  
Tourism Economy:

# Europe

NOVEMBER 2018



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[GLOBALWELLNESSINSTITUTE.ORG](http://GLOBALWELLNESSINSTITUTE.ORG)

# 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

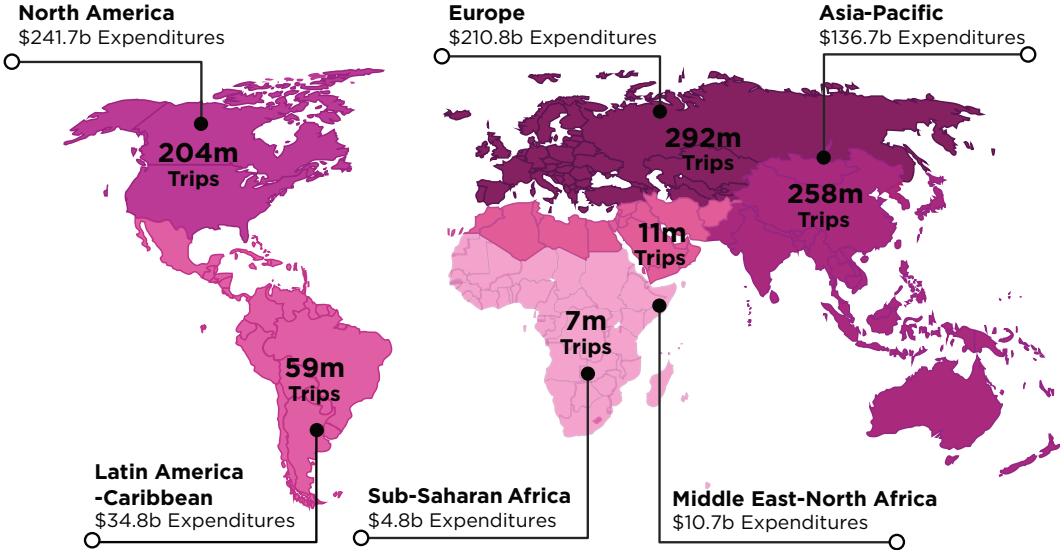
Wellness tourism is travel associated with the pursuit of maintaining or enhancing one’s personal wellbeing. GWI estimates wellness tourism is a \$639 billion global market in 2017, growing more than twice as fast as general tourism.

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

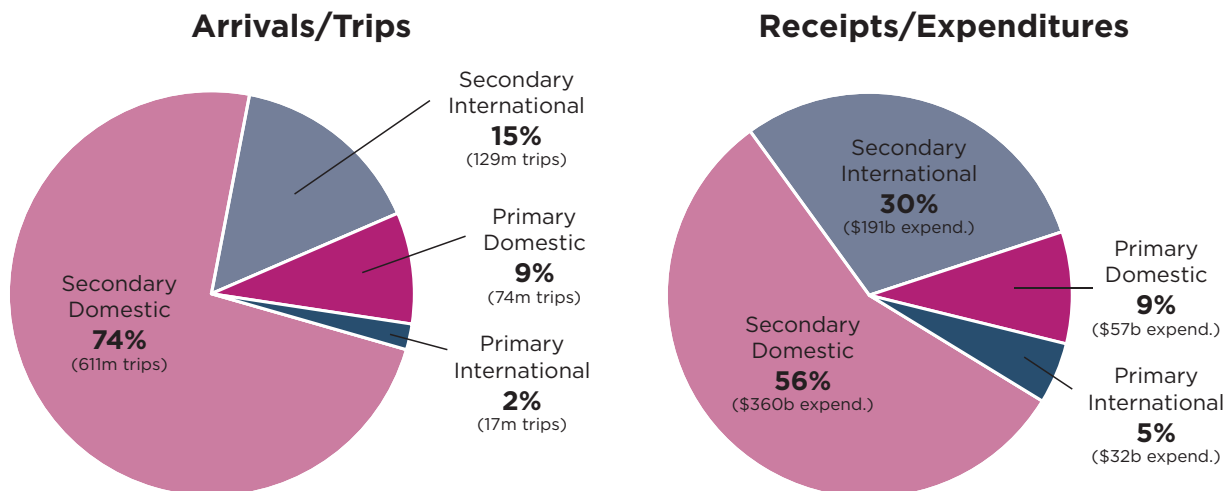
## Secondary wellness travelers account for the bulk of wellness tourism trips and growth: 89% of trips and 86% of expenditures.

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

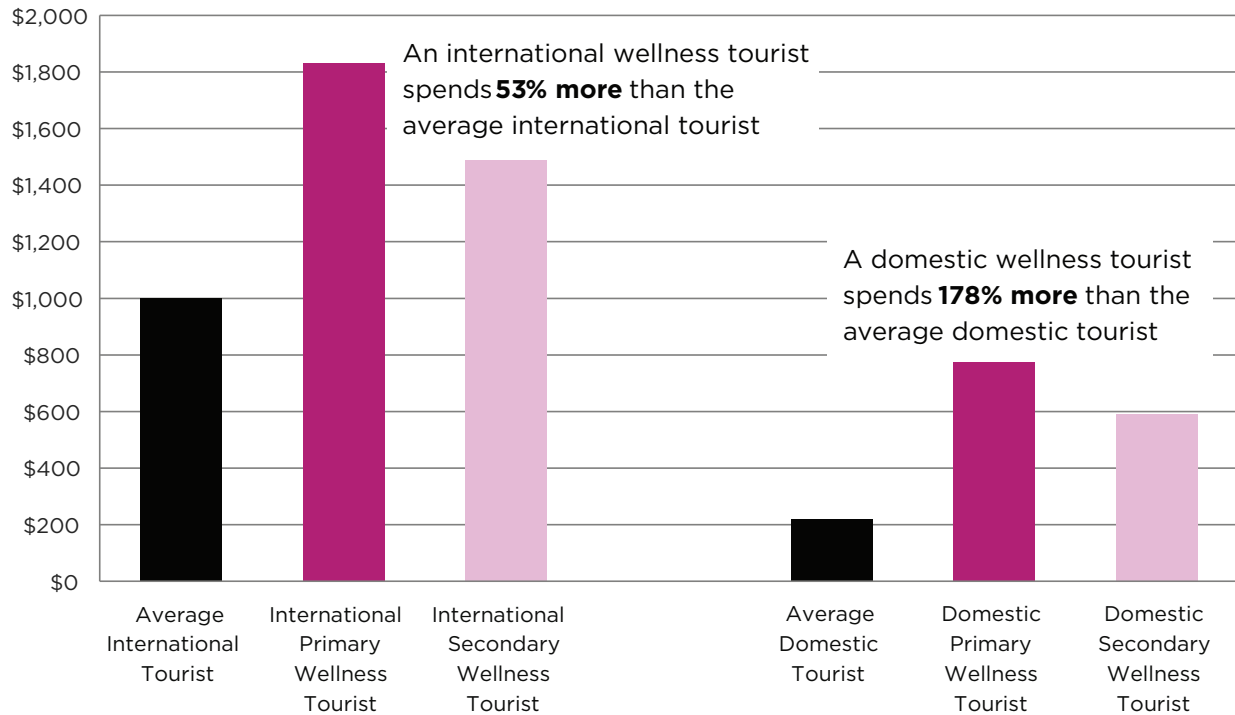


*Note: Figures may not sum to total due to rounding.  
Source: Global Wellness Institute*

## 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.

GWI 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 GWI'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).**

## Europe Wellness Tourism Highlights (2017)



**Number of Wellness Trips:** 291.8 million (8.1% CAGR from 2015-2017)

**Wellness Tourism Expenditures:** \$210.8 billion (4.4% CAGR from 2015-2017)

**Projected Wellness Tourism Expenditures CAGR (2017-2022):** 5.5%

**Average Expenditure per Trip:**

\$1,209 for intl./inbound (65% premium); \$594 for domestic (105% premium)

**Direct Jobs:** 3.2 million

### Top Ten Wellness Tourism Markets in Europe, 2017

	Number of Arrivals/Trips (thousands)			Receipts/Expenditures (US\$ millions)
	Inbound/Intl.	Domestic	Total	
Germany	6,197.3	59,855.8	<b>66,053.1</b>	<b>\$65,746.3</b>
France	6,840.3	25,573.4	<b>32,413.7</b>	<b>\$30,714.6</b>
Austria	7,000.8	9,848.6	<b>16,849.3</b>	<b>\$16,509.8</b>
United Kingdom	3,613.1	19,579.1	<b>23,192.2</b>	<b>\$13,478.1</b>
Italy	2,530.5	10,574.0	<b>13,104.5</b>	<b>\$13,428.4</b>
Switzerland	4,070.6	5,670.6	<b>9,741.2</b>	<b>\$12,571.3</b>
Spain	4,109.4	14,735.7	<b>18,845.1</b>	<b>\$9,885.6</b>
Turkey	3,119.0	5,947.1	<b>9,066.1</b>	<b>\$4,387.7</b>
Russia	2,093.6	13,733.0	<b>15,826.6</b>	<b>\$3,997.4</b>
Portugal	1,552.9	3,010.0	<b>4,562.9</b>	<b>\$3,405.2</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 the Top Ten Markets, 2017

	Average Spending per INBOUND/INTERNATIONAL Trip		Average Spending per DOMESTIC Trip	
	Wellness Trip	Average Trip	Wellness Trip	Average Trip
Germany	<b>\$1,901</b>	\$1,180	<b>\$902</b>	\$536
France	<b>\$1,166</b>	\$759	<b>\$889</b>	\$554
Austria	<b>\$1,189</b>	\$780	<b>\$831</b>	\$524
United Kingdom	<b>\$1,535</b>	\$883	<b>\$405</b>	\$229
Italy	<b>\$1,325</b>	\$907	<b>\$953</b>	\$642
Switzerland	<b>\$2,070</b>	\$1,227	<b>\$731</b>	\$457
Spain	<b>\$1,547</b>	\$1,004	<b>\$240</b>	\$148
Turkey	<b>\$891</b>	\$537	<b>\$271</b>	\$159
Russia	<b>\$384</b>	\$201	<b>\$233</b>	\$123
Portugal	<b>\$1,101</b>	\$710	<b>\$563</b>	\$357

*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*

## Europe Wellness Tourism Developments

- Wellness tourism has deep roots in Europe. For centuries, people have traveled within the region to take advantage of hot springs, alpine air, sea breezes, slow food, and idyllic landscapes, in order to escape from everyday life and pursue recreation and healing. Europeans are sophisticated wellness consumers, based on longstanding cultural and historical traditions across the region, and this influences their propensity for wellness travel. In a Eurobarometer survey of 30,000 Europeans across 33 countries, 13% indicated that wellness/spa/health treatments were their primary or secondary motivation for going on holiday in 2015 (and the share of trips for which wellness was a primary motivation has doubled, from 3% in 2010 to 6% in 2015). In several countries, the propensity for primary-motivation wellness trips is very high, including Iceland (19% of survey respondents), Sweden (17%), Hungary (16%), Portugal and Slovakia (15%), and Czech Republic (10%).<sup>1</sup>
- Europe's wellness tourism industry continues to leverage its historic wellness assets, while upgrading its infrastructure (spas, wellness hotels, health resorts, etc.) and service offerings to attract the modern consumer. Throughout the region, governments and destinations are looking to wellness tourism to diversify their tourism sector, carve out a unique niche, reduce seasonality, combat over-tourism in some cases, and bring more benefits to their local communities and small businesses. For example, Russia's tourism plan for 2020 emphasizes the importance of enhancing spa and wellness sector quality and offerings to attract domestic and international wellness tourists. Italy recently launched Terme d'Italia, a project aimed at stimulating demand for spas and wellness resorts in eight regions. Azerbaijan, a relative newcomer that has received attention from the National Geographic Traveler Awards, is highlighting its thermal wealth and the unique quality of its mud to elevate its wellness tourism standing.
- A majority of the countries in Europe promote some form of wellness on their national tourism websites, with many highlighting their well-developed and historic thermal resources and spas. A smaller, but still considerable, number of countries also focus on developing this sector as part of their national tourism development/marketing strategies. Ten nations, including Slovenia and Montenegro have national initiatives designed to encourage investment in wellness sectors. Finland, for example, seeks to use public-private partnerships to enhance its wellness tourism offerings. Similarly, Croatia hopes to create a spa tourism zone around one of its leading thermal spas, providing financial incentives for wellness tourism projects in this area.

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<sup>1</sup> 1) European Commission (2016). *Preferences of Europeans towards Tourism*. Flash Eurobarometer Report No. 432. 2) European Commission (2011). *Survey on the attitudes of Europeans towards tourism*. Flash Eurobarometer Report No. 328. Both available at: <https://ec.europa.eu/growth/tools-databases/vto/eurobarometer>.

- In Central and Eastern Europe, wellness tourism is intrinsically linked to thermal resources and an extensive network of historic health resorts and sanatoria, where guests stay for doctor-supervised, water-based medical treatments, financed wholly or partially by national insurance systems. Many of these sanatoriums are now undergoing renovations, modernization, and wellness menu enhancements (mostly with private investment) in order to attract a younger clientele who are seeking wellness rather than medical treatments, and who are more likely to spend on room upgrades, add-on services, and a higher quality experience.
- The quest for differentiation and authenticity has led many industry players to refocus on their own traditions and wellness modalities in designing destinations and crafting guest experiences. Some look to their bathing traditions; for example, Finnish saunas, Austrian sauna aufguss, and Russia banya all offer distinctive experiences that combine wellness with rituals, community, fun, and entertainment, within a specific cultural context. With Scandinavians consistently ranking as the happiest people in the world, there is also surging interest in Nordic lifestyle concepts such as hygge (“cozy” for the Danish and Norwegians) and lagom (“balanced” or “just right” for the Swedish), which can be incorporated into facility design, guest experiences, wellness offerings, and marketing/promotion.
- Wellness trips and retreats that are built around a specific wellness activity are on the rise, from boot camps to meditation and silence retreats. There is more demand to combine activities in nature with wellness modalities, such as hiking to a scenic location for meditation, or yoga and tai chi in an outdoor setting. Short-haul, weekend getaways continue to grow — not only for couples and girlfriends, but increasingly for families (including multi-generations) — and destinations are modifying their amenities and programming to accommodate this trend.

## Spas

- Across the region, the spa market has been growing at a steady pace alongside stable economic growth and rising consumer interest in services and activities that align with their wellness lifestyle. Spa offerings are proliferating to provide novelty, diversity, and choices to customers. Some spas are expanding along a full range of holistic health and preventive services that extend to nutritional advice, sleep therapy, sound therapy, gut microbe analysis, energy healing, and so forth. Others are adopting wellness and healing modalities from different traditions and cultures: Finnish saunas, Japanese onsens, Turkish hammams, Traditional Chinese Medicine, and Ayurveda are no longer confined to their country or region of origin, or to niche spas. At the same time, establishments that provide a single, specialized wellness service/treatment also continue to grow, from beauty treatments, massage, and reflexology, to reiki, flotation tanks, cryotherapy, salt caves, etc., competing with similar offerings at conventional full-service day spas and hotel/resort spas.
- Spas are also responding to a rising need for mental wellness and stress reduction, along with growing interest in igniting and supporting behavioral change that will lead to a more healthful, balanced, and fulfilled life for guests outside of the spa. To complement body/energy work, many spas are beginning to offer more personalized and tailored services, such as nutritional assessments, individual counseling/advice, holistic personal wellness plans, coaching, etc. Overall, there is a gradual shift and expansion in offerings, as more spas recognize that they are no longer operating within the confines of the spa sector but competing in a much broader and quickly evolving landscape of the wellness industry.

- Consumer adoption and understanding of wellness is quickly evolving, and many spas are undergoing redesign/refurbishments of their facilities and offerings, reflecting emerging needs and preferences, such as: the desire for community (e.g., creating club-like settings and atmospheres, or group programs and classes that facilitate connections among guests); intergenerational wellness experiences (e.g., “better-aging” modalities; kids/teen spa treatments, classes, and activities); water for healing (e.g., hydrotherapy, watsu, therapeutic thermal/mineral spring bathing and treatments); and using nature to enhance our sense of wellbeing (e.g., forest bathing; use of natural, organic, and local ingredients; biophilic design of facilities).

## Thermal/Mineral Springs

- Thermal and mineral springs have been a part of wellness rituals in many European countries for centuries, and they are intrinsically linked to the strong bathing culture and tradition across the continent. Natural therapies related to water are as extensive as they are varied: balneotherapy, thalassotherapy, mud, salts, algae, etc.
- European countries that have a large sector of sanatoria-style health resorts catering to government-funded patients are looking to upgrade, privatize, and diversify many of these establishments. Investments are being made in thermal resorts and spas all over Europe, some in major expansions of well-established assets — for example, the addition of a subterranean spa, a Retreat Lagoon, hotel, and restaurant at the renowned Blue Lagoon in Iceland. Some investments aim to introduce cross-cultural bathing experience, such as introducing Japanese-style onsens or Turkish baths to European bathers at existing or new thermal resorts. Many facilities receive new investments to add spa and complementary wellness services, facilities, and programming that will appear to a broader range of guests, such as health food restaurants, beauty treatments, fitness studios, and mind-body classes.
- With the rise of wellness and wellness tourism, thermal/mineral springs across Europe are viewed as a vital resource for tourism and economic development. Many new investments and marketing initiatives have been launched in recent years, from “the Year of Healthy Waters” promotion in Slovenia, to a Spain-Portugal partnership to jointly promote thermal establishments along their border. “Roman Thermal Spas of Europe” is a multi-country (Greece, Germany, Hungary, Portugal, France, and Bulgaria) partnership to develop and promote thermal tourism packages involving spas and health resorts with a Roman origin. Greece and Turkey, among other countries, have placed hot springs at the center of their tourism promotion themes, seeking investments to modernize and upgrade thermal offerings.

# APPENDIX A: EUROPEAN COUNTRIES CURRENTLY PROMOTING WELLNESS TOURISM

## Europe

	National/Official Tourism Website Promotes Wellness Tourism	National Tourism Strategy Addresses Wellness Tourism	Wellness Tourism Is a Target for National Investment Promotion
Andorra	Yes	Yes	No
Armenia	Yes	Yes	No
Austria	Yes	No	No
Azerbaijan	No	Yes	Yes
Bosnia Herzegovina	Yes	No	No
Bulgaria	Yes	Yes	Yes
Croatia	Yes	Yes	Yes
Cyprus	Yes	No	No
Czech Republic	Yes	Yes	No
Denmark	Yes	No	No
Estonia	Yes	Yes	Yes
Finland	Yes	Yes	Yes
France	Yes	Yes	Np
Georgia	Yes	Yes	Yes
Germany	Yes	No	No
Greece	Yes	No	No
Hungary	Yes	Yes	Yes
Iceland	Yes	No	No
Ireland	Yes	No	No
Italy	Yes	No	No
Kazakhstan	Yes	Yes	No
Kyrgyzstan	Yes	No	No
Latvia	Yes	Yes	No
Lithuania	Yes	Yes	Yes
Luxembourg	Yes	No	No
Malta	Yes	No	No
Monaco	Yes	No	No
Montenegro	Yes	Yes	Yes
Netherlands	Yes	No	No
Norway	Yes	No	No



Poland	Yes	Yes	Yes
Portugal	Yes	No	No
Romania	Yes	Yes	Yes
Serbia	Yes	Yes	Yes
Slovakia	Yes	Yes	Yes
Slovenia	Yes	Yes	Yes
Spain	Yes	No	No
Sweden	Yes	No	No
Switzerland	Yes	Yes	Yes
Turkey	Yes	No	Yes
Turkmenistan	Yes	No	No

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

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

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