

Wellness Tourism Initiative 2020 USA and Canada survey results

Travel needs and intentions of US and Canadian customers

The Global Wellness Institute's (GWI) Wellness Tourism Initiative is an industry-led global think tank dedicated to sharing consumer insights and trends in wellness travel. This survey examines a sector worth \$639 billion in yearly visitor expenditure. It explores what consumers seek on wellness trips, their travel motivations, what influences their decisions, and how they book. Other regional recaps and our full global traveler intentions survey can be downloaded from the GWI website.

Even pre-COVID, North Americans tended to look local first; wellness journeys need not cross the globe

Q1: Top destinations travelers want to visit for wellness travel in next two years:

1. USA **29%**
2. Canada **19%**
3. Italy **13%**
4. Switzerland **13%**
5. Mexico **13%**
6. Thailand **12%**
7. Australia **11%**

Generalized wellness/adventure experiences more highly sought after than specific treatment goals

Q2: Top reasons for wellness-focused travel

- Destress and relax **55%**
- Adjust or reboot health and wellbeing focus **51%**
- Improve my mental wellness **41%**
- Adventure activities **32%**
- Maintain current health and wellbeing focus **25%**
- Spiritual journey **23%**
- Focus on fitness **12%**
- Diet/nutrition/anti-aging/medical procedures/detox/transformation **<10%**

(Respondent provided top 3)

It's all about nature and culture; urban properties should take notice and program/message accordingly

Q3: What's most important to travelers on a wellness trip?

- Location connected to nature **60%**
- Quality fresh local cuisine **51%**
- Quality accommodation **51%**
- Outdoor activities **43%**
- Spa services **39%**
- Connection to local culture **32%**

(Respondent provided top 3)

Limited demand for structured wellness journeys; non-traditional properties can get creative to attract wellness travelers

Q4: What type of wellness program do you prefer?

- Semi-structured **57%**
- Completely unstructured **39%**
- Fully structured **4%**

Word of mouth and guest reviews most critical; editorial and social media influential for some

Q5: Top influences in planning wellness trips

1. Word of mouth **70%**
2. Past guest reviews **49%**
3. Editorial on wellness travel **29%**
4. Social media **24%**
5. Award winning places **22%**
6. Special offers/promotions **17%**
7. Travel agent/specialist **12%**
8. Gym/doctor/trusted local expert **11%**
9. Celebrity/guru/social media influencer **11%**

(Respondent provided top 3)



INITIATIVE MEMBERS

USA - Adam Glickman (Vice Chair) Parallax Hospitality

Canada - Daniel Poulin, Accor

Australia - Katherine Droga (Chair), Droga & Co. and the Wellness Tourism Summit

India - Vijay Kumar Karai, AyurUniverse

Italy - Sandro Billi, Side Note SCC

Romania - Ioana Marian, despreSpa

Singapore - Joanne Barber, We Affirm Co.

Thailand - Lee Woon Hoe, Banyan Tree Hotels and Resorts



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Vast majority of travelers book direct; opportunities abound for new entrants such as specialized agents and booking platforms to seize market share

Q6: How do travelers book wellness trips?

	INTERNATIONAL TRIP	DOMESTIC TRIP
Direct with brand via website	59%	73%
Via general OTA (Online Travel Aggregator)	15%	13%
Via an online travel website focusing on wellness travel	10%	6%
Travel agent	13%	6%
Don't book in advance	4%	3%

Travelers will pay a premium for accommodations that meet their wellness needs; effectively communicating wellness attributes is a useful mechanism to drive rate premiums

Q7: For leisure travel, assuming location and quality of accommodations are similar, how much more are you willing to spend for a property that has wellness offerings that best meet your needs?

- No more **2%**
- 1%-5% more **16%**
- 6%-10% more **35%**
- 11%-15% more **19%**
- 16%-20% more **18%**
- Over 20% more **10%**

About the survey

- 225 US/Canada respondents
 - USA **61%**
 - Canada **39%**
- Date: Fall 2019
- Respondent gender:
 - Male **32%**
 - Female **68%**
- Respondent age group:
 - 18-24 years **4%**
 - 25-34 years **20%**
 - 35-54 years **52%**
 - 55-64 years **25%**
 - 65-74 years **7%**
 - 75+ years **1%**
- Respondent family status:
 - Kids **59%**
 - No kids **41%**

More information

For more information about the survey or other GWI initiatives please email us at adam@parallaxhospitality.com or daniel.poulin@accor.com

Thank you to the GWI Wellness Tourism Initiative team for their efforts in delivering these valuable global insights.

Find out more about the Wellness Tourism Initiative at globalwellnessinstitute.org/initiatives/wellness-tourism



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