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Global Wellness Tourism Market Size Study and Forecast by Service (In-country Transport, Lodging, Food & Beverage, Wellness Activities, Shopping, Others), by Travel Purpose (Primary, Secondary), by Travel (Domestic, International), and Regional Forecasts 2026–2036

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Abstracts

The Global Wellness Tourism Market, valued at USD 990.40 billion in 2025, is anticipated to reach USD 2,620.22 billion by 2036, growing at a 9.2% CAGR during the forecast period.Wellness tourism has morphed from a niche health-focused travel segment to a mainstream travel category covering preventive healthcare, holistic wellness experiences, fitness, nutrition, mindfulness and therapeutic recreation. Market growth is driven by growing health awareness, increasing wellness spending, expanding adoption of preventive healthcare, rising demand for experiential travel and the expansion of the digital wellness ecosystem. Rising wellness expenditure continues to influence tourism demand patterns globally. According to the Global Wellness Institute, the global wellness economy surpassed USD 6.3 trillion in 2023. Meanwhile, in 2024 the World Health Organization reported that physical inactivity is a major public health challenge affecting over 1.8 billion adults worldwide. Travelers are increasingly using discretionary dollars to purchase wellness-oriented experiences that enhance physical, emotional and mental wellbeing. This shift is creating sustained demand for wellness resorts, destination retreats, therapeutic programs, wellness hospitality infrastructure and specialized travel services in both developed and emerging tourism markets.
Wellness tourism refers to economic activities linked to travel experiences undertaken to maintain, improve or restore personal wellbeing. It holds a strategic position between healthcare, hospitality, tourism, fitness, nutrition and lifestyle services. The sector is playing an increasingly important role in destination competitiveness as governments

seek higher-value tourism segments with stronger visitor spending profiles. Wellness tourism helps to diversify tourism revenue streams, promote local employment creation and stimulate investment in hospitality infrastructure. As travelers focus on longevity, preventive health management, stress reduction and customized experiences, wellness tourism is increasingly becoming a strategic pillar of global travel strategies. The integration of digital health, sustainable tourism models, wellness certification standards and growing consumer interest in transformational travel experiences are expected to influence the future growth of the market.

Global Wellness Tourism Market: Key Highlights

The Global Spa Services Market was valued at USD 102.50 billion in 2025, primarily driven by rising consumer spending on wellness, relaxation, and preventive healthcare services.

The market is projected to reach USD 301.00 billion by 2036, growing at a CAGR of 8.5% during 2026–2036, propelled by increasing wellness tourism, growing stress management awareness, and expanding luxury hospitality offerings.

North America leads the global market, supported by high disposable incomes, a mature wellness industry, and strong demand for premium spa experiences.

Hotel/Resort Spa dominates the spa type segment because of its integration with luxury hospitality, comprehensive wellness services, and growing popularity among leisure and business travelers.

Massage Therapies lead the service segment owing to their widespread adoption for stress relief, pain management, muscle recovery, and overall physical and mental well-being.

Women dominate the end-user segment, supported by higher utilization of beauty, wellness, and personal care services, along with increasing demand for holistic health and relaxation treatments.

Research Scope & Methodology

This study measures the global wellness tourism market by service types, travel purposes, and travel modes from 2026 to 2036. The analysis includes wellness-related transportation services, accommodation services, food and beverage services, wellness

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activities, retail spending, and tourism-related spending. The study analyzes demand trends across primary wellness travelers whose travel is driven primarily by wellness goals and secondary wellness travelers who include wellness experiences as part of wider travel itineraries. The study covers North America, Europe, Asia Pacific, and LAMEA. The study also measures wellness tourism adoption across domestic and international travel ecosystems. Some of the market participants covered in the report are hospitality operators, wellness resorts, destination management organizations, wellness activity service providers, tourism boards, travel service providers, wellness technology companies and integrated healthcare tourism operators.

The research methodology is a combination of primary and secondary research. Primary research includes interviews with tourism executives, hospitality operators, wellness service providers, travel agencies, destination authorities and industry experts. Secondary research includes publications by the World Tourism Organization, World Health Organization, Global Wellness Institute, national tourism authorities, government statistical agencies, hospitality associations and public financial disclosures. Market sizing is based on bottom up revenue modeling, which is supported by tourism expenditure data, analysis of visitor volume, service penetration rates and destination specific expenditure trends. Forecasting Macroeconomic Indicators Consumer Spending Patterns Wellness Economy Expansion Healthcare Expenditure Trends Tourism Infrastructure Investments Demographic Changes Competitive Benchmarking Strategic Positioning Service Innovation Geographic Expansion Partnership Activity among Leading Participants Data Triangulation Quantitative Datasets Expert Validation Regulatory Assessments Commercial Intelligence To ensure consistency, reliability and analytical rigor, we have employed a mix of quantitative and qualitative data validation, regulatory assessment, and commercial intelligence to support the forecast period.

Key Market Segments

By Service:

- In-country Transport
- Lodging
- Food & Beverage
- Wellness Activities
- Shopping
- Others

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By Travel Purpose:

Primary

Secondary

By Travel:

Domestic

International

Key Market Players

Hilton

Accor

Hyatt Corporation

Rancho La Puerta, Inc.

Marriott International, Inc.

Rosewood Hotels Group

Niraamaya Retreats

IHG Hotel & Resort

Omni Hotels & Resort

Four Seasons Hotels Limited

Industry Trends

The wellness tourism sector is going through a structural change as consumers increasingly see travel as a part of preventive healthcare. We are witnessing a move away from the traditional spa-only offering towards holistic wellness ecosystems that integrate physical fitness, nutritional counseling, mental wellness programs, sleep optimization, stress management, and personalized health assessments. This evolution is contributing to higher average visitor spend and creating opportunities for service differentiation for operators.

An important industry trend is the integration of digital health. Wearable devices, wellness apps, biometric monitoring systems and personalized wellness platforms are increasingly being integrated into travel experiences. Travelers are seeking measurable health outcomes rather than passive leisure experiences. Hospitality providers are responding with data-driven wellness programs designed to meet individual health goals.

Mental wellness tourism is gaining more traction. Rising workplace stress, the pressures of urban living and a growing awareness of mental health have fuelled demand for mindfulness retreats, meditation programs, digital detox experiences and nature-based wellness destinations. Global mental health conditions impact hundreds of millions of people, according to WHO estimates published in 2024, driving demand for wellness-focused travel experiences that emphasize emotional resilience and recovery.

Sustainability is increasingly tied to wellness tourism positioning. Consumers are increasingly linking personal wellbeing with environmental stewardship. Wellness destinations are investing in renewable energy systems, local sourcing strategies, sustainable construction methods and biodiversity preservation initiatives. These investments improve brand differentiation and match evolving traveler preferences.

Medical wellness convergence opens additional pathways for growth. Preventive diagnostics, longevity care, rehabilitation programs, nutritional medicine, and holistic therapies are being incorporated into wellness tourism offerings. This convergence appeals to higher-spending travelers seeking measurable health improvements as well as leisure experiences.

Personalization capabilities are rapidly evolving. Artificial intelligence tools, health assessments, behavioral analytics, and digital wellness platforms allow operators to customize travel experiences based on health and wellness goals, lifestyle preferences, and demographic profiles. Personalized service delivery improves customer satisfaction and underpins premium pricing strategies.

Luxury hospitality operators are stepping up their wellness investments. Wellness resorts, integrated wellness facilities, sleep-focused accommodations and specialized wellness packages are emerging as important differentiators in competitive tourism markets. High net worth travelers are prioritizing wellbeing outcomes more in their destination choices

Corporate wellness tourism is emerging as an important demand category. Organizations are investing in wellness retreats, leadership resilience programs, mental health initiatives and employee wellbeing experiences. These programs support workforce engagement objectives while generating additional revenue streams for wellness destinations.

Regional governments are increasingly supporting wellness tourism development. National tourism strategies across Asia Pacific, Europe and the Middle East are featuring wellness tourism as a high-value segment with potential to attract premium visitors and generate year-round tourism activity.

Cross-sector partnerships are driving innovation. Collaboration between healthcare providers, hospitality operators, technology companies, insurance organizations and tourism authorities is creating integrated wellness ecosystems that enhance customer value propositions and strengthen destination competitiveness.

Market Determinants

Rising Wellness Spending Patterns: Consumer expenditure on wellness products and services continues expanding globally. According to the Global Wellness Institute, the wellness economy exceeded USD 6.3 trillion in 2023. Higher spending on preventive health, fitness, nutrition, and mental wellbeing directly increases demand for wellness-oriented travel experiences. Tourism operators benefit from increased willingness to pay for premium wellness services, creating opportunities for revenue expansion and differentiated hospitality offerings.

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Expanding Preventive Healthcare Adoption: Healthcare systems increasingly emphasize disease prevention and lifestyle management. According to WHO 2024 estimates, noncommunicable diseases account for approximately 74% of global deaths. Growing awareness encourages consumers to pursue wellness-focused travel experiences supporting healthier lifestyles. Wellness tourism providers capitalize on this trend through fitness retreats, nutritional programs, stress management services, and holistic wellbeing offerings.

Growth in Mental Wellness Demand: Mental wellbeing has become a significant consumer priority. According to WHO reports published in 2024, anxiety and depression continue affecting large populations globally. Demand for mindfulness retreats, wellness escapes, meditation programs, and nature-based tourism experiences has increased substantially. This trend expands customer segments and supports premium service positioning across wellness tourism destinations.

Digital Wellness Ecosystem Expansion: Technology adoption is enhancing accessibility and personalization across wellness tourism services. Wearable devices, digital health platforms, and wellness applications are increasingly integrated into travel planning and service delivery. Enhanced personalization improves customer outcomes and increases repeat visitation rates. Operators leveraging digital wellness capabilities strengthen competitive positioning and customer engagement.

Economic Uncertainty Affecting Travel: Macroeconomic volatility presents challenges for discretionary travel spending. Inflationary pressures and economic uncertainty can delay premium travel purchases, particularly within middle-income consumer segments. Wellness tourism operators may experience demand fluctuations during periods of reduced consumer confidence. Pricing sensitivity can affect profitability and capacity utilization across certain destinations.

High Service Delivery Costs: Premium wellness tourism experiences often require specialized staff, advanced facilities, wellness technologies, and high-quality accommodation infrastructure. Rising labor costs and operational expenditures can compress margins. Operators face ongoing pressure to balance service quality with affordability while maintaining competitive positioning within increasingly crowded tourism markets.

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Opportunity Mapping Based on Market Trends

Emerging Longevity Tourism Programs: Longevity-focused travel experiences represent a significant investment opportunity. Global populations continue aging rapidly. According to the United Nations, people aged 65 years and above reached approximately 857 million globally in 2024. Travelers increasingly seek programs focused on healthy aging, preventive diagnostics, nutrition optimization, and wellness interventions. Providers offering evidence-based longevity services can capture premium market segments with high spending potential.

Expansion Across Asian Destinations: Asia Pacific tourism markets continue expanding wellness infrastructure investments. According to UN Tourism data, international tourism arrivals across Asia and the Pacific demonstrated strong recovery through 2024. Rising middle-class populations, competitive pricing structures, and government tourism initiatives create attractive opportunities for wellness destination development. Investors benefit from favorable long-term demand fundamentals and expanding regional tourism capacity.

Digital Wellness Platform Integration: Digital wellness solutions create opportunities for enhanced customer engagement before, during, and after travel experiences. Consumers increasingly expect personalized health insights and measurable wellness outcomes. Operators integrating digital monitoring, health assessments, and personalized wellness programs can improve customer retention while creating recurring revenue opportunities beyond physical travel experiences.

Sustainable Wellness Resort Development: Sustainability-focused wellness resorts align with evolving consumer preferences and regulatory priorities. According to the International Energy Agency, renewable energy additions reached record levels during 2024. Wellness destinations adopting sustainable infrastructure, renewable energy systems, and responsible tourism practices can strengthen brand positioning, attract environmentally conscious travelers, and improve long-term operational efficiency.

Value-Creating Segments and Growth Pockets

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Lodging leads the wellness tourism service segment through premium accommodation spending and integrated wellness experiences.

By Service, the market is segmented into In-country Transport, Lodging, Food & Beverage, Wellness Activities, Shopping, and Others. Currently, lodging dominates the market with an estimated share of 46.8% in 2025. This dominance can be attributed to accommodation expenditure comprising the core of wellness travel budgets. Wellness resorts, destination spas, integrated retreat centers, and premium hospitality properties attract significant visitor spending. Established infrastructure, longer average stay durations, premium room pricing and bundled wellness packages also help generate revenues. Accommodation is the largest spending category in most international travel markets as per global tourism expenditure trends reported in 2024.

Wellness Activities are projected to achieve the highest CAGR of 14.7% through the forecast period 2026-2036. Consumers are shifting from passive leisure to transformative experiences. This shift is being driven by the rising demand for fitness programs, meditation retreats, therapeutic treatments, nutritional coaching, and wellness workshops. Although Lodging currently leads in market share, Wellness Activities are expected to gain momentum due to personalization trends, improved service differentiation, and increasing consumer focus on measurable wellness outcomes.

Secondary wellness travel dominates through the integration of wellness into leisure and business trips.

By Travel Purpose, the market is segmented into Primary and Secondary. Secondary accounts for the largest market share with an estimated 63.4% in 2025. Most travelers are combining wellness experiences along with broader leisure, business, or family travel as opposed to traveling solely for wellness purposes. This segment benefits from larger traveler pools, greater destination availability, and increased integration of wellness services into mainstream hospitality offerings. Primary wellness travel is expected to showcase the fastest CAGR of 13.9% during 2026–2036. The increasing consumer focus on preventive health, stress reduction, longevity, and mental wellbeing is underpinning dedicated wellness travel demand. Specialized wellness resorts, medical wellness programs, and immersive retreat experiences continue to attract higher-spending travelers seeking focused wellness outcomes.

Domestic travel leads the wellness tourism market through accessibility, affordability, and frequent regional travel.

Market segmentation by Travel, the market is segmented into Domestic and International. Currently, the Domestic Travel segment is dominating the market with an estimated market share of 58.6% in 2025. Domestic wellness tourism is benefited from lower travel expenses, better accessibility, less logistical complexity, and frequent repeat visits. Many travelers are increasingly leaning towards regional wellness

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destinations that offer convenience with personalized experiences.

International Travel is expected to register the fastest CAGR of 15.3% during 2026-2036. Growth is supported by improving air connectivity, expanding cross-border wellness destinations, favorable visa policies, and increasing interest in destination-specific wellness traditions. While Domestic Travel dominates today, International Travel is expected to accelerate as consumers seek differentiated wellness experiences that are not available within local markets.

Regional Market Assessment

North America leads the wellness tourism market through advanced hospitality infrastructure and high wellness spending.

North America is expected to lead the global wellness tourism market by capturing an estimated share of 35.9% in 2025. The region’s robust hospitality infrastructure, high wellness spend, strong inclination towards preventive healthcare, and mature wellness service ecosystems are some of the key factors supporting the growth of the market. The U.S. Travel Association states that the domestic travel expenditure has been steadily recovering throughout 2024. Growing awareness among consumers about mental wellness, fitness, nutrition, and lifestyle management is further bolstering demand. Availability of premium wellness resorts, luxury hospitality brands and integrated health tourism providers enhances regional competitiveness. Increasing corporate wellness initiatives and investment in personalized wellness technologies further boosts commercial expansion. Regulatory focus on consumer wellness and healthy living contributes to long-term market stability.

Europe strengthens its wellness tourism position through established spa traditions and sustainable destination development.

Europe remains a significant player in the wellness tourism market, due to its rich spa culture, heritage wellness destinations and strong focus on sustainability. Countries such as Germany, Switzerland, Austria and Italy remain popular with wellness tourists seeking therapeutic, recreational and preventive health experiences. Tourism activity across European destinations remained robust throughout 2024, according to Eurostat data. Investments in sustainable hospitality infrastructure and wellness-oriented destination development add to the market’s appeal. The region’s extensive transportation networks, premium accommodation capacity and growing demand for nature-based wellness experiences further enhance wellness tourism in the region. The region remains a significant destination for international wellness travelers seeking quality, authenticity and regulatory assurance.

Asia Pacific emerges as the fastest-growing wellness tourism market through tourism expansion and rising disposable incomes.

The Asia Pacific region is expected to register the highest CAGR of 15.8% during the forecast period from 2026 to 2036. The growth is being propelled by factors such as the rapid development of tourism infrastructure, the expanding middle-class populations, and rising disposable incomes. According to UN Tourism data, the Asia Pacific region has seen a strong rebound in tourism in 2024. Major countries including Thailand, India, Indonesia, Japan, and South Korea are investing heavily in wellness tourism infrastructure. These destinations offer traditional wellness practices, competitive pricing, and increasing international recognition, which further enhance their appeal. Government initiatives aimed at diversifying tourism and promoting wellness-centric destination branding are also contributing to positive growth prospects. Improved aviation connectivity and investments in the hospitality sector are positioning the Asia Pacific as a significant contributor to future growth.

LAMEA expands wellness tourism opportunities through hospitality investments and tourism diversification initiatives.

Opportunities abound in the LAMEA region, with tourism diversification strategies, investments in hospitality infrastructure and growing international visitor arrivals. Middle Eastern countries continue to make significant investments in premium tourism developments and wellness-oriented hospitality projects. Latin American destinations benefit from natural wellness assets, biodiversity and eco-wellness tourism opportunities. African markets are slowly expanding wellness tourism offerings through luxury safari wellness experiences and nature-based retreats. Tourism initiatives supported by governments, infrastructure modernization programs and increasing foreign investment are supporting market development. As wellness tourism becomes recognized as a high-value tourism segment, regional operators are expected to expand service offerings and destination capabilities throughout the forecast period.

Recent Developments

March 2025: Hilton announced expansion of wellness-focused hospitality offerings across selected luxury properties. The initiative strengthens premium wellness travel positioning and reflects growing consumer demand for integrated wellbeing experiences.

January 2025: Hyatt Hotels expanded its wellbeing portfolio through additional wellness programming across resort destinations. The development supports personalized wellness travel trends and enhances service differentiation.

September 2024: Accor strengthened wellness hospitality investments through expanded wellness resort experiences and lifestyle-focused accommodation concepts. The strategy aligns with rising demand for immersive wellness tourism offerings.

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June 2024: Marriott International enhanced wellness-focused guest experiences across multiple brands through fitness, nutrition, and mental wellbeing initiatives. The expansion reflects increasing integration of wellness services into mainstream hospitality operations.

Critical Business Questions Addressed

What is the long-term value creation outlook for the wellness tourism market?

The report evaluates market expansion potential, revenue opportunities, and structural demand drivers expected to influence growth through 2036.

Which factors will shape future market expansion?

Analysis covers preventive healthcare adoption, wellness spending trends, digital wellness integration, and evolving traveler preferences.

Which segments offer the strongest investment potential?

The study identifies leading revenue-generating segments and emerging growth pockets across services, travel purposes, and travel modes.

How will regional competitive dynamics evolve?

Regional assessments evaluate infrastructure readiness, tourism investments, policy support, and destination competitiveness.

What strategic actions should market participants prioritize?

The report highlights service innovation, sustainability integration, digital transformation, and premium experience development strategies.

Beyond the Forecast

Wellness tourism is increasingly converging with preventive healthcare, creating new business models that extend beyond traditional hospitality services.

Destinations capable of combining measurable wellness outcomes, digital personalization, and sustainable operations are likely to capture disproportionate value creation over the next decade.

Competitive advantage will increasingly depend on ecosystem partnerships connecting hospitality, healthcare, technology, and wellness service providers into integrated traveler experiences.

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