What is Wellness?

It’s all wellness!
What is Wellness?
Defining The Opportunity

- Types of Wellness Travelers
  - Primary
  - Secondary

- Where is the Market
  - Domestic & international
  - Leisure & business (and BLEISURE!)

- Who Can Drive Wellness Tourism
  - Direct
  - Indirect

Defining the New Era of Wellness Tourism: Trends and Best Practices for Stakeholders
## Defining The Opportunity

### Wellness Tourism Growth Projections, 2017-2022

<table>
<thead>
<tr>
<th>Region</th>
<th>Projected Expenditures (US$ billions)</th>
<th>Projected Average Annual Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>$241.7</td>
<td>$311.3</td>
</tr>
<tr>
<td>Europe</td>
<td>$210.8</td>
<td>$275.0</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>$135.7</td>
<td>$251.6</td>
</tr>
<tr>
<td>Latin America-Caribbean</td>
<td>$34.8</td>
<td>$54.7</td>
</tr>
<tr>
<td>Middle East-North Africa</td>
<td>$10.7</td>
<td>$18.7</td>
</tr>
<tr>
<td>Africa</td>
<td>$4.8</td>
<td>$8.1</td>
</tr>
<tr>
<td><strong>Total Wellness Tourism Industry</strong></td>
<td><strong>$639.4</strong></td>
<td><strong>$919.4</strong></td>
</tr>
</tbody>
</table>

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.
Defining The Opportunity

Secondary and Domestic Wellness Travel Lead In Trips and Expenditures

Arrivals/Trips
- Secondary Domestic: 74% (611m trips)
- Secondary International: 15% (129m trips)
- Primary Domestic: 9% (74m trips)
- Primary International: 2% (17m trips)

Receipts/Expenditures
- Secondary International: 30% ($191b expend.)
- Primary Domestic: 9% ($57b expend.)
- Primary International: 5% ($32b expend.)

Note: Figures may not sum to total due to rounding.
Source: Global Wellness Institute
Defining The Opportunity

Wellness Tourism Spending Premiums, 2017

An international wellness tourist spends 53% more than the average international tourist.

A domestic wellness tourist spends 178% more than the average domestic tourist.

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

Which of the following are your top motivators for travel? Please select your top two motivators.

- Relaxation: 60%
- Getting away from home: 50%
- Experiencing different cultures: 43%
- Enhancing relationships: 15%
- Self-discovery: 13%
- Meeting new people: 11%
- Wellness: 5%
- Other: 2%

N=1500
Source: Skift Research, U.S. Experiential Traveler Survey 2019 March 2019
Where Does Denver Play?

PRIMARY?
Where Does Denver Play?

SECONDARY
International Opportunities

Millennial and Gen Z travelers who have taken a wellness trip in the past 12 months

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>23%</td>
</tr>
<tr>
<td>UK</td>
<td>27%</td>
</tr>
<tr>
<td>Australia</td>
<td>26%</td>
</tr>
<tr>
<td>China</td>
<td>54%</td>
</tr>
<tr>
<td>India</td>
<td>59%</td>
</tr>
</tbody>
</table>

U.S. N=1046, UK N=509, Aus N=523, China N=1143, India N=1015
Source: Skift Research Millennial and Gen Z Traveler Survey 2019 August 2019
Airbnb Wellness Experiences Bookings Growth by Age 2017-2018

Source: Airbnb
Reported January 2019
Business Travel Opportunities

- 42% of business travelers incorporate wellness into their business trips (up 10% from prior year)

- Wellness travelers are more brand loyal and can differentiate hospitality.
  - Drives longer length of stay
  - Increases rate
  - Sleep is major factor in wellness

Source: GWI, Accor Hotels
Overall Wellness Trends

1. Wellness is Holistic (physical, mental, social)
2. Wellness can be integrated throughout the trip
3. It helps travelers maintain healthy routines
4. It extends to the community (sustainability, good neighbor)
5. It’s blurring lines (co-working spaces, Class Pass getaways)
6. It encourages partnerships
THANK YOU!