

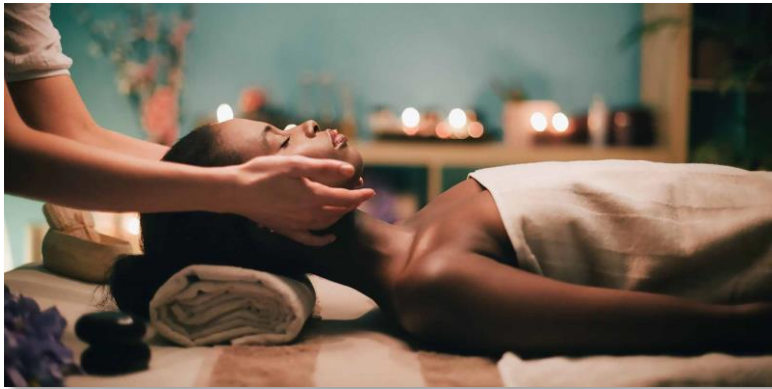
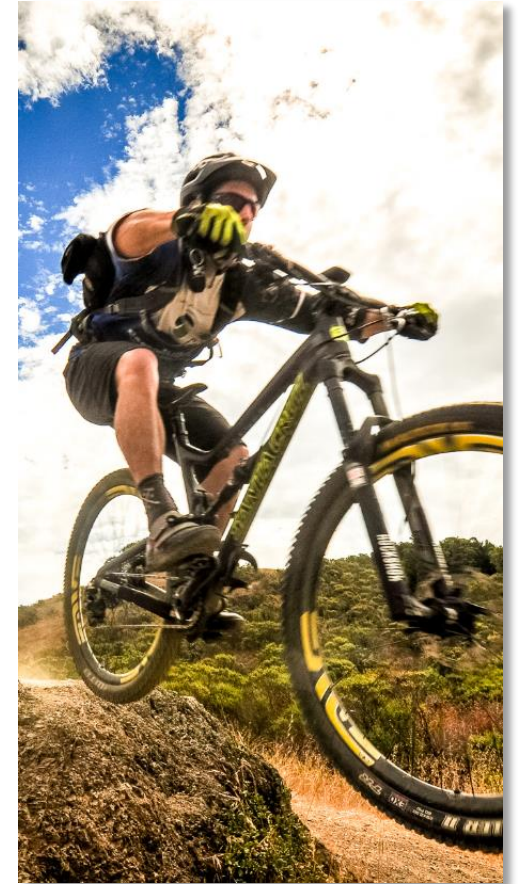


# Wellness, Anyone?

MARKETING ADVISORY COMMITTEE, JANUARY 9, 2020



# 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**



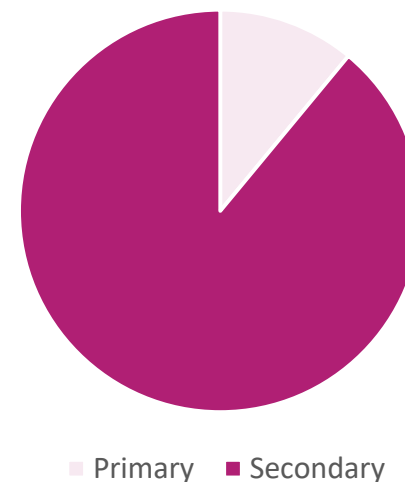
# Defining The Opportunity

## Wellness Tourism Growth Projections, 2017-2022

	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*

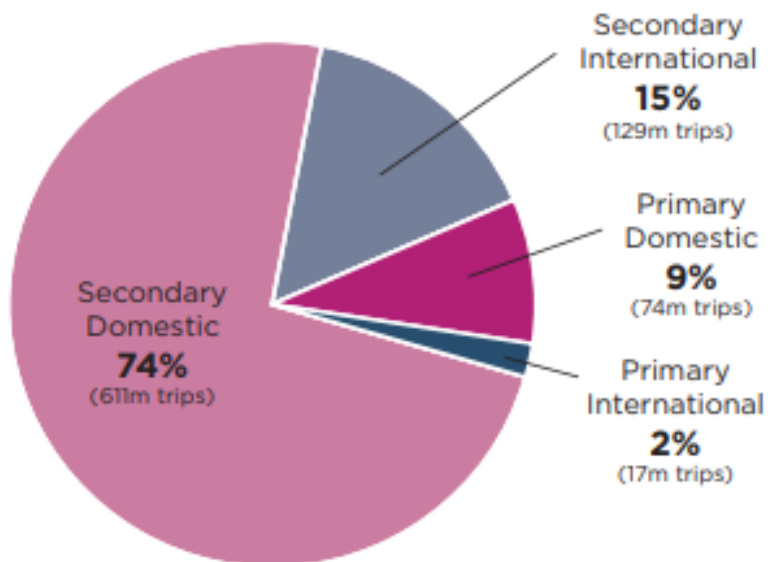
## Wellness Travelers



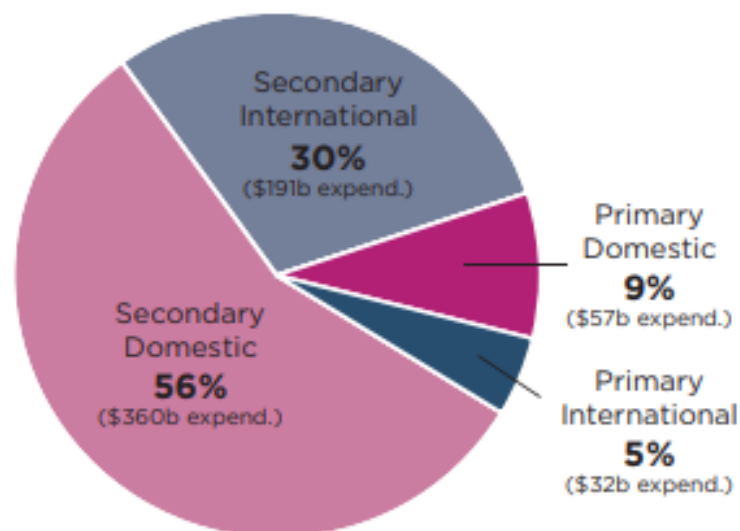
# Defining The Opportunity

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

**Arrivals/Trips**



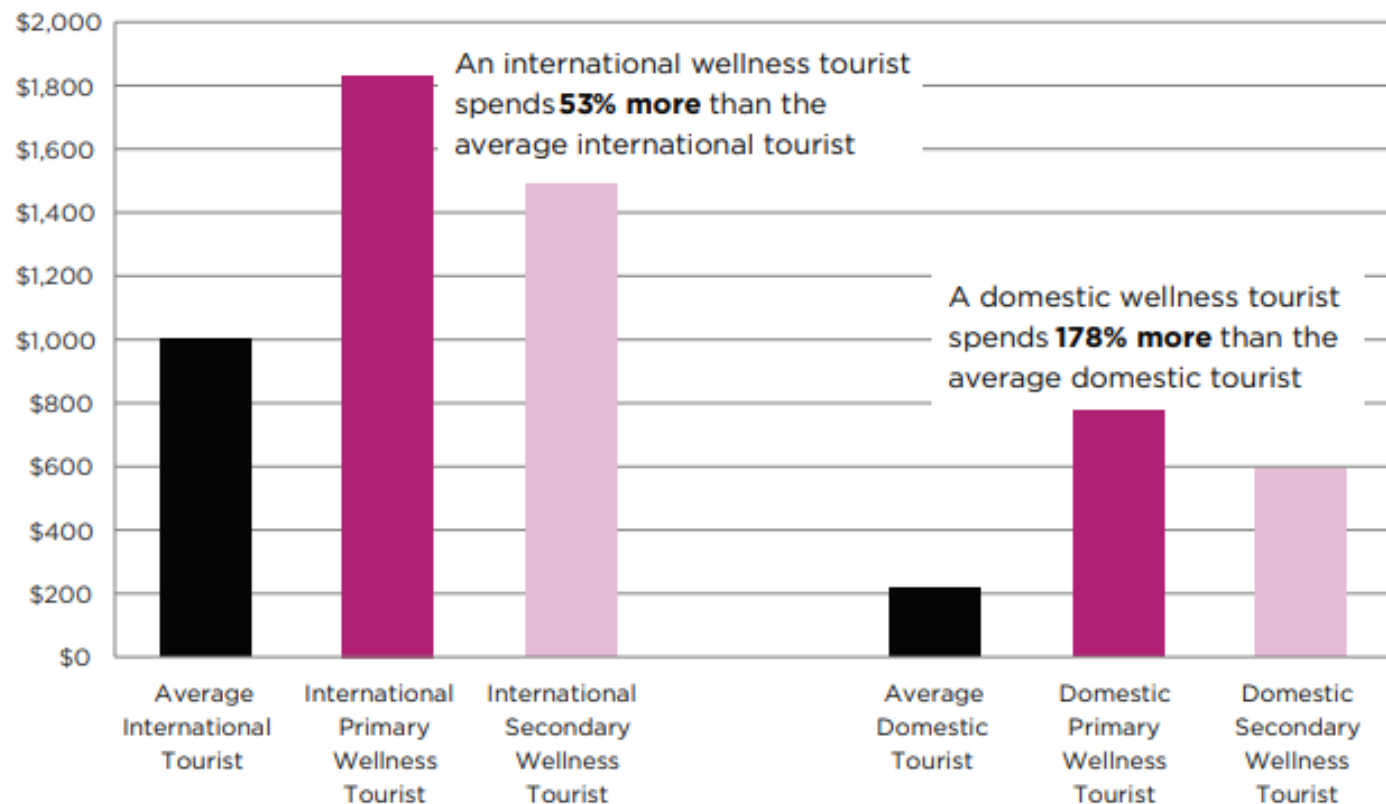
**Receipts/Expenditures**



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

# Defining The Opportunity

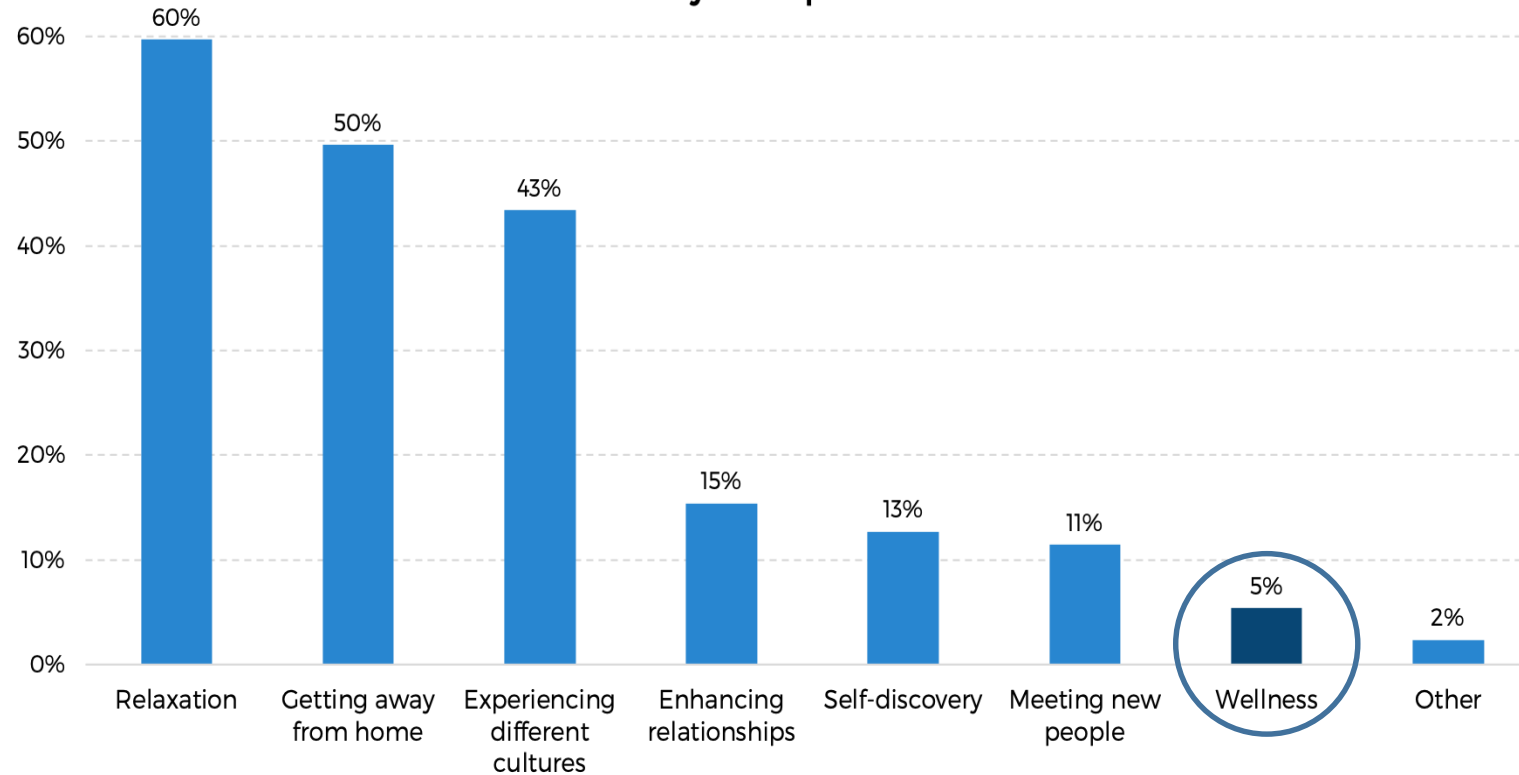
## Wellness Tourism Spending Premiums, 2017



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.



N=1300

Source: Skift Research, U.S. Experiential Traveler Survey 2019  
March 2019





## Where Does Denver Play?

**PRIMARY?**



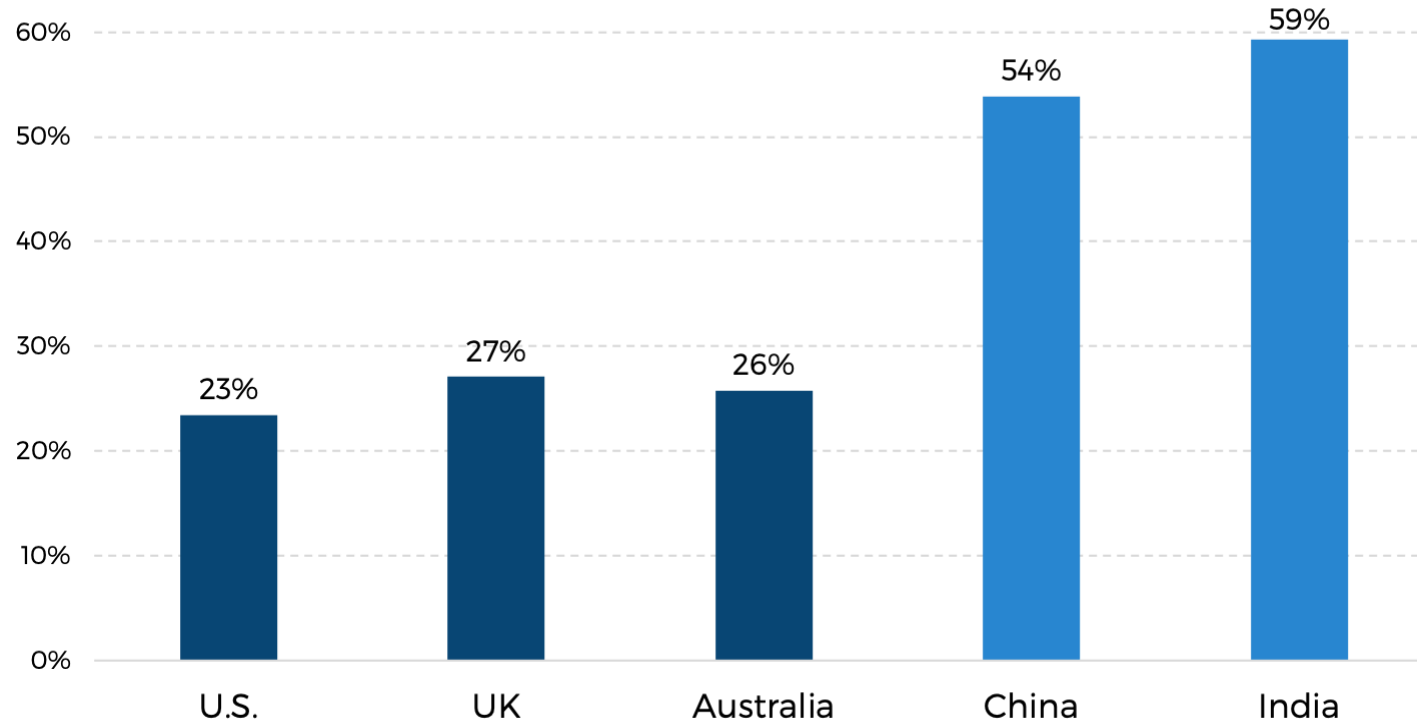
## Where Does Denver Play?

**SECONDARY**



# International Opportunities

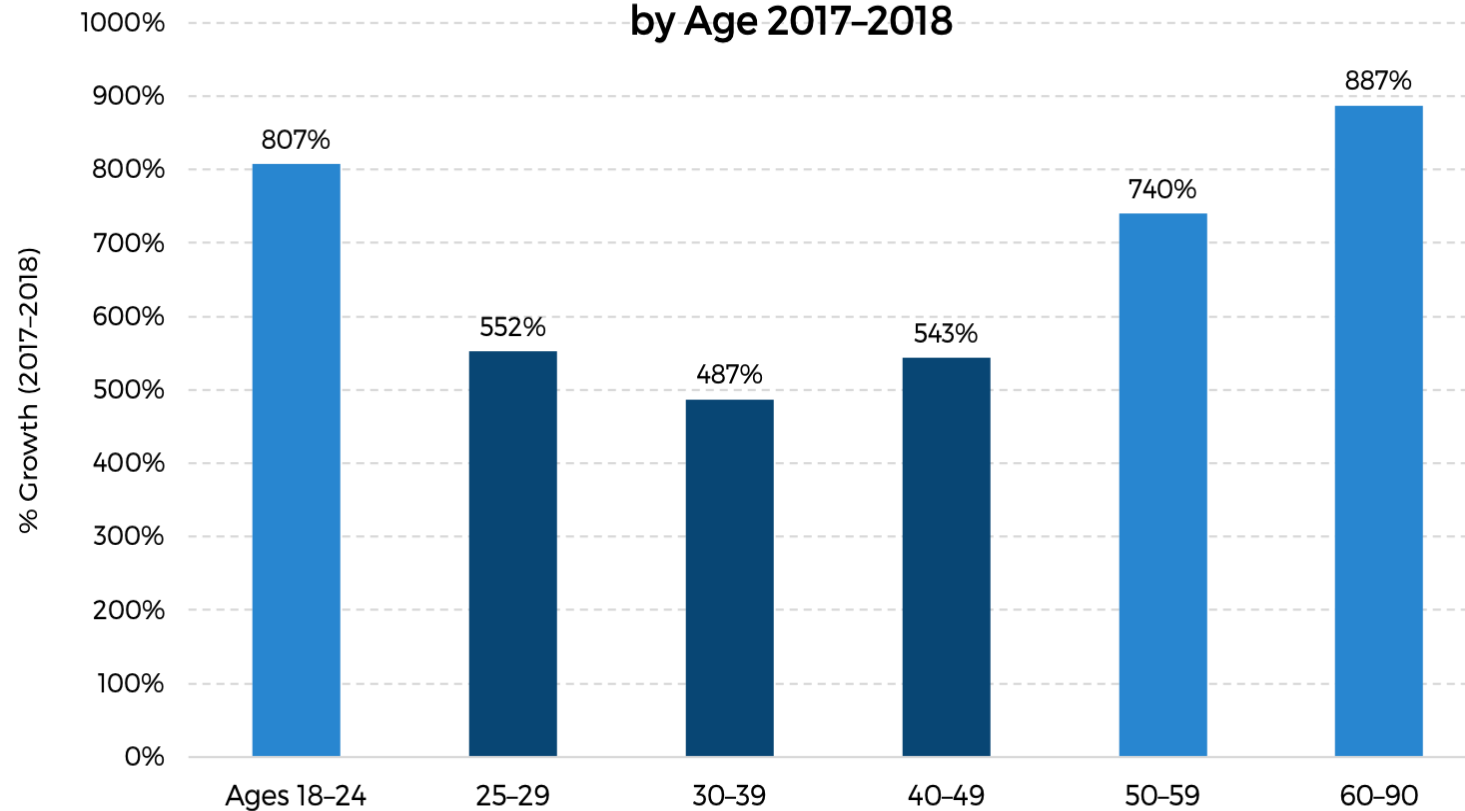
**Millennial and Gen Z travelers who have taken a wellness trip in the past 12 months**



*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*

# Generational Opportunities

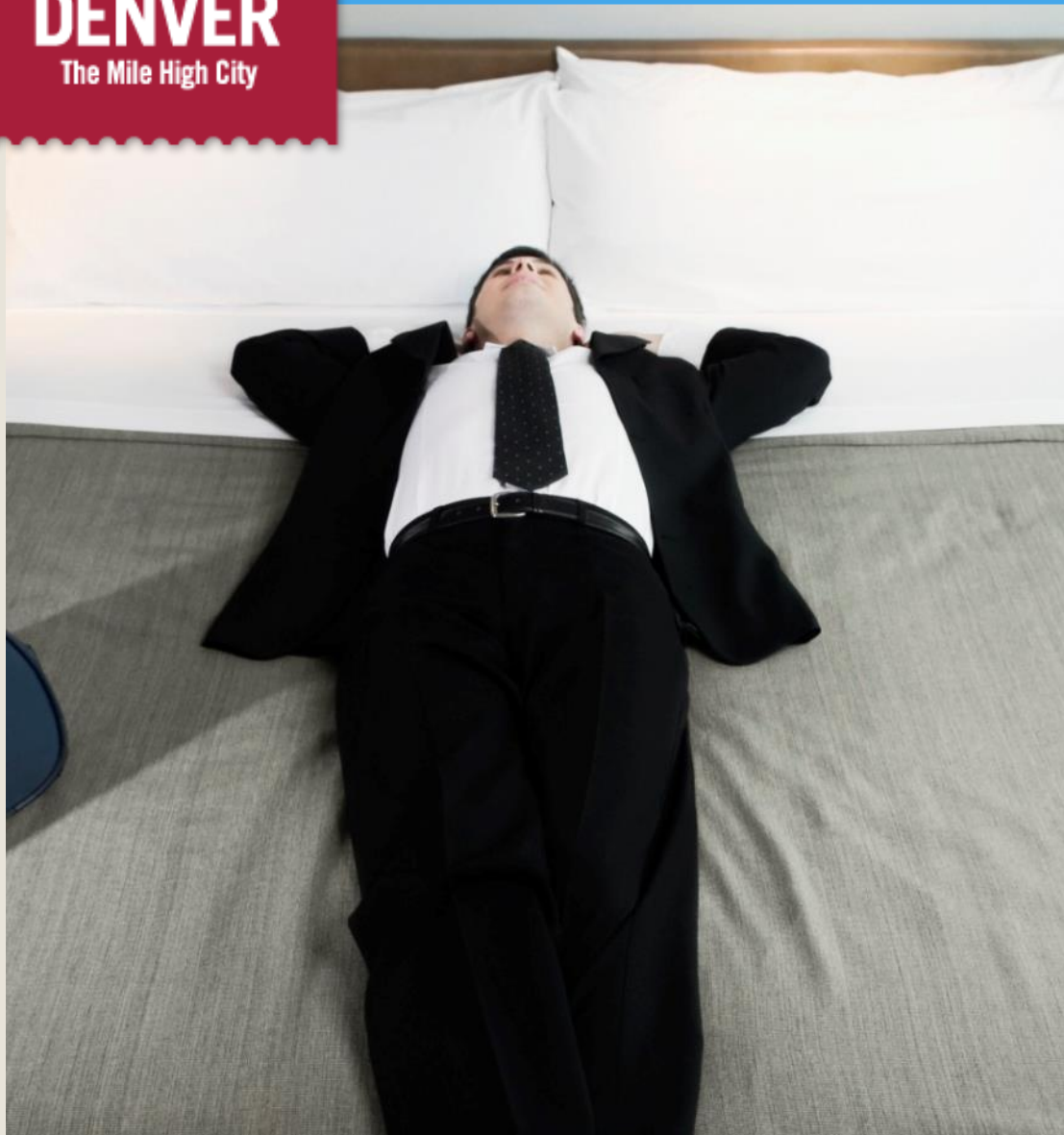
**Airbnb Wellness Experiences Bookings Growth  
by Age 2017-2018**



*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



**Defining the New Era of Wellness Tourism:  
Trends and Best Practices for Stakeholders**







# THANK YOU!

