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MARKET REPORT

Why Wellness Resorts Offer Healthy Investment Opportunities

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Today's travelers are prioritizing their health and wellbeing more than ever before, triggering the rapid development worldwide of dedicated resorts and driving mainstream hotels to expand their facilities. Hala Matar Choufany, president of HVS Middle East Africa, drills down into the numbers and explains why health-related resorts offer significant potential for regional developers.

The global consumer wellness economy reached USD 1.8 trillion in 2024, with related tourism contributing USD 815 billion, roughly 45 percent of the total. This market is among the fastest growing in the wellness sector and is projected to reach nearly USD 1.4 trillion by 2027. Recovery from the pandemic and increasing focus on health have fueled this rise, positioning wellness travel as a leading driver of hospitality innovation.

Global reach and Middle East focus

Health-related tourism has gained traction worldwide. North America remains the leading market, followed by Europe and Asia-Pacific, where historical healing traditions contribute to authenticity. Nature-oriented destinations in Latin America, South America and the Caribbean are also expanding their appeal.

The Middle East and North Africa region saw wellness travel spending surge from USD 2.8 billion in 2019 to USD 5.44 billion in 2022. In 2024, the combined wellness market of Saudi Arabia and the UAE was estimated at USD 1.9 billion. Forecasts suggest this figure will double by 2034, supported by government-backed initiatives.

Consumer trends and key drivers

Modern health-related tourism caters to physical, mental and emotional wellbeing, often emphasizing stress reduction, mindfulness and immunity support.

- Millennials and Gen Z are driving demand, normalizing therapy and seeking holistic experiences, such as yoga, digital detox and wellness education.
- Burnout and stress have created demand for structured recovery retreats offering sleep tech, stress diagnostics, hyperbaric oxygen therapy and infrared saunas.
- Travelers increasingly value authenticity and nature, preferring properties with local healing traditions, eco-sensitive design and immersive landscapes. Concepts like 'bringing nature indoors' through wood, natural light and botanical

integration are now central to wellness resort design.

Typologies unpacked

These offerings vary in format and depth of immersion. Popular options include:

- Spa hotels/wellness resorts – traditional luxury or upscale hotels with added wellness features such as spas, yoga, fitness facilities and healthy dining. Services are often à la carte.
- Destination spas – purpose-built immersive resorts offering multi-day all-inclusive programs. Packages combine accommodation, healthy meals, fitness, therapies and mindfulness sessions.
- Health/medical spas – offer clinical treatments under medical supervision, including diagnostics, IV drips or longevity therapies.
- Specialized retreats – these focus on specific goals, such as yoga, meditation or fitness bootcamps. They tend to be more structured and minimalist.

Programs vary in intensity, offering 1–3 health-related sessions per day, based on guest preferences.

Pricing and stay duration

These resorts typically command premium pricing and encourage longer stays than conventional hotels. Guests typically stay 7-10 nights and bookings are often all-inclusive.

- Mid-range retreats cost around USD 1,500–3,000 per week, covering accommodation, meals and a set wellness itinerary.
- Luxury offerings exceed USD 5,000 per week and ultra-luxury options can reach USD 10,000+, offering private villas, bespoke programs, nutrition plans and world-class spa access.

Scale and facilities

Most health-related resorts maintain smaller footprints to enhance intimacy, with many hosting fewer than 40 rooms. Even larger operators, such as Six Senses and Four Seasons, often cap wellness-focused inventory below 100 rooms.

Key facilities typically include:

- Spa complexes (steam, hydrotherapy and massage).
- Fitness and yoga studios.
- Outdoor activities (hiking, paddleboarding and meditation gardens).
- Wellbeing workshops (nutrition, mindfulness and sleep coaching).
- Organic and detox-focused dining.
- Optional medical services (lab tests and longevity diagnostics).

The design prioritizes calm, nature and sensory comfort, often through open layouts, local materials and serene landscaping.

Leading global brands

Health-related hospitality is being shaped by a mix of dedicated operators and global hotel chains. Key players include:

- Canyon Ranch (USA) – a pioneer in immersive health retreats.
- Miraval (US, Hyatt) – offers all-inclusive escapes with a psychological wellness angle.
- Six Senses (global, IHG) – known for sustainable, experience-led wellness and aims to reach 60 resorts by 2030.
- COMO Shambhala (Asia-Pacific) – combines a holistic approach with luxury.
- Chiva Som (Thailand) – blends advanced wellness science with hospitality.
- Rancho La Puerta (Mexico) – offers long-standing fitness and healing retreats.
- Ananda in the Himalayas (India) – merges Ayurvedic traditions with a high-end holistic health-focused approach.

Large hotel groups are now scaling their health-related offerings. In the Middle East, wellness is increasingly embedded within luxury resort developments, often aligned with national tourism visions.

Wellness resorts in the Middle East and Africa

- Zulal Wellness Resort by Chiva-Som (Qatar) – the region's largest holistic resort, blending traditional Arabic and Islamic medicine with modern practices.
- Six Senses Zighy Bay (Oman) – a luxury beachfront sanctuary with tailored health-related services.
- Six Senses Shaharut (Israel) – a desert-based approach built around sustainability and wellness.
- Habitas AlUla (Saudi Arabia) – nature-focused, community-driven retreat in a culturally rich setting.
- Banyan Tree AlUla (Saudi Arabia) – combines Arabian wellbeing traditions with luxury.
- Al Maha (UAE) – offers an immersive desert holistic health-related approach within a nature reserve.
- One&Only One Za'abeel (UAE) – features the award-winning Longevity Hub by Clinique La Prairie.
- Anantara Al Jabal Al Akhdar (Oman) – offers elevated canyon views and tailored programs.
- Keriftu Resorts (Ethiopia) – a local luxury chain blending a holistic, health-related approach with cultural design.
- Serena Hotels (East Africa) – operates wellbeing offerings across Kenya, Tanzania and Uganda.

Profitability and performance

Wellness resorts frequently outperform traditional hotels in RevPAR and profitability due to:

- Longer average stays and stronger midweek occupancy.
- Higher guest spend through all-inclusive packaging.
- Robust ancillary revenues from health-related services and retail.

Spa and holistic wellbeing services can represent 30–50 percent of total revenue, compared to just 7–10 percent at standard luxury hotels. They may well have higher operational costs, such as therapists, nutritionists and related infrastructure. However, margins often fall within 15-25 percent, matching or exceeding those of traditional upscale resorts.

Potential for strong returns

The rise of wellness resorts marks a significant evolution in global travel preferences, where health, mindfulness and sustainable living have become key decision drivers. As consumers increasingly prioritize holistic wellbeing over traditional luxury, hospitality providers are responding with purpose-built environments that blend nature, culture and science to promote physical and emotional health. That segment's impressive growth trajectory, further supported by demographic shifts and lifestyle changes, suggests this tourism segment is not a trend but a long-term transformation of the travel experience.

For developers and operators, this presents a compelling opportunity to tap into a high-yield, resilient market segment. In regions like the Middle East, where tourism diversification is a policy priority, wellness-focused offerings can deliver strong returns while aligning with national development goals.

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