



**MABRIAN**

# **Wellness Tourism Global Outlook 2022**

**Mabrian Technologies**  
**October 2022**



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- Key Take-aways
- Global Growth Trends
- Wellness Tourism Flows
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# Mabrian provides answers to key questions

In 6 main areas of destination management and marketing by using Big Data

## Travel Intelligence



**Demand & Targeting**



**Air Access to Destination**



**Branding & Communication**



**Client Experience**



**Destination Benchmarking**



**Tourism Sustainability**

Strategic and operational planning

Monitoring of results

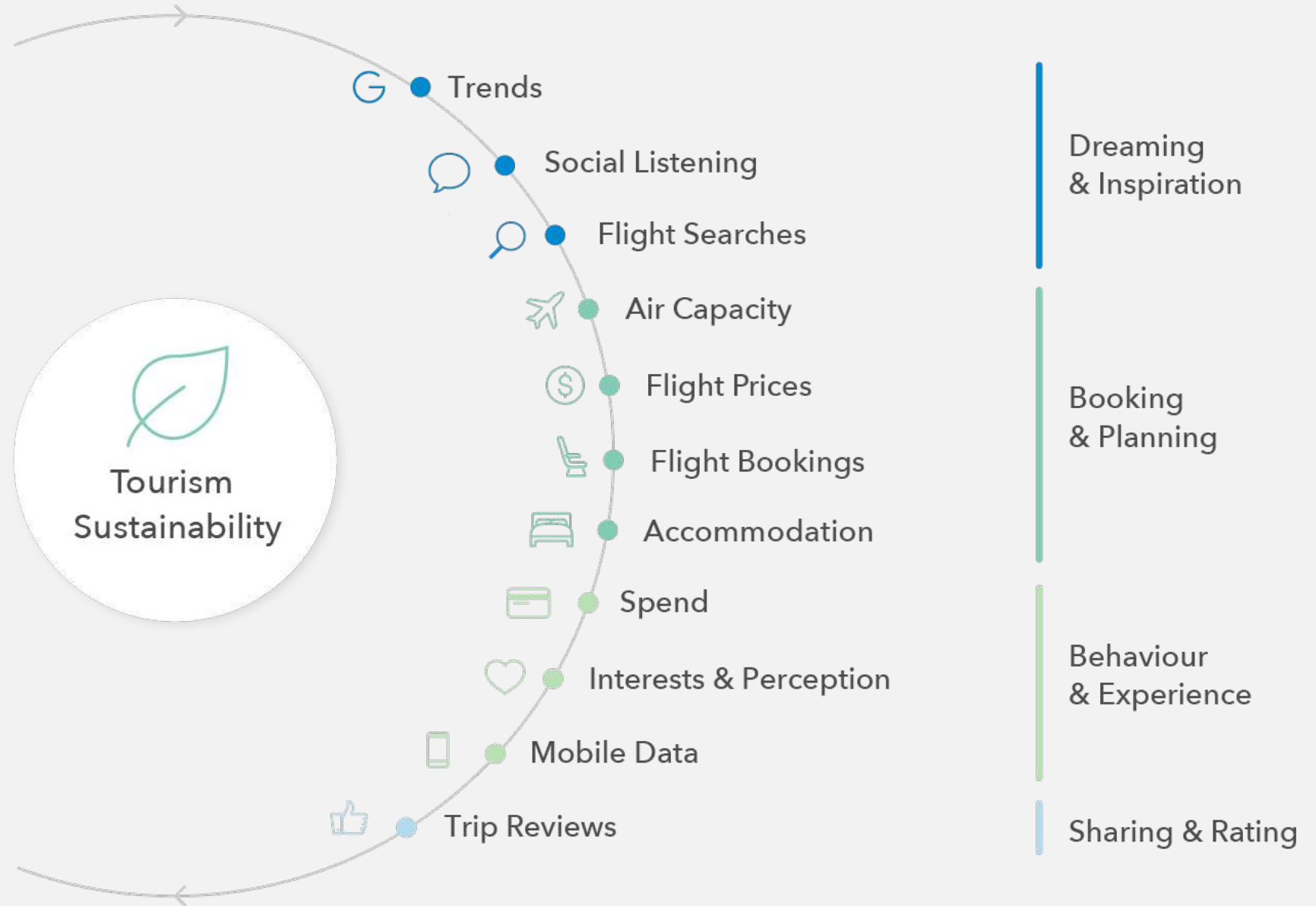


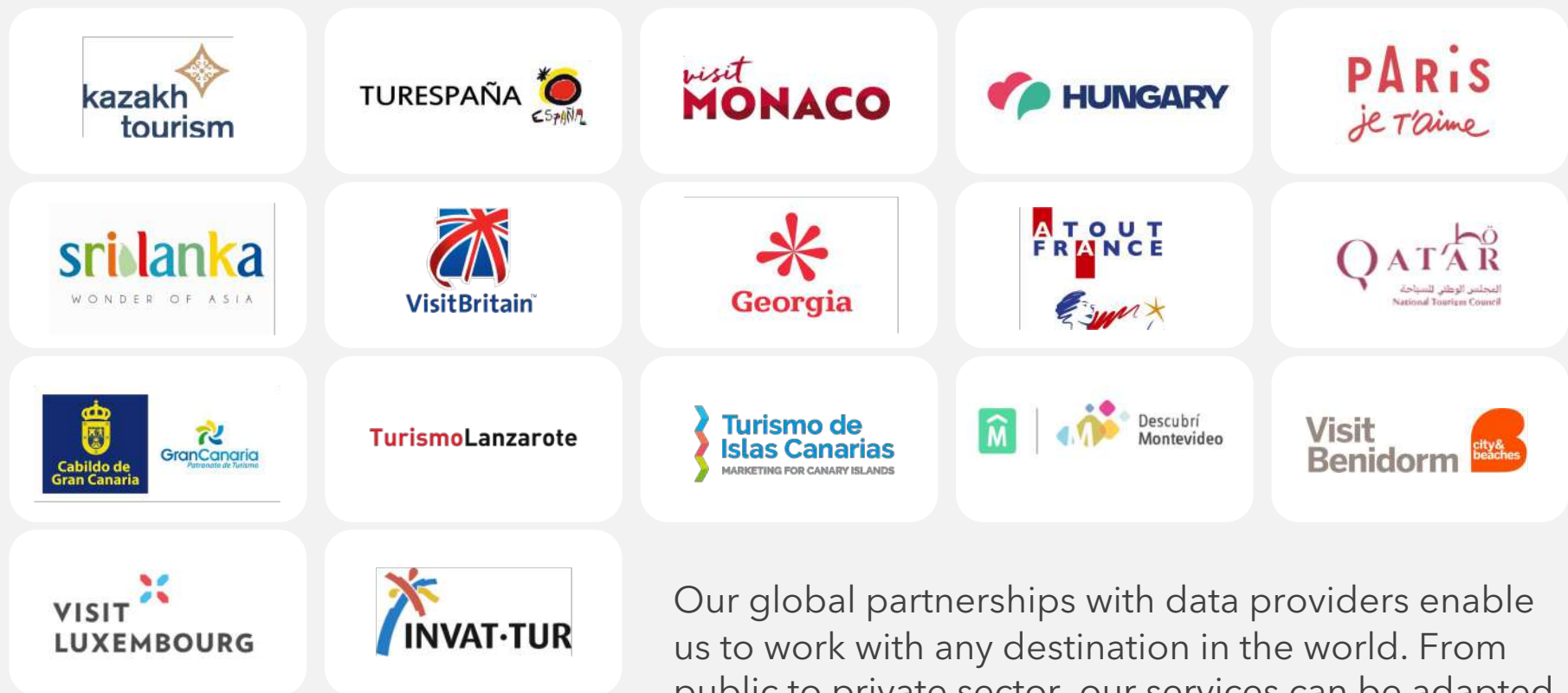
# Multiple data analysis for a holistic view

We observe and record visitors' behaviour throughout all decision phases.

**Pre- During- Post-Trip**

From the inspirational moment for the trip, through flight searches and price comparison, flight bookings, all the way to behaviour and spend patterns at destination.





Our global partnerships with data providers enable us to work with any destination in the world. From public to private sector, our services can be adapted to any organisation size: National, Regional and Local Tourism Organisations, Hotel Chains, Airlines, Investors, etc.



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## Wellness tourism is gaining traction globally whilst the SPA segment declined during the pandemic

1

### Wellness gains traction amongst travellers

The interest of travellers in wellness has shown a constant **positive growth** since 2018 with more people making conscious travel choices and decisions skewed towards the **quest for wellness**. The pandemic **enhanced the interest** for **open-air activities** such sports to the detriment of in-door activities such as visiting museums and exhibitions as travellers preferred avoiding crowded enclosed spaces

2

### The pandemic had a negative impact on the SPA segment

During the pandemic travellers preferred outdoor wellness activities such as **walking, hiking, kayaking & canoeing and bike tours** rather than visiting enclosed SPAs

3

### Walking wanderlust: activity with highest demand

There is a high demand for **walking tours** in urban areas as a need to break from everyday life, to see, visit and experience something different. This is a **light activity** which does not need any previous training and that can be performed by all types of travellers and therefore, it has a large audience

4

### Europe has nearly half of the world offering of wellness

Travellers are driven mainly to **Southern and Northern Europe for walking tours** in cultural sites. In Europe, its **Southern regions** have shown the highest increase in wellness **demand** in 2022. **Northern America and Southeast Asia** are the next most mentioned regions for wellness, respectively for outdoor activities in parks and for SPA services



## Wellness is likely to be boosted by tourism operators to increase destinations' sustainability perception

5

### Cusco: a worldwide renown destination for hiking

In 2022 Cusco was the most mentioned destination for hiking, which is one of the largest sectors of wellness. The hikes **from Cusco to the Machu Pichu** received the largest number of reviews on social medias worldwide

6

### Demanding customers show medium satisfaction levels with hotels with SPAs

Hotels which offer Spa services record a 70 out of 100 score of overall customer satisfaction. Hotels' **location and staff are the key value creators** whilst the rooms' fixtures and reception services are the pain points

7

### Thailand is a key wellness destination for the GCC markets

Wellness travel related activities have become an increasingly important driver also for the GCC markets. Even though these markets **increased** their preference for **outdoor wellness activities** during the pandemic, **Thailand, a SPA destination**, has remained their preferred wellness location

8

### Wellness plays a key role in the perception of sustainability

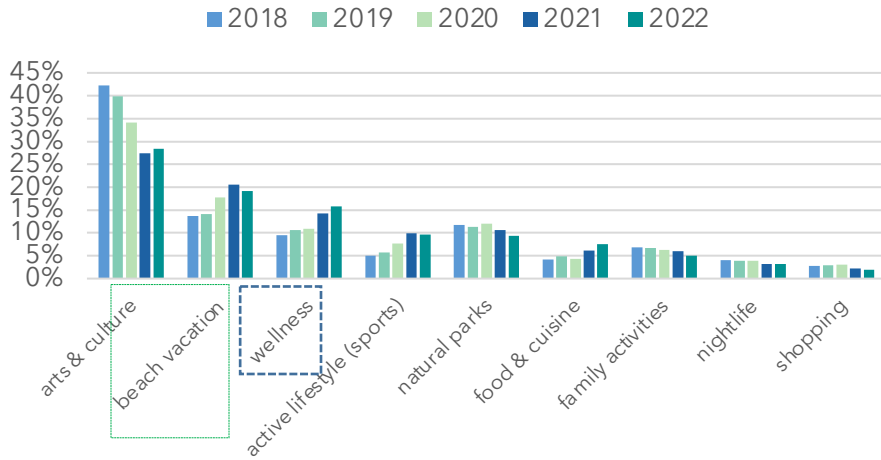
Themes related to wellbeing represent a third of all the mentions related to destinations' sustainability. The **perception** of the level of **sustainability** of a destination **depends** on its **wellness development**. Therefore, the tourism wellness offer is bound to surge in the future as sustainability becomes an increasingly important driver for travellers



# Wellness Evolution - Top 4 Wellness Regions

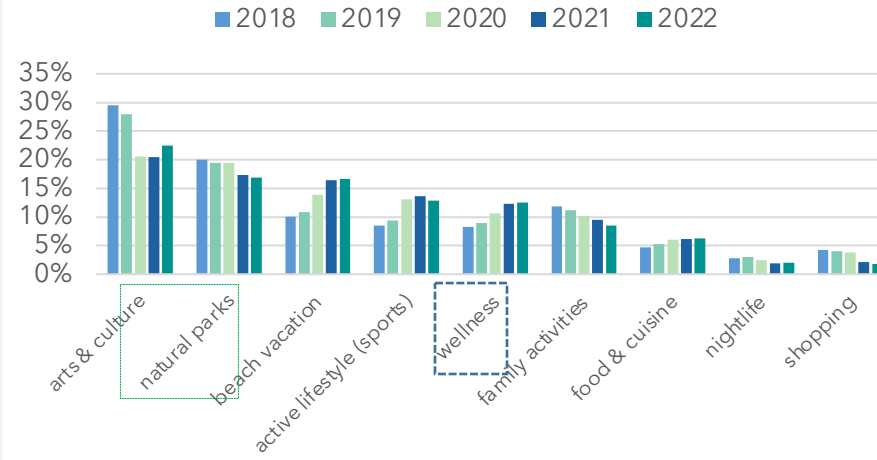
## SOUTHERN EUROPE - Key Tourist Products

Jan-Dec 2018-2021 and Jan-Sep 2022



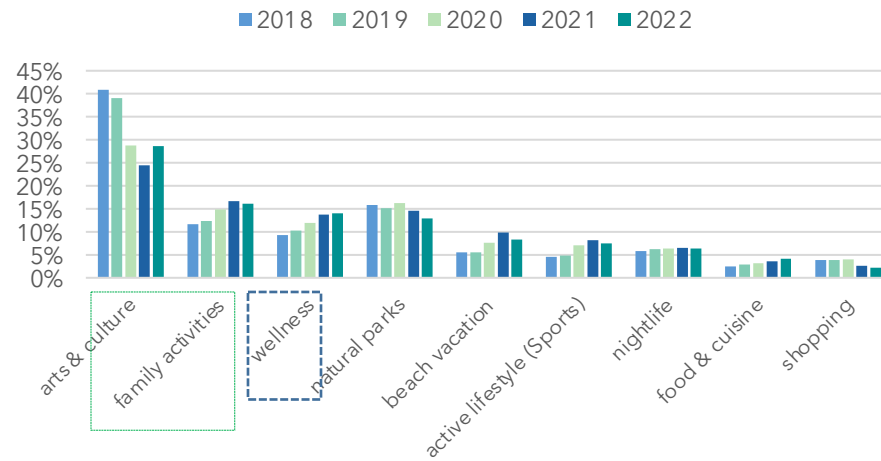
## NORTH AMERICA - Key Tourist Products

Jan-Dec 2018-2021 and Jan-Sep 2022



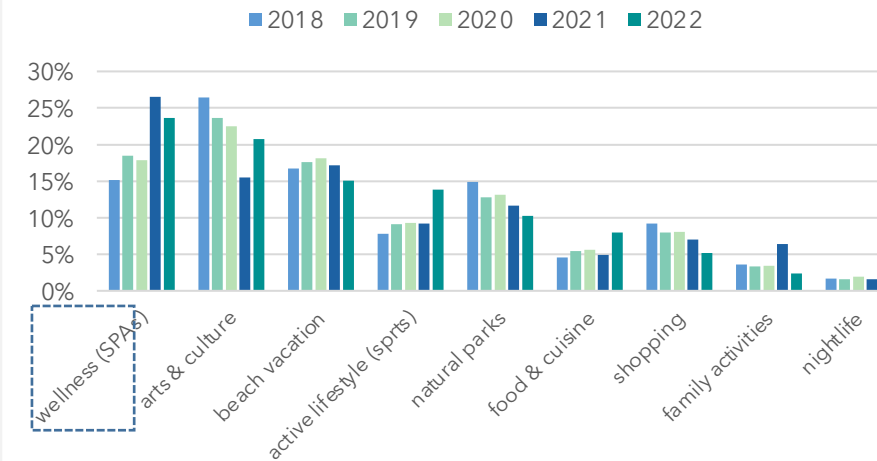
## NORTHERN EUROPE - Key Tourist Products

Jan-Dec 2018-2021 and Jan-Sep 2022



## SOUTH EAST ASIA - Key Tourist Products

Jan-Dec 2018-2021 and Jan-Sep 2022



**Wellness is likely to evolve differently in the top four wellness regions**

The availability of wellness more dynamic activities in nature are likely to spur in North America

Wellness activities at the beach such as yoga and open-air SPA to surge in Southern Europe where beach vacations are very sought after

Northern Europe to increase the offer of wellness activities to be enjoyed with the family

Spas to remain a key wellness service in South East Asia

Arts & culture is key in all regions - the offer of wellness activities related to this product such as walking to sightsee iconic sites is expected to widen

Source: TripAdvisor

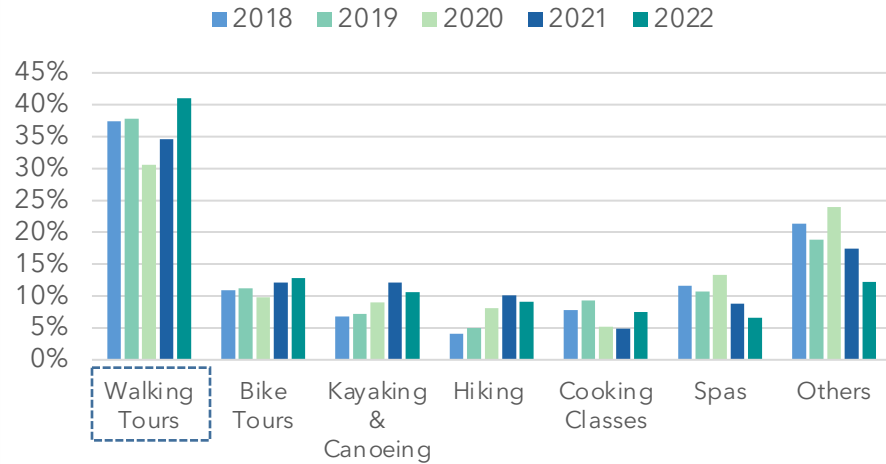
Surfing\* includes windsurfing and kitesurfing



# Wellness Activity Evolution - Top 4 Wellness Regions

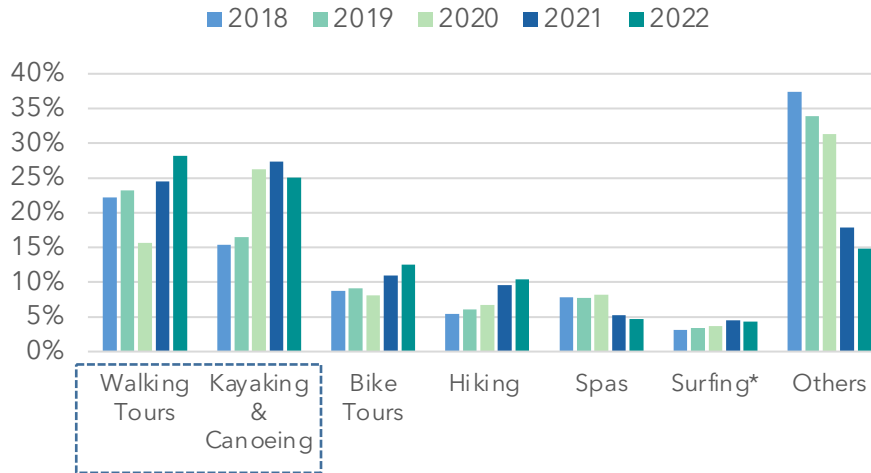
## SOUTHERN EUROPE - Key Wellness Activities

Jan-Dec 2018-2021 and Jan-Sep 2022



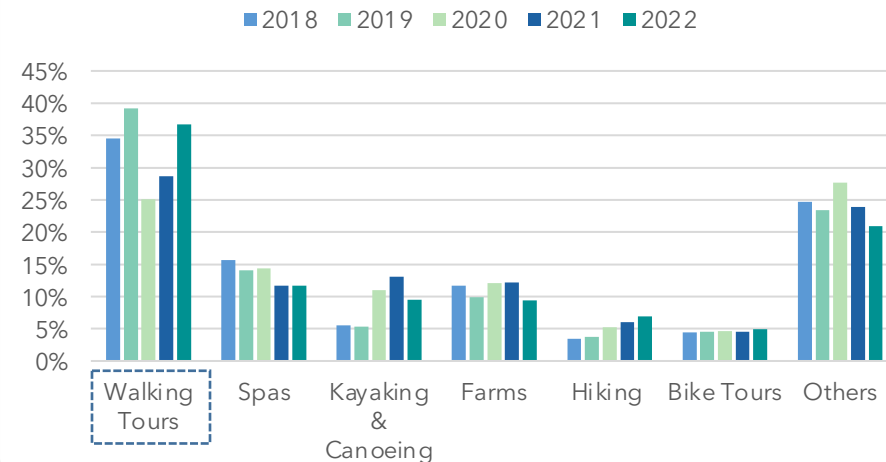
## NORTH AMERICA - Key Wellness Activities

Jan-Dec 2018-2021 and Jan-Sep 2022



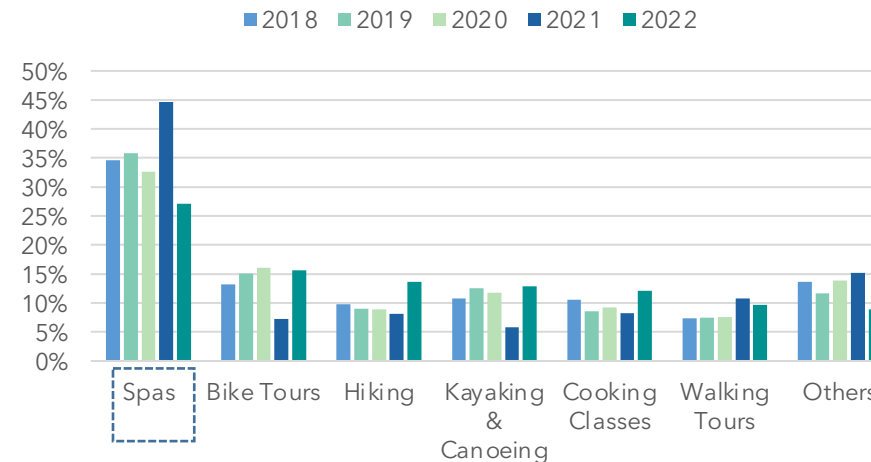
## NORTHERN EUROPE - Key Wellness Activities

Jan-Dec 2018-2021 and Jan-Sep 2022



## SOUTH EAST ASIA - Key Wellness Activities

Jan-Dec 2018-2021 and Jan-Sep 2022



**Walking Tours will continue being a key wellness activity in Southern and Northern Europe as tourists enjoy walking in cultural sites and cities**

In North America in addition to walking tours, mainly in cities, kayaking and canoeing, bike tours and hiking to increase their appeal due to the possibility of practicing these activities in the numerous natural parks

Travellers are expected to continue associating wellness to visiting SPAs in South East Asia

Spas are also likely to continue being sought after in Northern Europe, where hot saunas and baths are often visited due to the rigid climate, once the pandemic is over

Source: TripAdvisor

Surfing\* includes windsurfing and kitesurfing



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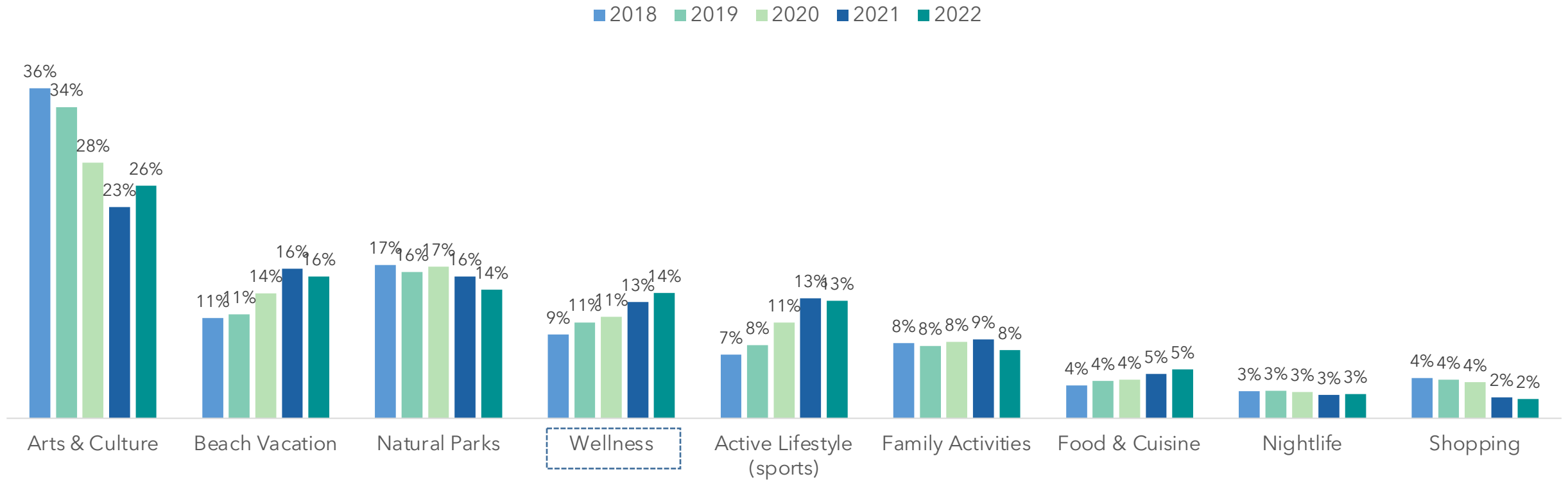
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# Wellness vs. Other Tourist Products

## Global Mention Share by Tourist Product

Jan-Dec 2018-2021 and Jan-Sep 2022, ALL DESTINATIONS, ALL MARKETS



**Globally, visitors have increasingly been looking to complement their trips with wellness activities. Wellness mentions have recorded a constant positive growth since 2018**

Source: TripAdvisor

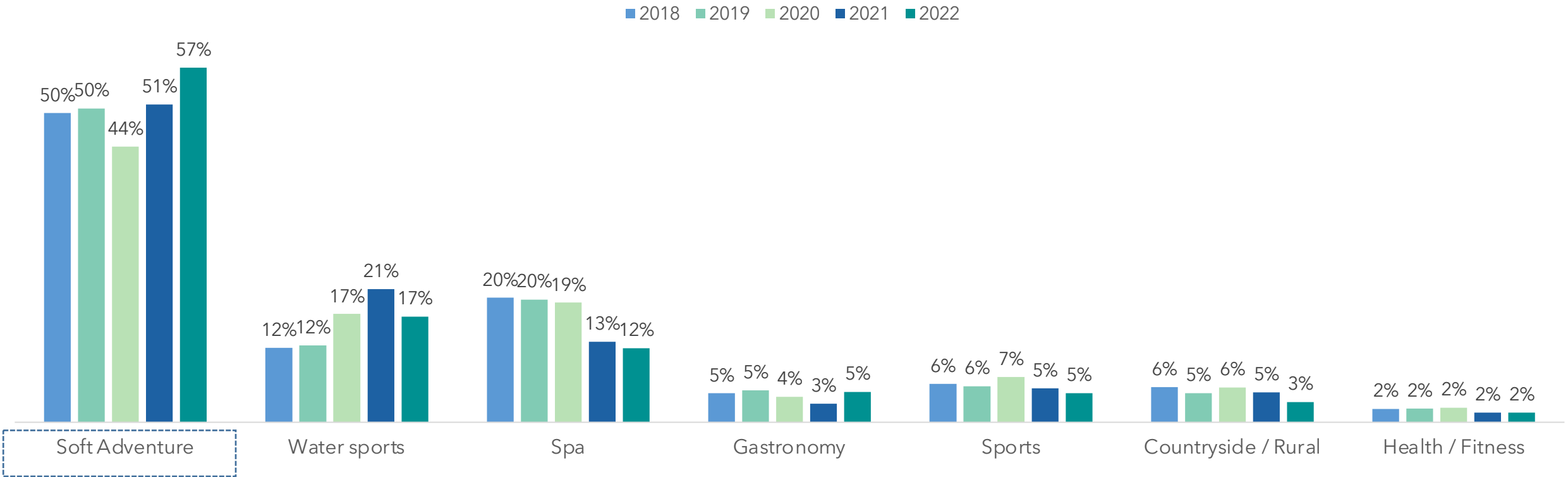
The pandemic changed visitors preferences across the globe. Travellers now prefer to engage in open air activities such as active lifestyle, sunbathing and to a lesser extent nature, rather than arts & culture in-door attractions



# Wellness Sub-Products

## Share of Mentions by Wellness Sub-Products

Jan-Dec 2018-2021 and Jan-Sep 2022 ALL DESTINATIONS, ALL MARKETS



**Within the wellness tourist product, travellers prefer engaging in not too dynamic activities such as Soft Adventure which includes activities that can reach to large audiences such as walking, hiking and biking**

*Source: TripAdvisor, data based Global Destinations*

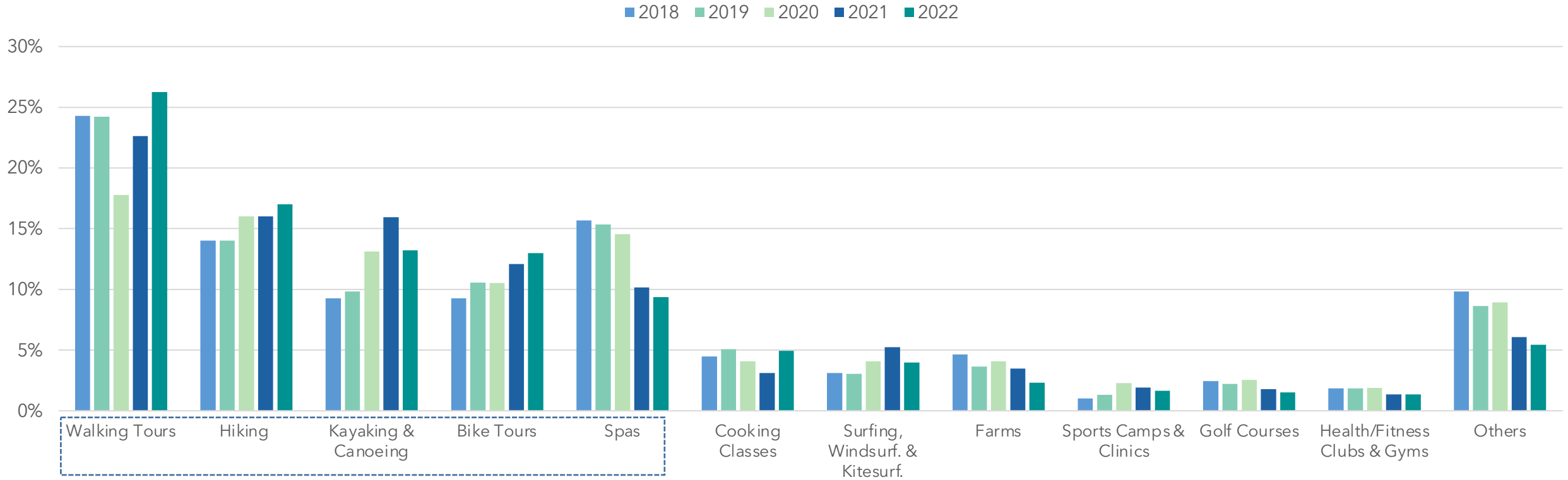
Water sports such as kayaking, canoeing and surfing have gained traction with the pandemic, probably because these sports can be practiced alone and in the open-air. On the contrary visiting SPAs has shown a declining trend after COVID-19 as travellers preferred staying outdoors



# Wellness Activities

## Share of Mentions by Wellness Activities

Jan-Dec 2018-2021 and Jan-Sep 2022 ALL DESTINATIONS, ALL MARKETS



**Walking Tours are by far the preferred wellness activity with their appeal increasing in 2022. Walking does not require any particular training, it is performed outdoors, it is usually relaxing and it can complement any type of trip, both cultural and more adventurous**

*Source: TripAdvisor, data based Global Destinations*

Hiking & Camping Tours have seen a surge in interest as staying outdoors and in contact with nature counterbalances city-based sedentary working life-style

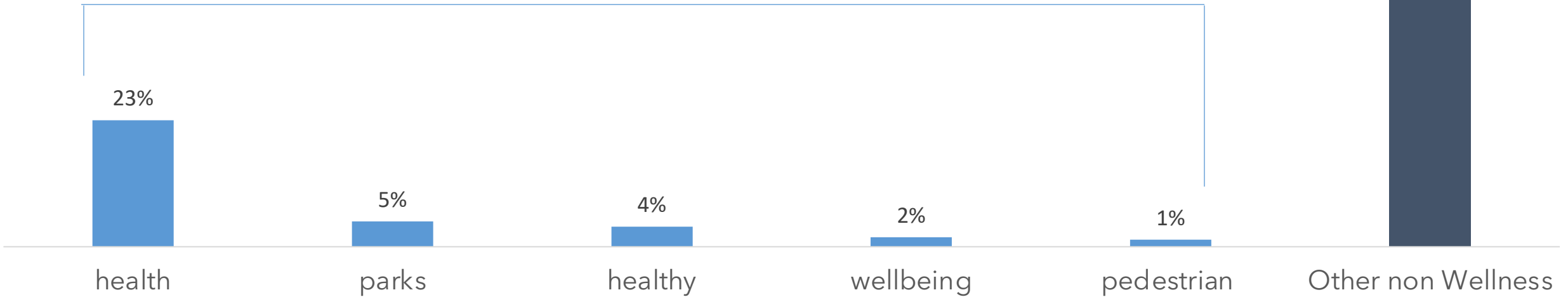


# Destination Sustainability Perception and Wellness

## Mention Share by Sustainability Themes related to Wellness

Jan-Dec 2021

34% of all mentions about sustainability relate to wellness themes



**A third of mentions related to the sustainability perception of destinations regard wellness themes; therefore, destinations are expected to increase their wellness offer to improve their sustainability perception**

Source: Instagram, TripAdvisor, Twitter

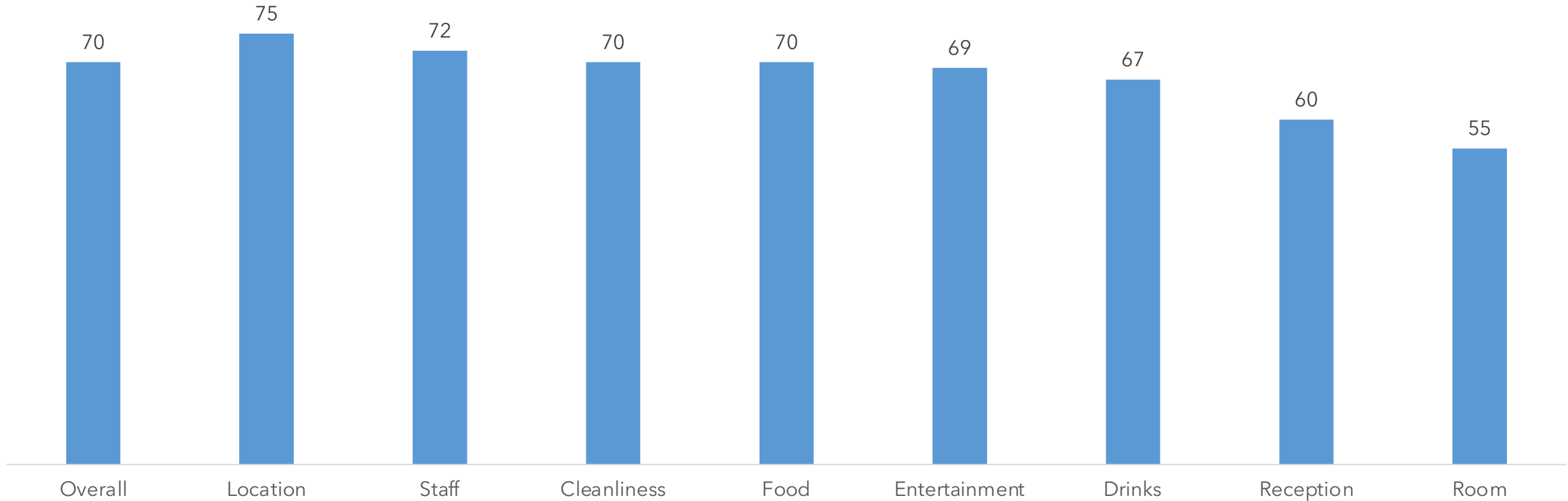
Data based on the following destinations:  
Barcelona, Berlin, Costa Rica, Dubai,  
Hungary, Lloret de Mar, Madrid, Menorca,  
Paris, Rome, Saudi Arabia, Sevilla, Vienna



## Satisfaction with hotels that offer wellness services

### Satisfaction Level with Hotel Services in Hotels offering SPA services

Jan-Sept 2022



**Medium-high satisfaction with Hotels offering SPA services as customers are very demanding. Value creators are the hotels' good locations and their well-trained staff**

Visitors are not very satisfied with the rooms' fixtures of these types of hotels

*Sources: Booking.com, Expedia.com, TripAdvisor*

*Satisfaction levels from 0 to 100 where 100 is excellent and 0 is extremely poor*

*Hotels which have the word "SPA" in their names*



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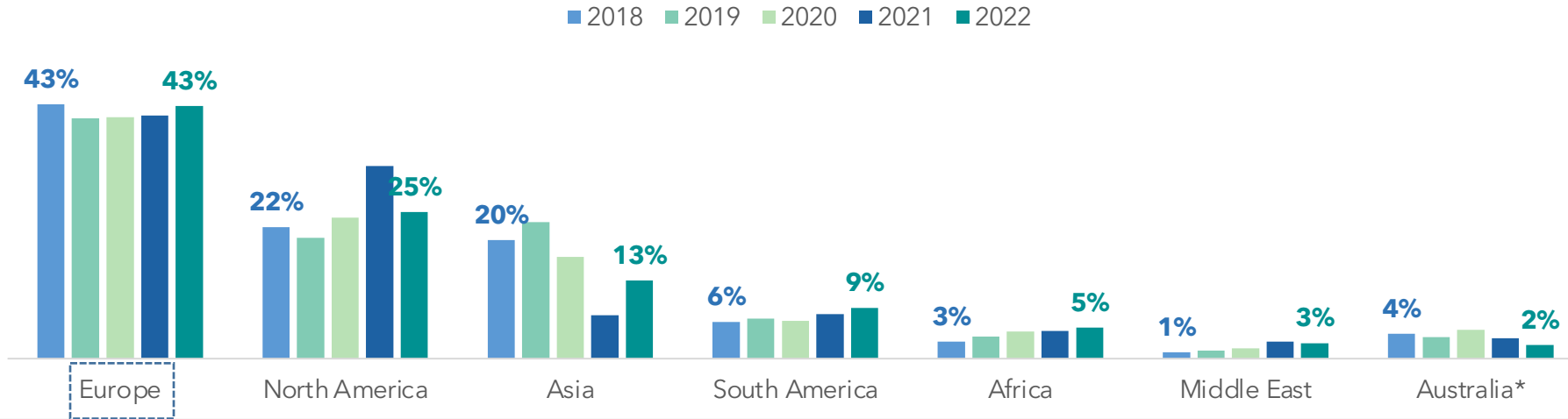
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# Ranking of Global Destinations in terms of Wellness Appeal - by Region

## Wellness Destination Ranking by CONTINENT

Jan-Dec 2018-2021 and Jan-Sep 2022 - based on the number of wellness mentions on social media, ALL MARKETS



**Europe has nearly half of the whole world's offering of wellness activities. As travel opens up, tourists are increasingly making a conscious effort to have a more wholesome, active and healthier itinerary**

Southern Europe is the region showing the highest increase in its wellness offer leveraging on its mild climate

South East Asia's wellness appeal declined since the pandemic due to the region's strong tourist restrictions but it is still a key renown destination player

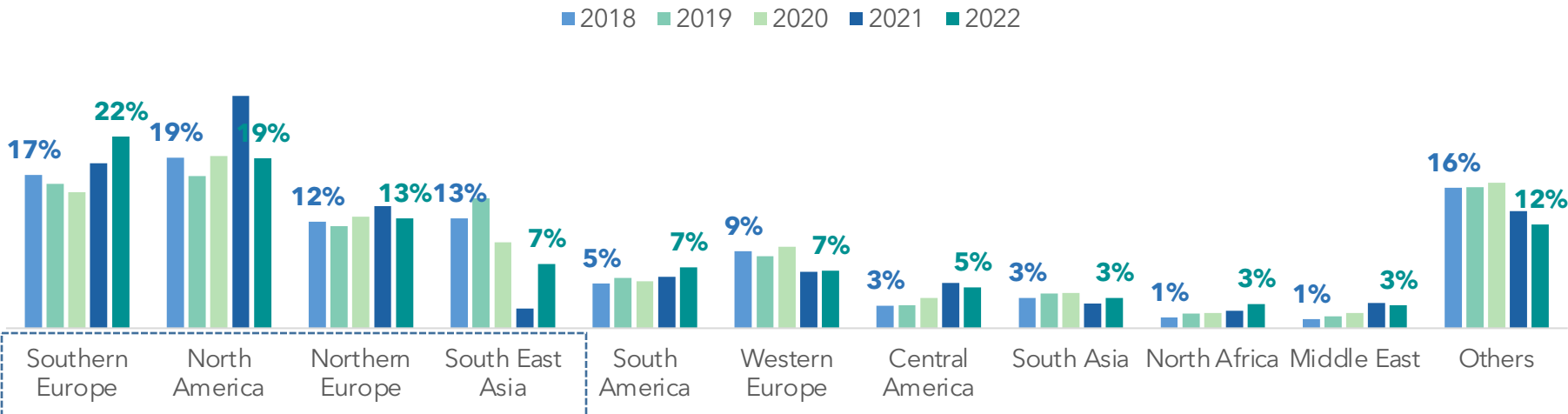
South and Central America are the regions showing highest growth in the number of wellness mentions on social medias starting from a low base

*Australia\* includes the Oceania region: Australia and New Zealand, Polynesia, Micronesia, Melanesia*

Source: TripAdvisor

## Wellness Destination Ranking by REGION

Jan-Dec 2018-2021 and Jan-Sep 2022 - based on the number of wellness mentions on social media, ALL MARKETS





## Top 20 Wellness Worldwide Destinations

### Share of Wellness Mentions by Top 20 DESTINATIONS

Jan-Dec 2018, 2019 and Jan-Sep 2022

Top 20	2018	Top 20	2019	Top 20	2022
Hanoi - Vietnam	10%	Ho Chi Minh - Vietnam	13%	Cusco - Peru	14%
Kathmandu - Nepal	8%	Hanoi - Vietnam	13%	Ho Chi Minh - Vietnam	7%
Ho Chi Minh - Vietnam	8%	Cusco - Peru	8%	Los Cabos - Mexico	7%
Cusco - Peru	7%	Kathmandu - Nepal	7%	Puerto Rico - Caribbean	5%
<b>Budapest - Hungary</b>	7%	Marrakech - Morocco	6%	Sicily - Italy	5%
<b>Bangkok - Thailand</b>	6%	<b>Bangkok - Thailand</b>	5%	Istanbul - Turkey	5%
Rome - Italy	5%	<b>Budapest - Hungary</b>	5%	Marrakech - Morocco	5%
Oahu - Hawaii (US)	5%	Istanbul - Turkey	4%	Kathmandu - Nepal	5%
Marrakech - Morocco	5%	Oahu - Hawaii (US)	4%	Rome - Italy	5%
Phuket - Thailand	4%	Rome - Italy	4%	Paris - France	5%
Barcelona - Spain	4%	Phuket - Thailand	4%	Oahu - Hawaii (US)	4%
Lisbon - Portugal	4%	<b>Batam - Indonesia</b>	4%	Dubrovnik - Croatia	4%
Maui - Hawaii (US)	4%	Barcelona - Spain	3%	Nevada - US	4%
Paris - France	4%	Lisbon - Portugal	3%	Maui - Hawaii (US)	4%
<b>London - UK</b>	3%	London - Portugal	3%	Hanoi - Vietnam	4%
Sicily - Italy	3%	Maui - Hawaii (US)	3%	Barcelona - Spain	4%
<b>Honolulu - Hawaii (US)</b>	3%	Paris - France	3%	Phuket - Thailand	3%
<b>Prague - Czech Rep</b>	3%	Sicily - Italy	3%	Scottsdale - UK	3%
<b>Beijing - China</b>	3%	<b>Honolulu - Hawaii (US)</b>	3%	Lisbon - Portugal	3%
<b>New Orleans - US</b>	2%	Los Cabos (Mexico)	2%	Singapore - Singapore	3%

Cusco (Peru) and Ho Chi Minh (Vietnam) were, and still are, in the top wellness destinations in all analysed years

Cusco is a key destination mainly for hiking in the Machu Picchu

Some Asian destinations such as Bangkok, Beijing and Batam disappeared from the top list in 2022 mainly due to the COVID restrictions in that region

Source: TripAdvisor, excluding Walking Tours

Red: declined its position vs 2019, Green: increased its position vs 2019, Yellow: no position change vs 2019, Bold- destinations that disappeared from 2022 list



## Top 20 Wellness Worldwide Destinations: Walking Tours

### Share of Wellness Mentions by Top 10 DESTINATIONS

Jan-Dec 2018, 2019 and Jan-Sep 2022, Walking

#### Top 10 2018

London - UK	16%
New York City - US	14%
<b>Prague - Czech Rep</b>	12%
<b>Berlin - Germany</b>	11%
Barcelona - Spain	10%
Rome - Italy	9%
<b>Amsterdam - Netherlands</b>	8%
<b>Lisbon - Portugal</b>	7%
New Orleans - US	6%
Dublin - Ireland	6%

#### Top 10 2019

London - UK	17%
New York City - US	13%
<b>Berlin - Germany</b>	12%
<b>Prague - Czech Rep</b>	10%
<b>Rome - Italy</b>	10%
Dublin - Ireland	8%
<b>Amsterdam - Netherlands</b>	8%
Porto - Portugal	8%
Barcelona - Spain	7%
<b>Lisbon - Portugal</b>	7%

#### Top 10 2022

Rome - Italy	24%
London - UK	15%
New York City - US	11%
Barcelona - Spain	9%
Dublin - Ireland	8%
Porto - Portugal	7%
New Orleans - US	7%
Madrid - Spain	7%
Istanbul - Turkey	7%
Dubrovnik - Croatia	6%

#### London and New York remained in the top walking destinations in all analysed years

Rome gained a lot of traction in 2022 with other European destinations such as Madrid and Dubrovnik appearing in the top 10 most mentioned destinations for walking

Growing interest in Croatia also probably due to the success of Game of Thrones

Source: TripAdvisor

Red: declined its position vs 2019, Green: increased its position vs 2019, Yellow: no position change vs 2019, Bold- destinations that disappeared from 2022 list



## Top 20 Wellness Worldwide Destinations: Hiking & Camping Tours

### Share of Wellness Mentions by Top 10 DESTINATIONS

Jan-Dec 2018, 2019 and Jan-Sep 2022, Hiking

Top 10	2018	Top 10	2019	Top 10	2022
Kathmandu - Nepal	30%	Cusco - Peru	31%	Cusco - Peru	40%
Cusco - Peru	30%	Kathmandu - Nepal	28%	Kathmandu - Nepal	13%
Sicily - Italy	7%	Marrakech - Morocco	9%	Sicily - Italy	9%
Page - US	6%	Sicily - Italy	6%	Marrakech - Morocco	7%
Moshi - Tanzania	6%	Moshi - Tanzania	5%	Moshi - Tanzania	6%
<b>Pokhara - Nepal</b>	5%	<b>Pokhara - Nepal</b>	5%	Puerto Rico - Caribbean	6%
Marrakech - Morocco	5%	Page - US	5%	Lombok - Indonesia	5%
<b>Sapa - Vietnam</b>	5%	<b>Hanoi - Vietnam</b>	4%	Page - US	5%
<b>Beijing - China</b>	3%	<b>Sapa - Vietnam</b>	4%	New Delhi/Himalayas - India	5%
<b>Cat Ba Island - Vietnam</b>	3%	<b>La Paz - Bolivia</b>	3%	Nevada - US	5%

Cusco, Kathmandu and Sicily appeared in the top hiking & camping tour destinations in all analysed years with the worldwide interest in Machu Picchu, Everest and Mount Etna multiple tours

In 2022 tours in Puerto Rico, Lombok, Nevada and Himalayas entered the list of top 10 hiking & camping tours

Source: TripAdvisor

Red: declined its position vs 2019, Green: increased its position vs 2019, Yellow: no position change vs 2019, Bold- destinations that disappeared from 2022 list



## Top 20 Wellness Worldwide Destinations: Bike Tours

### Share of Wellness Mentions by Top 10 DESTINATIONS

Jan-Dec 2018, 2019 and Jan-Sep 2022, Bike Tours

Top 10	2018	Top 10	2019	Top 10	2022
Ho Chi Minh - Vietnam	16%	Ho Chi Minh - Vietnam	34%	Los Cabos - Mexico	21%
Barcelona - Spain	15%	Barcelona - Spain	11%	Ho Chi Minh - Vietnam	16%
Rome - Italy	10%	Los Cabos - Mexico	9%	Paris - France	11%
Prague - Czech Rep	10%	Munich - Germany	8%	Scottsdale - UK	10%
New York City - US	9%	Hanoi - Vietnam	8%	Barcelona - Spain	9%
<b>Bangkok - Thailand</b>	8%	New York City - US	7%	Rome - Italy	8%
Munich - Germany	8%	Rome - Italy	7%	Amsterdam - Netherlands	7%
Los Cabos - Mexico	8%	<b>La Paz - Bolivia</b>	6%	New York City - US	7%
<b>Hanoi - Vietnam</b>	8%	Prague - Czech Rep	5%	Prague - Czech Rep	6%
Paris - France	7%	Paris - France	5%	Munich - Germany	6%

**Ho Chi Minh's bike tours along the Mekong river were and still are the most mentioned in all analysed years**

Scottsdale's mountain entered the top 10 list of bike tour destinations in 2022 for its mountain bike tours in the surroundings of the city

Source: TripAdvisor

Red: declined its position vs 2019, Green: increased its position vs 2019, Yellow: no position change vs 2019, Bold- destinations that disappeared from 2022 list



## Top 20 Wellness Worldwide Destinations: Kayaking & Canoeing Tours

### Share of Wellness Mentions by Top 10 DESTINATIONS

Jan-Dec 2018, 2019 and Jan-Sep 2022, Kayaking & Canoeing

Top 10	2018	Top 10	2019	Top 10	2022
Hanoi - Vietnam	26%	Ho Chi Minh - Vietnam	31%	Ho Chi Minh - Vietnam	19%
Ho Chi Minh - Vietnam	16%	Hanoi - Vietnam	22%	Hanoi - Vietnam	7%
Cat Ba - Vietnam	9%	Key West - US	8%	Key West - US	10%
Key West - US	9%	Cat Ba - Vietnam	7%	Cat Ba - Vietnam	0%
Kauai - Hawaii (US)	8%	Dubrovnik - Croatia	7%	Dubrovnik - Croatia	20%
<b>Crystal River - US</b>	7%	Kauai - Hawaii (US)	6%	Kauai - Hawaii (US)	6%
Dubrovnik - Croatia	7%	Puerto Rico - Caribbean	5%	Puerto Rico - Caribbean	16%
Hilton Head - US	6%	Bovec - Slovenia	5%	Bovec - Slovenia	7%
<b>Vancouver Island - Canada</b>	6%	Oahu - Hawaii (US)	5%	Oahu - Hawaii (US)	10%
<b>Phuket - Thailand</b>	6%	Hilton Head - US	4%	Hilton Head - US	6%

Ho Chi Minh's Mekong River, Hanoi's Halong Bay, Key West's Florida's waters, Cat Ba Vietnamese's waters and Kaua's Wailua river maintained their top positions in terms of kayaking and canoeing destinations in all analysed years up to now. No variation in the top 10 destinations in 2019 and 2022

Crystal River (Florida), Vancouver Island (Canada) and Phuket (Thailand) disappeared from the top 10 most mentioned destinations for kayaking and canoeing tours

Source: TripAdvisor

Red: declined its position vs 2019, Green: increased its position vs 2019, Yellow: no position change vs 2019, Bold- destinations that disappeared from 2022 list



## Top 20 Wellness Worldwide Destinations: Spas

### Share of Wellness Mentions by Top 10 DESTINATIONS

Jan-Dec 2018, 2019 and Jan-Sep 2022, Spas

Top 10	2018	Top 10	2019	Top 10	2022
Hanoi - Vietnam	18%	Hanoi - Vietnam	23%	Los Cabos - Mexico	16%
Bangkok - Thailand	15%	<b>Batam - Indonesia</b>	13%	<b>Istanbul - Turkey</b>	15%
<b>Ho Chi Minh - Vietnam</b>	11%	Bangkok - Thailand	12%	Singapore - Singapore	11%
Phuket - Thailand	11%	Phuket - Thailand	10%	<b>Phuket - Thailand</b>	10%
Marrakech - Morocco	9%	Marrakech - Morocco	9%	Paris - France	9%
<b>Budapest - Hungary</b>	8%	<b>Ho Chi Minh - Vietnam</b>	8%	<b>Marrakech - Morocco</b>	9%
<b>Seminyak - Indonesia</b>	8%	Istanbul - Turkey	8%	<b>Nusa Dua - Caribbean</b>	9%
Paris - France	8%	<b>Seminyak - Indonesia</b>	6%	<b>Bangkok - Thailand</b>	7%
<b>Grindavik - Island</b>	7%	Nusa Dua - Indonesia	5%	London - UK	7%
Nusa Dua - Caribbean	6%	<b>Budapest - Hungary</b>	5%	<b>Hanoi - Vietnam</b>	6%

**Phuket is the only destination that maintained its position in the top destinations for SPAs throughout the years**

Many Asian destinations such as Batam, Hanoi, Phuket, Ho Chi Minh and Seminyak disappeared from the top 10 Spa key destinations in 2022 as they were the last to open post covid

Source: TripAdvisor

*Red: declined its position vs 2019, Green: increased its position vs 2019, Yellow: no position change vs 2019, Bold- destinations that disappeared from 2022 list*



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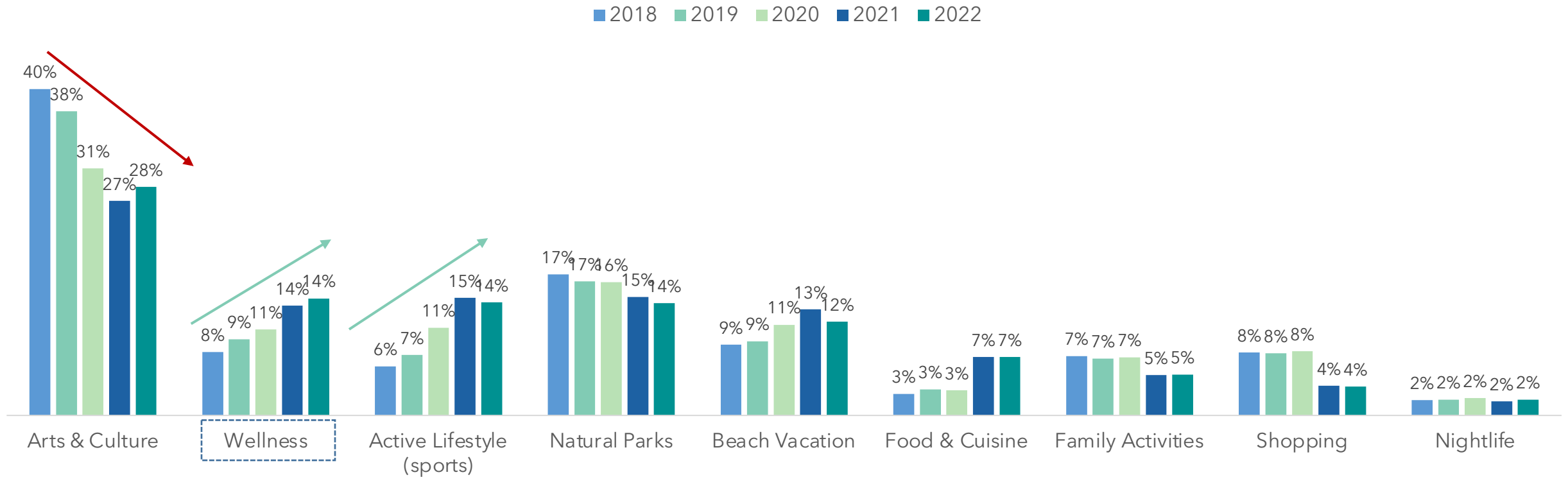
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# Wellness vs. Other Tourist Products - GCC Markets

## DOMESTIC Mention Share by Tourist Product - GCC MARKETS

Jan-Dec 2018-2021 and Jan-Sep 2022, GCC Markets, INBOUND & OUTBOUND Destinations



**The interest of the GCC markets in wellness activities has nearly doubled in the last five years**

Source: TripAdvisor

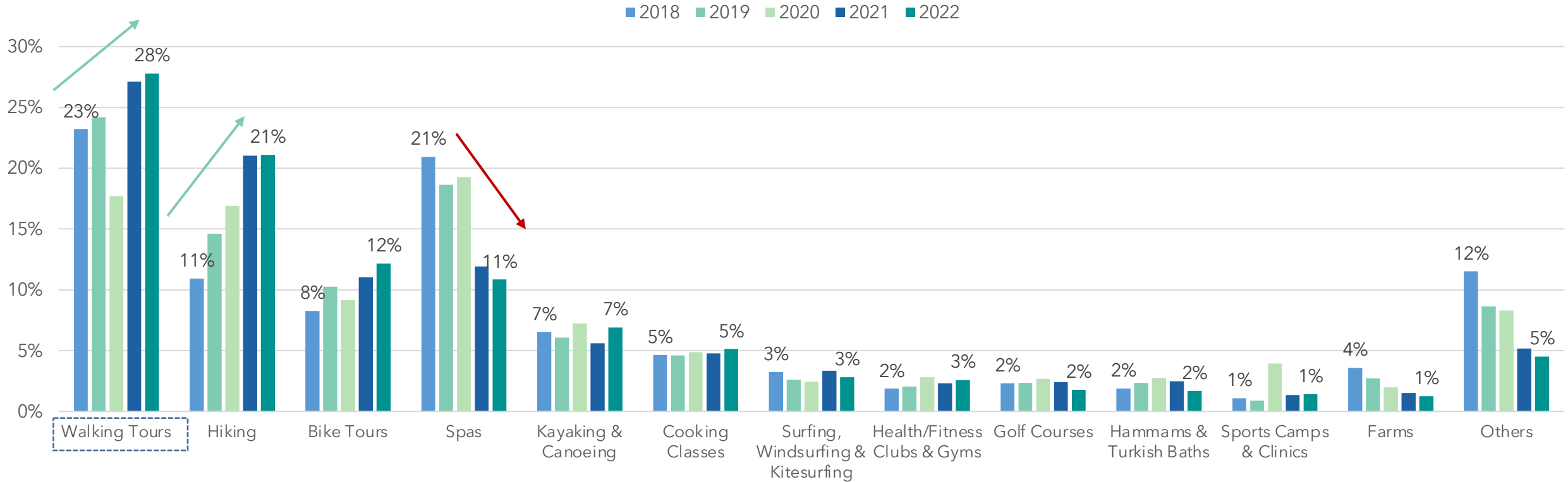
The pandemic had a negative impact on tourists' interest in enclosed locations such as shops and museums whilst outdoor activities gained traction



# Wellness Activities - GCC Markets, Inbound & Outbound Destinations

## Share of Mentions by Wellness Activities - GCC MARKETS

Jan-Dec 2018-2021 and Jan-Sep 2022, GCC Markets, INBOUND & OUTBOUND Destinations



**The GCC markets preferred Walking Tours in all analysed years - the interest in SPAs strongly declined after the pandemic**

Source: TripAdvisor

More dynamic activities are gaining traction with hiking & camping, bike tours and health and fitness seeing a surge in the number of mentions



## Top 10 Wellness Destinations for the GCC Markets

### Top 10 Wellness INTERNATIONAL DESTINATIONS for the GCC MARKETS

Jan-Dec 2018-2021 and Jan-Sep 2022, GCC Markets, INTERNATIONAL Destinations

#### 2018

Thailand  
Indonesia  
India  
USA  
Great Britain  
Nepal  
Vietnam  
Italy  
Turkey  
Sri Lanka

#### 2019

Indonesia  
Vietnam  
Thailand  
India  
Nepal  
Great Britain  
Turkey  
Italy  
USA  
Sri Lanka

#### 2022

Thailand  
Turkey  
Nepal  
Azerbaijan  
Italy  
Great Britain  
India  
Spain  
Georgia  
Tanzania

Thailand maintained its top position as the most visited destination for wellness by the CGG markets

Source: TripAdvisor

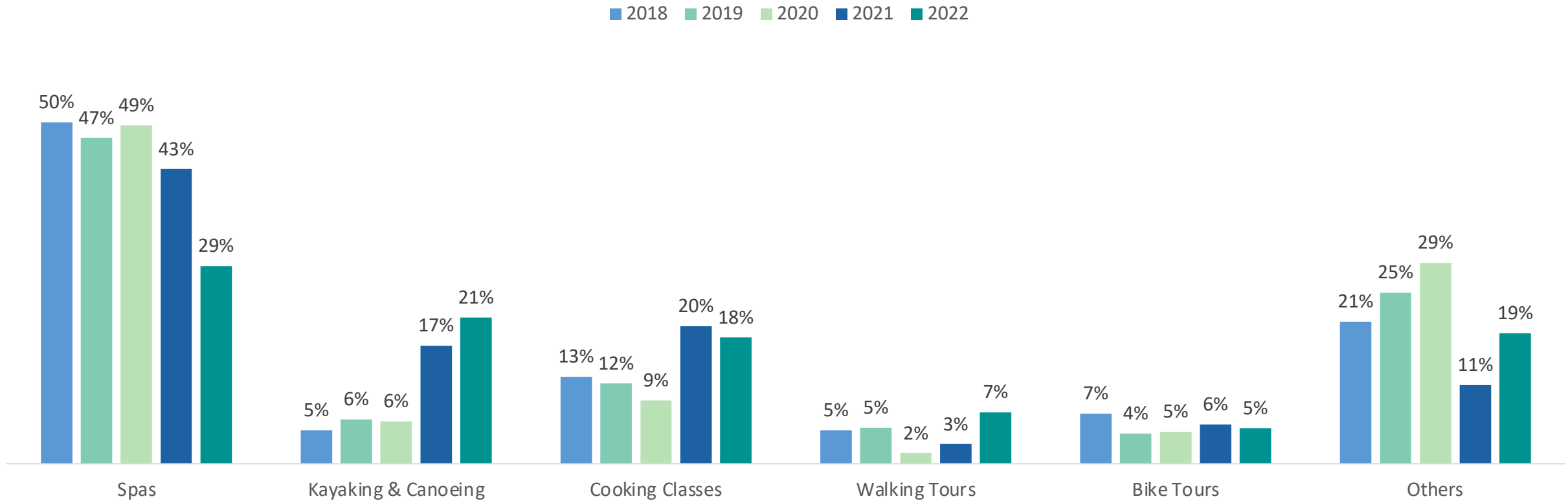
Red: declined its position vs 2019, Green: increased its position vs 2019, Yellow: no position change vs 2019, Bold- destinations that disappeared from 2022 list



# Key GCC Market Wellness Activities in Thailand

## Key Wellness Activities of the GCC Markets in THAILAND

Jan-Dec 2018-2021 and Jan-Sep 2022, GCC Markets, THAILAND Destination



Thailand's SPAs and its kayaking & canoeing and cooking classes offer attract GCC Markets looking for wellness experiences

Source: TripAdvisor



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## Methodology & Sources

### Used Data

#### Behaviour KPIs

- Mentions by product, sub-product and activities
- Mentions by country, region, continent

#### Accommodation KPIs

- Satisfaction indicators based on sentiment of hotel reviews (hotels including "Spa" in their names)

#### Sustainability Perception

- Based on mentions on social media

Sources: TripAdvisor (social media and hotel portals), Expedia, Booking, Instagram & Twitter

Data timeframe for 2022:  
1st January - 27th September 2022

- This report is mainly based on the TripAdvisor source which has the advantage of being a major global source for tourism, it offers historic data and in-depth granularity. This source gathers real-time reviews of travellers who have visited a specific destination but it does not include inspirational mention of future travels. Chinese and Arab mentions are excluded
- Mabrian uses innovative technology to gather, aggregate and enhance big volumes of data from multiple sources of information exclusively for the tourism sector. This particular report is based on the analysis of reviews on social media and hotel platforms based on Natural Language Processing (NLP) techniques which extract raw and unstructured data to transform it into actionable insights. To do this we draw on machine learning and artificial intelligence (AI) to take data and segment it by sentences, make use of stemming techniques (reducing words down to their origin), grammar labelling and other methods - all the while using special algorithms to exclude irrelevant data (particularly non-tourism related data).
- The importance of wellness, its subproducts (soft adventure, water sports...) and activities (walking, bike tours, SPAs...) globally, by region and country is based on the relative percentage of mentions on social media.
- The top destinations in terms of wellness appeal are based on the top 20 destinations with the highest number of wellness mentions on social medias.
- The satisfaction of hotels with wellness offer is based on the sentiment of the reviews on hotel portals from 0 to 100 where 0 is extremely poor and 100 is excellent. The SPA hotel offer is based on the number of hotels that have the name "SPA" in their name.
- The perception of sustainability of a destination is based on the number of mentions on social media: TripAdvisor, Instagram and Twitter. The destinations analysed for the sustainability perception are: Barcelona, Berlin, Costa Rica, Dubai, Hungary, Lloret de Mar, Madrid, Menorca, Paris, Rome, Saudi Arabia, Sevilla, Vienna



## Definitions

- Wellness includes the following subproducts and activities: Water sports (Kayaking & Canoeing, Surfing, Windsurfing & Kitesurfing), Countryside/Rural (Farms, Other Ranches & Farms, Ranches), Soft adventure (Hiking & Camping Tours, Bike Tours, Walking), Sports (Running Tours, Sports Camps & Clinics, Sports Complexes, Golf Courses, Jogging, Paths & Tracks), Gastronomy (Cooking Classes), Spa (Spas, Thermal Spas, Arab Baths, Hammams & Turkish Baths, Onsen Resorts, Hot Springs & Geysers), Health & Fitness (Yoga & Pilates, Health/Fitness Clubs & Gyms)
- GCC includes: UAE, Saudi Arabia, Oman, Qatar, Bahrein, Kuwait
- Wellness hotel offer: comprises of the number of hotels which include “Spa” in their names
- Major subproducts and activities by Product:
  - Beach Vacation: beaches
  - Natural Parks: natural parks, landscape and scenic tours (forests, mountains,...)
  - Arts & Culture: museums, history & heritage (castles, monuments,...), arts (art galleries, concerts,...)
  - Nightlife: bars & clubs, discos
  - Shopping: shopping stores, markets
  - Family activities: parks, themed parks
  - Active lifestyle: sports (running, jogging,...)
  - Food & Cuisine: gastronomy, wines



# Let's talk!

info@mabrian.com  
www.mabrian.com



## MABRIAN HEADQUARTERS

Carreró des Muret s/N,  
07702 Maó, Menorca, Spain  
+34 871 201 231



## COMMERCIAL OFFICE

Av. Diagonal 512 1º 1ª,  
08006 Barcelona, Spain  
+34 931 968 272