

BUZZ VS REALITY Edition #5

Wellness:

Exploring the luxury traveller's mindset across APAC

In partnership with

Introduction

The world in 2025 isn't slowing down. Change is constant, plans are fluid - but luxury travel continues to thrive, with wellness at its heart.

Across Asia Pacific, affluent travellers are seeking more than just an escape. They're looking for meaning, balance, and experiences that nourish both body and mind. The definition of wellness travel is evolving into journeys that integrate fitness, mental clarity, and emotional wellbeing.

Asia, the spiritual home of traditional and holistic wellness, is now shaping the future of it - leading with innovation, depth, and a highly bespoke touch.

In this Buzz vs. Reality: APAC edition - launched in the Year of the Snake, a symbol of wisdom and transformation - we've partnered with Altiant and Hyatt to survey 450 affluent travellers across four key markets. The findings offer a clear picture of where wellness travel stands today, and where it's headed next.

We hope it sparks fresh thinking - and sets the tone for a year of thoughtful renewal.

Alison Gilmore Portfolio Director, ILTM









What's Staying, Growing and Slowing

Recent years have seen some clear shifts in traveller behaviour, with some trends accelerating, some slowing down and others stabilising. This edition of our 'Buzz vs Reality' series looks at which wellness trends are likely to strengthen and which may struggle to live up to the hype.

Staying

Wellness as a key decision factor: More than half (55%) say that wellness facilities and services are very important or essential to their choice of hotel. Spontaneous wellness bookings: Unplanned bookings while on holiday are likely to remain important, with 65% having done so previously. Week-long breaks: 4-8 nights is a sweet spot for wellness holidays: 72% list this as their ideal duration.

Travel agents as a key part of wellness holidays: Twothirds (66%) say they would be influential in helping them to plan a wellness trip. Traditional wellness therapies: The likes of spas (58%) and physical treatments such as massages (51%) are likely to remain among the most popular options overall.





Growing

Longevity and wellness assimilated into weekly routines: Three-quarters (77%) now participate in wellness in their daily lives, with 84% trying to improve their health for later in life

Planned wellness trips: Almost half (48%) now say that they have taken a specifically planned wellness holiday before, while only 6% have but do not plan to repeat.

Family-friendly wellness holidays: More than half (54%) are interested in wellness trips with their children, while **34%** are open to doing so with extended family such as parents.

New types of wellness: Nature immersions (54%), health evaluations (39%) and mental health support (32%) are just three areas which are likely to become even more popular in the coming years.

breaks: Only 7% are now completely opposed to these, having never taken one nor planning to do so in the future.

Opposition to wellness

Use of technology: Two-thirds (65%) are interested in the use of technology and AI to improve their health and reach wellness goals.

Slowing

Multi-location 'fast' travel:

79% say that they are more interested in 'slower' and more relaxing holidays nowadays.

Independently-located wellness: Only 23% prefer wellness services/activities which are located here. Increasingly, these are wanted as just one facet of a hotel's overall offering.

'One size fits all' wellness services: 80% now want these services to be tailored to personal health goals (e.g. reducing stress, improving fitness).

Wellness-friendly bedrooms: More than half (55%) are willing to pay more

for hotels which have the space for wellness facilities (e.g. indoor bikes, yoga mats) in the bedrooms.



WORLE HYATT

SECTION 1.

2

Luxury Travel Patterns

Tourism remains a key spending priority for many affluent/HWNIs as they look to spend their money on experiential luxury rather than on goods, particularly in the wake of likely price rises.

Domestic and regional trips should remain dominant in wealthy travellers' plans, especially in larger countries such as China.

The ongoing popularity of 'slow' and 'quiet' travel has buoyed the rejuvenation of services such as wellness retreats and long-distance trains.

Travel remains a central part of the affluent lifestyles

Tourism remains buoyant internationally, with flight numbers and hotels' occupation rates now often exceeding pre-2020 levels. Experiences such as travel remain a priority for many affluents as they look to enjoy their wealth with greater impetus and purpose. Many travellers are looking for deeper and more meaningful trips, often slowing down and spending longer at individual destinations, for example via luxury long-distance trains.

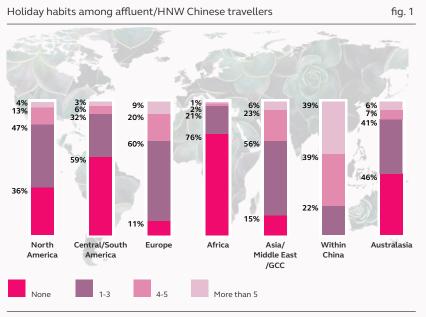
While many wealthy travellers do still travel long-distance, domestic and regional trips continue to lead the way as local regions are explored in greater detail. Indeed, Southeast Asia, and Thailand in particular, should see an uptick in popularity in 2025 due to prominent positioning in the television show The White Lotus. Some travellers may also eschew visiting the US due to the recent uncertainties under the new Trump administration.

ILTM ASIA PACIFIC



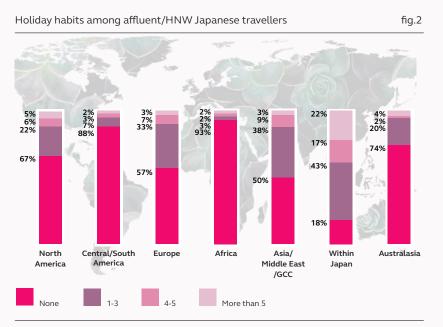
Domestic and regional trips lead the way

How many leisure holidays of at least 3 nights do you typically take annually to the following places?



Base: 150 Chinese affluent/HNWIs

Source: Altiant/LuxuryOpinions



that domestic trips are particularly popular among affluent/HNW Chinese travellers. More than three-quarters (78%) typically take more than three domestic trips annually, with only 29% doing this elsewhere in Asia/the Middle East/Gulf Cooperation Council (GCC) countries, despite their relative proximity. Instead, Europe holds a particularly strong attraction, with 89% visiting in a typical year and 29% doing so more than three times. North America is also popular, with almost twothirds tending to visit annually.

The vast size of China means

Four in five (82%) affluent/ HNW Japanese say that they typically take at least one domestic trip annually, with 39% taking more than three. Travel elsewhere within Asia or the Middle East is also reasonably popular, with half taking one of these trips per year, albeit only 12% regularly do so (three or more times). Europe is only slightly less popular, with 43% travelling there in a typical year, while one-third visit North America.

Base: 100 Japanese affluent/HNWIs

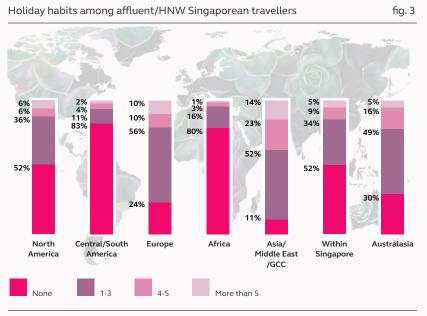
Source: Altiant/LuxuryOpinions





Domestic and regional trips lead the way

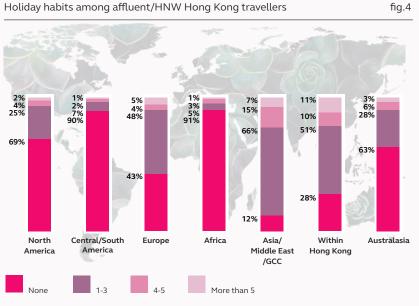
How many leisure holidays of at least 3 nights do you typically take annually to the following places?



Base: 100 Singaporean affluent/HNWIs

Source: Altiant/LuxuryOpinions

Holiday habits among affluent/HNW Hong Kong travellers



Base: 100 Hong Kong affluent/HNWIs

Source: Altiant/LuxuryOpinions

The relatively small size of Singapore means that a higher share of travellers look overseas for their holidays. Nevertheless, almost half (48%) do take at least one staycation domestically. Travel to other countries within Asia-Pacific is considerably more popular, with 89% visiting other countries in Asia/Middle East and 37% taking more than three of these. Europe is also regularly visited by wealthy Singaporean travellers, with three-quarters (76%) typically doing so annually.

Like Singapore, the small size of Hong Kong means that domestic travel is somewhat lower than in larger countries like China and Japan. However, 72% do typically take a domestic trip annually and enjoy locations such as Cheung Sha Beach or Repulse Bay. Meanwhile, 88% visit other countries within Asia/Middle East, with 37% doing so more than three times. Finally, more than half (57%) venture to Europe, while Australasia (37%) and North America trail a little further back (31%).



SECTION 2. The Affluent Perspective on Health and Wellness

KEY POINTS

Affluent/HNWIs are in good mental and physical shape, although with clear areas to improve on, like stress levels and sleep quality. Eighty-four per cent (84%) are trying to improve their health for later in life.

/ Three-quarters have already assimilated wellness into their daily lives (77%) and are focusing on their health more since the Covid-19 pandemic (76%).

Wellness is defined in various ways, encompassing both mental and physical health. Many travellers are looking to continue with their wellness habits on holidays and enjoy therapies and treatments, or simply enjoy rejuvenating experiences in nature.





Stress levels and sleep quality have the most scope for improvement

Overall, wealthy APAC individuals feel that they are in reasonably good mental and physical shape. On most metrics, they describe themselves favourably, with a high level of happiness and direction in life. The financial comfort and security of their wealth evidently have a positive impact on factors such as contentment and stress levels. Nevertheless, there is clear scope for improvement in areas such as diet and sleep quality, something which the travel industry can address directly. Sleep quality represents a growth area, and one that is likely to continue flourishing in the years ahead.

Many affluent/ HNWIs have already integrated wellness into their daily lives

Wellness has become an increasingly central part of people's lives, with more than three-quarters (77%) of wealthy APAC individuals now taking part in wellness activities in their weekly routine. Evidently, the concept of 'health being the new wealth' rings true for many of these people. Affluent/HNW Chinese are the most likely to have integrated wellness activities into their weekly routines (87%), while those from Japan (61%) are least likely to do so.

How would you describe yourself in relation to the following factors on a scale of 1-5?

Levels of physical and mental wellbeing [mean score /5] fig. 5



Base: 450 APAC affluent/HNWIs Source: Altiant/LuxuryOpinions

Do you generally take part in wellness activities in your weekly routine?

Participation in wellness activities in weekly routines

Base: 450 APAC affluent/HNWIs

Source: Altiant/LuxuryOpinions



fig. 6



In your own words, how would you define wellness?

"Wellness to me is having good physical and mental health and being able to bounce back from the challenges of life. It is also being able to enjoy the good things that life has to offer and having healthy relationships with family, friends and peers."

Hong Kong female 65+, HK \$40-80m Inv. Assets

"Wellness is spiritual, physical and emotional wellbeing and balance. It is a sense of contentment and optimism about one's future."

Hong Kong female 45-54, HK \$ 40-80m Inv. Assets

"Wellness is being able to relax and let go mentally, able to meditate, just do nothing and enjoy anything related to that, like massage, yoga, swimming, sound healing, reading or just enjoying a favourite activity."

Singaporean female 45-54, SG \$1.4-3.5m Inv. Assets "Wellness, to me, is a whole state of being that includes physical, mental, emotional and social well-being. A balanced and satisfying life is achieved via the active pursuit of activities, choices and lifestyles rather than simply the absence of illness. Wellness influences how I approach problems, connect with others and manage my time and energy. When I feel well, I am more productive, creative and resilient. It allows me to be my best self at work, with my family and in my personal interests."

Singaporean male 45-54, SG \$700k-1.4m Inv. Assets "I think wellness is about maintaining a balance between physical health, mental health and emotional stability. It's important to feel good in your body and mind, manage stress well and have the energy to work at your work and personal life. However, it can be difficult to make time for exercise, rest and self-care in our busy lives, especially as we get older."

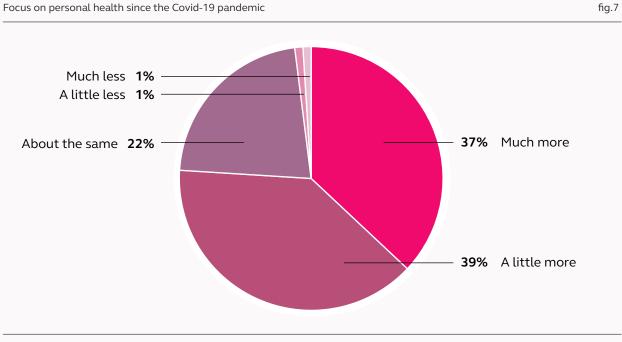
Japanese female 45-54, Y 150-375m Inv. Assets







The pandemic is likely to have been one of the main reasons why there has been a notable rise in many people's focus on wellness. Overall, 37% say that they have become much more focused on their personal health in recent years, with another 39% giving it a little more attention, with broadly similar responses across all four countries. Just under a quarter (22%) have not really changed their focus, while only 2% have reduced it, underlining its importance in affluent lifestyles.



Have you become more or less focused on your personal health since the Covid-19 pandemic?

With 84% of respondents agreeing that they are trying to improve their health for later in life (see Fig. 19), this is now a well-ingrained attitude for the majority of affluent/HNWIs in APAC. Source: Altiant/LuxuryOpinions

This growing prioritisation of health has led to a buoyant wellness industry, which is now worth \$6.3 trillion according to the Global Wellness Institute. Many travellers are now looking to incorporate these wellness principles into their trips, representing an increasingly lucrative opportunity for hoteliers to tap into.







12

Base: 450 APAC affluent/HNWIs

SECTION 3. Trends in Wellness Travel

KEY POINTS

More than half (55%) now say that wellness facilities are services that are very important or essential to their hotel choices on holiday. Spontaneous wellness bookings for therapies or treatments while on holiday are popular, with two-thirds (65%) having done so previously.

Overall, more than half (54%) of affluent/HNWIs from APAC have taken a specifically planned wellness holiday before, while another 39% have never done so but are interested in doing so in the future.

Almost two-thirds (62%) say that their ideal wellness holiday would last between 4-8 days, with 33% willing to spend more than 10% extra for specifically planned wellness holidays.

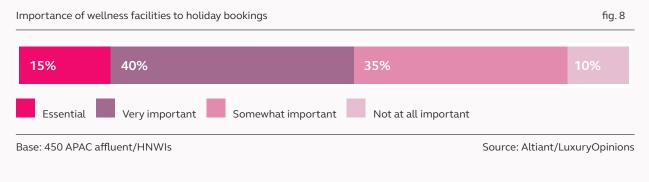




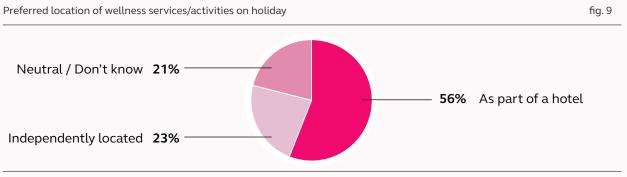
More than half say that wellness facilities are very important or essential

Many hotels are capitalising on guests' growing interest in wellness and are expanding their services to cater for different needs, often collaborating with non-travel luxury brands. Only 10% of affluent/HNWIs now say that wellness facilities have no impact on their holiday bookings, rising highest among Japanese respondents, albeit only to 18%. On the other hand, 55% say that they are now very important or essential to their plans. This peaks among Chinese respondents at 67%, with under-45s also being more likely than their older counterparts to say so (64% vs 43%).

How important are wellness facilities and services when choosing which hotel to stay at on holiday?



Would you prefer wellness services/activities to be located in an independent venue (e.g. golf resort, health spa), or as part of a more general hotel/resort?



Base: 389 APAC affluent/HNWIs who are interested in future wellness holidays

Wealthy travellers are most likely to want these services and facilities located on-site, removing the need to take specific journeys to access them. Almost three in five (56%) say that they prefer wellness offerings to be included as part of a hoSource: Altiant/LuxuryOpinions

tel/resort's overall offering, with only 23% favouring independently located services. Larger resorts have the opportunity to use wellness as one of the tools in their arsenal to encourage guests to spend more of their time and money on-site.



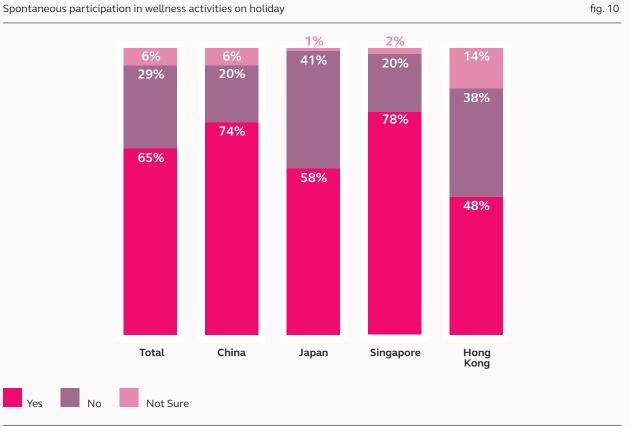




Two-thirds take part in wellness spontaneously on holiday

Increasing the range and visibility of wellness activities can also help to drive spontaneous bookings for treatments or therapies. Overall, two-thirds (65%) have previously booked wellness activities on impulse, with the response only falling away notably in Hong Kong (48%). Hotels should, therefore, clearly promote their available services, given the broadly high openness to unplanned wellness.

Have you ever spontaneously taken part in wellness activities while on a general holiday?



Base: 450 APAC affluent/HNWIs

Source: Altiant/LuxuryOpinions







"It was early in the morning, but we got a special feeling from being able to do yoga on the beach while basking in the sun of Miyakojima."

Japanese male 25-34, Y 0-75m Inv. Assets

"I previously participated in a voluntary wellness activity offering dance classes at a resort in Macau. The class was the perfect mix of relaxation, learning and fun. I was drawn to this class because I wanted to try something new. What was special was the opportunity to bond with other people." "Mediation walks through beautiful trails in a Japanese Monastery. Hosting and attending various Tai Chi retreats over the past 40 years in America and Asia."

Hong Kong male 65+, HK \$4-8m Inv. Assets

Japanese female, 45-54 Y 150-375m Inv. Assets

"I wanted to try a new massage technique followed by a sound bath; I was curious to experience it myself after hearing a lot about it."

Singaporean female 55-64, £1.4-3.5m Inv. Assets

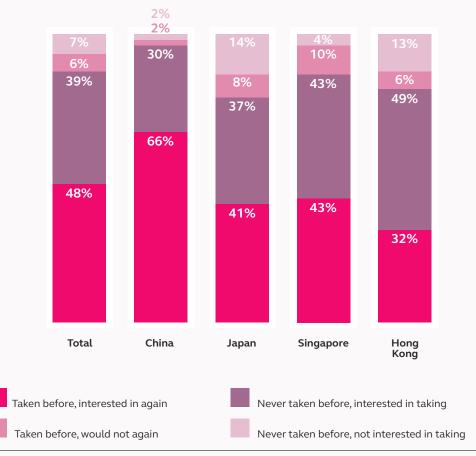
. A LTIANT



Half have taken a specifically planned wellness trip before

Which of the following is most applicable to you regarding specifically planned wellness holidays?

Participation and interest in planned wellness holidays



Source: Altiant/LuxuryOpinions

Base: 450 APAC affluent/HNWIs

The rising popularity of wellness tourism is underlined by more than half (54%) having now taken a specifically planned wellness trip before. Satisfaction is also high, with only 6% having taken one before but not being interested in repeating. Wealthy Chinese (66%) respondents are the most likely previous wellness travellers, falling to just 32% among those from Hong Kong.

While Hong Kong respondents are currently the least likely to have taken one of these trips, almost half (49%) are interested in doing so in the future. This represents a significant growth opportunity, with high levels of future interest also present among affluent Japanese (37%) and Singaporean (43%) travellers. Only 7% appear to be completely opposed to holidays of this type, having never taken one nor planning to do so in the future.





fig. 11



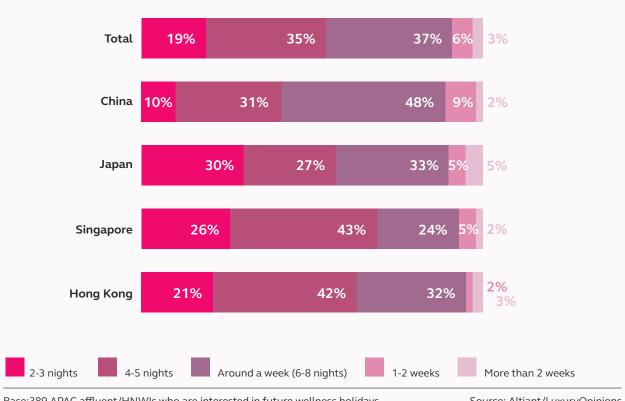
Wellness breaks lasting 4-8 days hit the sweet spot

Among the 86% of the sample who have taken a wellness holiday before or are interested in doing so, only 19% would limit their trip to 2-3 nights. Affluent/HNW Japanese (30%) are the most likely to want to limit their break to get-aways such as weekend breaks, while this shorter break is far less popular among Chinese (10%).

Wellness holidays lasting 4-8 nights appear to be the sweet spot as 72% list this as their ideal duration, peaking among wealthy Chinese (79%) and Hong Kong respondents (74%). Meanwhile, another 9% say that wellness holidays lasting for more than a week would be their preferred choice. These trips are likely to overlap with holidays which involve a longer travel time to reach the destination, as outlined in Section 1.

How long would your ideal wellness holiday last?

Preferred duration of wellness holidays



Base:389 APAC affluent/HNWIs who are interested in future wellness holidays

Source: Altiant/LuxuryOpinions





fig. 12





Are you willing to spend any extra for specifically planned wellness holidays (vs those which are not focused on wellness)?

Base: 389 APAC affluent/HNWIs who are interested in future wellness holidays

Source: Altiant/LuxuryOpinions

Wellness can also be an effective way of getting the wealthy to spend more during their holidays. Only 10% of wellness travellers are unwilling to spend any more on specifically planned holidays of this type. Instead, 57% are receptive to spending a small premium of up to 10% extra, with Chinese and Hong Kong respondents most likely to do so. Another third (33%) are willing to spend more than 10% extra, with only those from Hong Kong being less likely than average to do so (23%).





SECTION 4. Influences, Companions and Activities

Immediate personal connections such as friends and family are the most likely influences on wellness trips. However, around three-quarters also say that travel agents, concierge services and medical professionals could have some influence.

Wellness holidays are most likely to be taken as a couple (66%), but family-oriented trips are also particularly popular among wealthy APAC travellers (54%). On the other hand, a quarter (27%) are interested in taking wellness holidays on their own.

Spa resorts/therapies (58%) are the most popular wellness activities overall, with nature immersions and physical treatments such as massage and acupuncture following close behind. Various other services such as health evaluations and detoxes are also of interest to a significant minority.





Immediate contacts are the most influential for wellness bookings

Among those who have taken a specifically planned wellness holiday before or are interested in doing so, immediate networks have the greatest influence. Friends, partners and other family members are all cited by 90% or more as being either somewhat or very influential on the booking. Work colleagues follow a short distance behind (73%), albeit falling to 57% in Japan.

A cluster of other people outside of travellers' immediate networks can also play a key role. Concierge services, medical professionals and travel agents are all cited as very or somewhat influential when it comes to wellness holidays.

Influences on wellness holiday bookings [any 'very/somewhat influential']

Variations by age become more visible when it comes to digital influences, as under-45s are more likely than over-45s to be influenced by travel bloggers/podcasters (82% vs 66%) and social media influencers (62% vs 52%).

Almost three in five (59%) are interested in follow-up correspondence or advice from the organisers after taking a wellness trip, rising to three-quarters in China but sitting at around half in the other three countries. This could, therefore, be an effective way for hotels to continue communicating with guests after the holiday has ended, potentially encouraging longer-term loyalty and repeat visits.

93% Family members Friends 90% Partner / Spouse 90%

How influential would the following be if you were to go on a specifically planned wellness holiday?

Base: 389 APAC affluent/HNWIs who are interested in future wellness holidays

Source: Altiant/LuxuryOpinions





fig.14



Logically, given their influence, wellness holidays are most likely to be taken as a couple, with two-thirds (66%) interested in these types of trips. Affluent Singaporeans are the most likely to take a wellness holiday with their partner (72%), falling to 60% among Chinese respondents. Instead, affluent wellness travellers from China are much more likely to prefer travelling in groups, with more than two-thirds doing so with their children and around half with friends and extended family such as siblings or their parents (also see Fig. 19). These results fall to notably lower levels in the three other markets, showing a clear point of difference for Chinese wellness travellers. The results for taking wellness trips with children are much higher than the equivalent seen in our 2024 global report, which can be accessed here. Solo trips can also appeal, with more than a quarter (27%) interested in these, providing a clear opportunity for hotels which are able to cater effectively to solo travellers on price and services.

Who would you be interested in going on a specifically planned wellness holiday with?

| Companions for wellness holidays | | | | | fig.15 |
|--|-------|-------|-------|-----------|--------------|
| | Total | China | Japan | Singapore | Hong Kong |
| With partner/spouse only as a couple | 66% | 60% | 62% | 72% | 73% |
| With partner/spouse | 54% | 68% | 60% | 43% | 36% |
| With friends | 43% | 53% | 31% | 43% | 38% |
| With extended family (e.g. parents, siblings) | 34% | 47% | 23% | 29% | 28% |
| On my own | 27% | 30% | 22% | 31% | 20% |

Base: 389 APAC affluent/HNWIs who are interested in future wellness holidays

Source: Altiant/LuxuryOpinions







Widespread interest in various wellness activities

Many Asian countries have long histories of holistic and tradition-based practices, with a wide variety of both traditional and modern activities now appealing to wealthy Asian travellers and those from further afield. Culturally-rooted options such as Tai Chi retreats, gong baths and tea ceremonies can be an effective way for the region to leverage its longstanding focus on wellbeing.

Overall, spa resorts/therapies (58%) are the most popular activities, with nature immersions and physical treatments such as massage and acupuncture following close behind (54% and 51% respectively). Adventure or fitness pursuits and exercise classes are also of interest to just under half. Wellness is increasingly moving beyond these more established treatments and towards new and more immersive horizons.

Reconnecting with nature and outdoor activities – often in groups, such as with other family members – are growing in popularity as an effective way for holiday-goers to recharge and rejuvenate. Similarly, mindfulness and digital detox trips (31%) which enable people to switch off from the stresses of their daily lives are also growing in popularity. Mental health is becoming an increasingly key component of overall wellbeing, with one-third now interested in activities which can improve upon this. While such services may be rather too specialised for many hotels to offer in-house, working with trusted local partners is likely to be seen as an acceptable solution.

Health evaluations are set to represent an increasingly important part of wellness services in the years ahead. Innovation in this area is buoyant, with new methods of tracking and analysis enabling travellers to monitor bodily functioning such as sleep, dietary quality and longevity testing. The growing use of tools such as smart rings is becoming more normalised, particularly for those taking longer wellness trips. More than one-third (39%) are now interested in these types of analyses, rising to 44% in China.





BUZZ vs REALITY Edition 5: Wellness

Which of the following would interest you as part of a specifically planned wellness holiday?

Interest in different wellness activities on holiday

| | | Total |
|--|---|-------|
| Ĭ | Spa resorts/therapies (e.g. Thalassotherapy, Ayurvedic) | 58% |
| Ś | Nature immersions (e.g. canoeing, wild swimming) | 54% |
| | Physical treatments (e.g. acupuncture, lymphatic drainage, massage) | 51% |
| Ô | Activities/pursuits (e.g. hiking, golf) | 48% |
| gge | Exercise classes/workouts | 41% |
| | Health evaluations (e.g. dietary/sleep evaluations, posture/gait analysis) | 39% |
| - The second sec | Detox programs | 39% |
| | Beauty treatments | 37% |
| Å | Yoga retreats | 32% |
| 19 (C) | Mental health/performance/psychological support sessions | 32% |
| - Series | Mindfulness and digital detox | 31% |
| | Gender-specific retreats (e.g. menopause retreat, men's health) | 23% |
| Å | Other meditation retreats | 23% |
| | Weight-loss retreats | 22% |

Base: 389 APAC affluent/HNWIs who are interested in future wellness holidays

Source: Altiant/LuxuryOpinions





WORLD

OF HYATT

fig.16

What are your preferred methods of booking wellness activities while on holiday?

| Preferred booking methods for wellness activities | | | | | |
|---|-------|-------|-------|-----------|--------------|
| | Total | China | Japan | Singapore | Hong Kong |
| Directly through the hotel/resort's website | 72% | 78% | 73% | 72% | 62% |
| Directly at the spa/ | 45% | 54% | 35% | 51% | 33% |
| Through a dedicated wellness concierge | 43% | 59% | 37% | 45% | 19% |
| Via a travel or booking agent | 41% | 41% | 46% | 22% | 54% |
| Via a wellness or travel app | 3% | 4% | 1% | 4% | 5% |

Base: 389 APAC affluent/HNWIs who are interested in future wellness holidays

Source: Altiant/LuxuryOpinions

When it comes to booking wellness activities on holiday, the preferred methods for doing so are directly through the hotel/resort's website (72%) and at the spa or reception desk (45%).

In both cases, travellers from Hong Kong are the least likely to do so but, instead, are notably more likely than average to prefer booking via a travel or booking agent. Wealthy travellers from Japan are also more likely than average to favour this booking method.





Can you recall any exceptional or memorable wellness experiences you've had while on a holiday?

"I remember participating in a morning fitness activity during a trip, and the instructor corrected my movement posture so that my joint pain was eliminated and improved, which was an unforgettable experience."

Hong Kong female 55-64, HK \$ 8-20m Inv. Assets

"Participated in a week-long yoga retreat at a tropical location. Doing a yoga practice by the sea every morning and feeling the sea breeze and sun not only helps to relax the body and mind but also promotes spiritual awakening."

Hong Kong female 35-44, HK \$0-4m Inv. Assets

"My wife and I went on a road trip to Xingjiang, China. We were so touched by the raw natural beauty, the vastness of space, the complete loss of sense of time. There was no internet connection, so we had a very healing experience, spending time together slowly as we explored the beautiful landscapes"

Singaporean male 45-54, SG \$3.5-7m Inv. Assets

"We went on a 1-week trekking tour in New Zealand. Spending time on a hiking route with a good view was not only a good exercise, but also a stress relief and a peace of mind."

Japanese male 55-64, Y 75-150m Inv. Assets

ILTM

"I was impressed by a stay at a luxury hotel in Hangzhou. The hotel arranged a lot of health care projects, a tea ceremony experience, physical condition testing, traditional Chinese medicine consultations, all according to each customer's physical indicators to give suitable diet recipes. They also had health consultants to enable real-time tracking of physical status during my stay; so, the perfect combination of vacation and health!"

Chinese male 35-44, RMB 36-72m Inv. Assets



SECTION 5. Attitudes Towards Wellness Travel

Personalisation is increasingly important: 80% say that personalised wellness services are very important or essential to them, while 65% want bespoke consultations with wellness experts.

Almost three-quarters (70%) think that wellness holidays are suitable for the whole family, suggesting that hotels could benefit by also accommodating children's health needs.

Three-quarters are interested in slower, more relaxed trips which enable them to boost their mental performance and sense of purpose.

Despite technological advances, travel agents still have a key role to play, with 44% saying that booking holidays with agents/advisors is a good way to feel secure in their travel choices.

> WORLD OF HYATT

4/

30

Customised wellness to take centre stage

Many wellness travellers are increasingly moving away from 'one size fits all' services and towards something more personalised to their own needs and goals. Some 80% say that this is very important or essential, with high levels of response across three of the four countries, only dropping off in Japan (60%). While a degree of homogeneity across venues may be acceptable for some services, wealthy travellers are increasingly looking for treatments with specific benefits to them.

Similarly, personalised consultations with wellness experts (65%) and digital itineraries (62%) – implemented before or during a stay – resonate with the majority. The use of technology such as AI smart rings can provide increasingly comprehensive health data on individuals, with half saying that the use of cutting-edge technology (53%) and temporary facilities/tools (52%) carry a high level of importance.

While many travellers book wellness services spontaneously (see Fig. 10), the option of booking appointments before arrival is also widely appreciated. Almost three-quarters (73%) say this is either very important or essential to them, with the response only dropping off again in Japan. A similar share (70%) are interested in wellness experiences which they have never seen before, and for wellness and other services at the hotel to be sustainable (66%). Videos or descriptions on websites can be an effective way to showcase sustainable credentials or for travellers to understand what is involved in advance (especially for less well-known therapies or some of the newer innovations).

How important or unimportant are the following in relation to wellness services at hotels/resorts?

| | Total | China | Japan | Singapore | Hong Kong |
|--|-------|-------|-------|-----------|--------------|
| Wellness services tailored to personal health goals (e.g. reducing stress, improving fitness) | 80% | 93% | 60% | 80% | 77% |
| Ability to book wellness services or appoint- ments before arriving at the hotel/resort | 73% | 83% | 54% | 70% | 77% |
| Trying a new wellness experience which I have never seen before | 70% | 85% | 55% | 62% | 64% |
| Wellness and services at the hotel being sustainable/eco-friendly | 66% | 82% | 53% | 57% | 62% |
| Having personalised consultations with wellness experts | 65% | 79% | 37% | 67% | 66% |
| Having a personalised digital itinerary provided by the hotel/resort for your wellness activities during your stay | 62% | 78% | 46% | 47% | 65% |
| Availability of cutting-edge wellness technology | 53% | 74% | 45% | 36% | 42% |
| Temporary wellness tools or facilities (e.g. smart rings, sauna pods) | 52% | 58% | 49% | 44% | 54% |

Importance of different wellness services on holiday [any 'essential/very important']

Base: 389 APAC affluent/HNWIs who are interested in future wellness holidays

Source: Altiant/LuxuryOpinions





fig.18

Holidays to slow down and recharge

As wellness becomes even more important to many affluent/HNWIs, the majority (84%) are adopting a preventative and long-term view towards not only their own health, but also that of their family. Three-quarters (79%) view their holidays as a way of slowing down and relaxing and boosting their mental performance or sense of purpose (75%). Respondents from China are most likely to agree with these and, indeed, many of the other statements listed below.

There are two interesting deviations from this pattern. The first is for viewing holidays as a time to indulge rather than focus on health: from an overall score of 37%, this falls to just 19% among affluent Chinese. Wealthy Chinese individuals are also the least likely to say that they are unsure about which wellness services would suit them (19% vs 32% overall), indicating a high degree of self-confidence about looking after their own health.

Do you agree or disagree with the following statements?

Agreement with wellness-related statements [any 'strongly agree/agree'] fig.19 Hong Total China Japan Singapore Kong I am trying to improve my health for 84% 95% 68% 89% 77% later in life I am more interested in 'slower' and more 80% 86% 67% 81% 79% relaxing holidays nowadays I am interested in holidays which enable me 92% 63% 75% 63% to boost my mental performance and sense 75% of purpose A wellness holiday is suitable for the whole 70% 82% 58% 71% 62% family I am more likely to book a hotel if it has specialized wellness facilities (e.g. salt room, 67% 93% 49% 59% 55% ice baths) I am interested in the use of technology and 65% 87% 56% 52% 55% AI to improve my health I would be interested in following a bespoke 59% 86% 44% 49% 41% diet plan for the duration of a holiday I am willing to pay more for hotels which have wellness facilities in the bedrooms (e.g. 55% 72% 44% 52% 41% indoor bikes, yoga mats) Booking holidays with travel agents/advisors is 38% 44% 59% 42% 31% a good way to feel secure in my travel choices My holidays are a time to indulge rather than 37% 19% 58% 42% 39% focus on my health I am unsure about which wellness activities/ 32% 19% 47% 32% 43% services would be good for me

Base: 450 APAC affluent/HNWIs

Source: Altiant/LuxuryOpinions





WORLD 0 F HYAT1

Specialised facilities and space for wellness in rooms resonate

Wellness facilities and services can be an effective way for hotels to encourage guests to spend more on their trips. Two-thirds (67%) say that they are more likely to book a hotel if it has specialised options such as salt rooms or ice baths, rising to 93% among affluent/HNW Chinese. Three-quarters are also interested in wellness experiences which they have never seen before (Fig. 18), with numerous respondents saying that they enjoy unusual or niche wellness experiences on holiday.

Several also reported their preference for being able to do wellness activities such as yoga sessions in the comfort and privacy of their bedrooms, with 55% willing to pay more for this. This is one of the contributory factors why many hotel chains are reporting their largest and most expensive suites selling at a faster rate than smaller rooms. The affluents' desire for privacy and personal space continues to shape preferences, with many now spending more time relaxing in their own rooms.

Technology and travel agents can help deliver holistic wellness

The rapid improvements in technology can help hotels to deliver comprehensive and bespoke wellness more efficiently. While there is a clear need to retain the human touch of wellness, technology can be complementary. Two-thirds (65%) are interested in the use of technology and AI to improve their health by facilitating a more scientific approach. Hotels can use some of the various apps and equipment now available to deliver more precise and data-led services.

One such area relates to the dietary choices of travellers. While 37% say that their holidays are a time for indulgence, a balanced diet still appears to be a priority for many, especially the Chinese. More than half (59%) say that they are interested in following a bespoke diet plan while on holiday, rising to 68% of under-45s. The use of technology could help hotels to collaborate with guests on their hotel choices so that food is only one component of a more comprehensive wellness picture.

Despite technological advances, luxury, and particularly travel, should nevertheless aim to safeguard its human side. The inherent personal nature of tourism means that travel agents will have an ongoing role in advising on different trips and helping clients to realise their priorities and personal goals. Almost half (44%) say that agents are a good way to feel secure in their travel choices in general. The onus remains on advisors to stay aware of the constant state of evolution in the wellness industry and continue helping their clients to have unique and memorable trips.





Methodology and Sample

This piece of research focuses solely on affluent and HNW individuals' views on wellness travel. Altiant gathered quantifiable data from four Asian countries within their global community of affluent and high-net-worth individuals (HNWIs). A total of 450 affluent/HNWIs were interviewed across four APAC countries: initially in China (n=150) in October 2024, followed by Japan, Singapore and Hong Kong (n=100 in each) in March 2025.

All surveys were conducted online, using sampling methods and generating statistically significant insights based on gender, age groups and wealth levels. Participating members were exclusively extracted from the top tier of their country's income earners or wealth holders, with each being manually validated. For report concision and visualisation, only key findings are displayed here.

Across the whole sample, 53% identified as male and 47% as female. In age terms, the sample was split 55:45 for under-45s vs over-45s. Two-thirds of the total sample (66%) were the equivalent of USD millionaires (\$1m in investible assets), with the median investible assets equating to just over \$2m when normalised to USD.

ILTM

About ILTM

ILTM is a global collection of invitation-only events that bring together leading international buyers to meet and discover the most luxurious travel experiences.

Each event introduces an unrivalled selection of luxury travel brands to ILTM's extensive network of hand-picked luxury travel advisors through bespoke appointment programmes and networking sessions.

Alongside global flagship events in Cannes and Asia-Pacific, ILTM has three core local events: ILTM Arabia, ILTM Latin America and ILTM North America, as well as one specialist event, ILTM Africa.



About Hyatt

As we continue to grow, we don't lose sight of what's most important—people. Hyatt is a company that was built by family. It's a workplace where co-workers become friends. Every day we care for our guests. Care is at the heart of our business, and it's this distinct guest experience that makes Hyatt one of the world's best hospitality brands.

Hyatt Global Wellbeing prioritizes the wellbeing of our guests, members, customers and colleagues through memorable locations, distinctive experiences, and the opportunity to foster community.

. A LT I A N T

About Altiant

Altiant is a fieldwork entity specialising in quantitative market research, exclusively serving the luxury and wealth management sectors. Using its private global community of Affluent and HNW individuals, LuxuryOpinions®, Altiant empowers researchers, insight experts and marketing teams to make informed decisions. With its manually validated panel and sophisticated tools, Altiant swiftly transforms marketing questions into actionable insights.

It operates in 15+ countries, offering a consultative approach for hard-to-reach demographics and has been trusted by top-tier wealth and luxury organisations since 2014.

More info or additional results: contact@altiant.com



