

Unlocking Growth: Trends Report on Wellness Tourism in Africa

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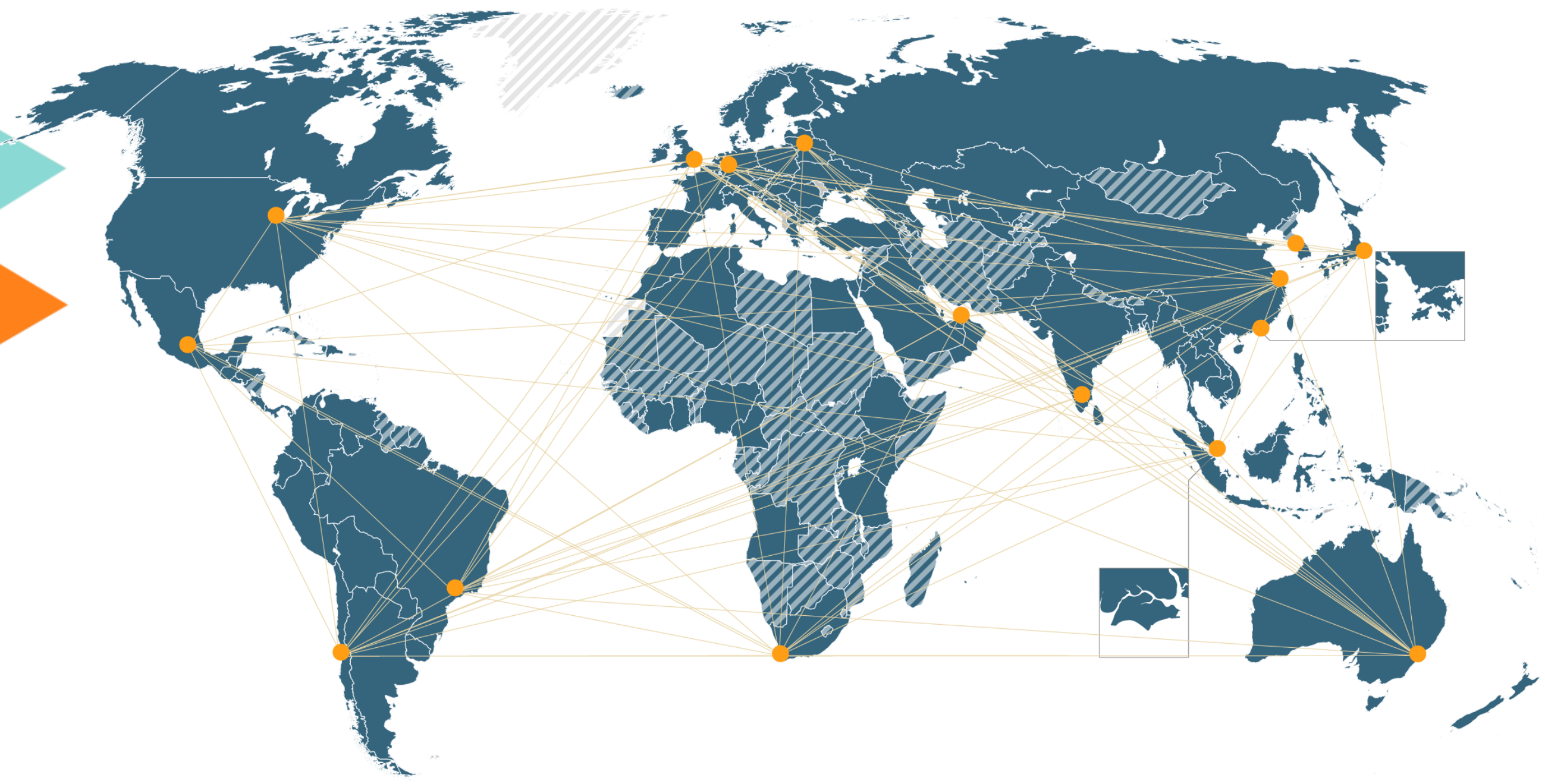


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service industries

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▨ demographic, macro- and
socio-economic data on
consumers and economies

CONTENT

- Global Tourism Performance & Spending Outlook
- Wellness Tourism Landscape
- Shifting Consumer Expectations
- The New Wellness Traveler
- Opportunities and Key Takeaways



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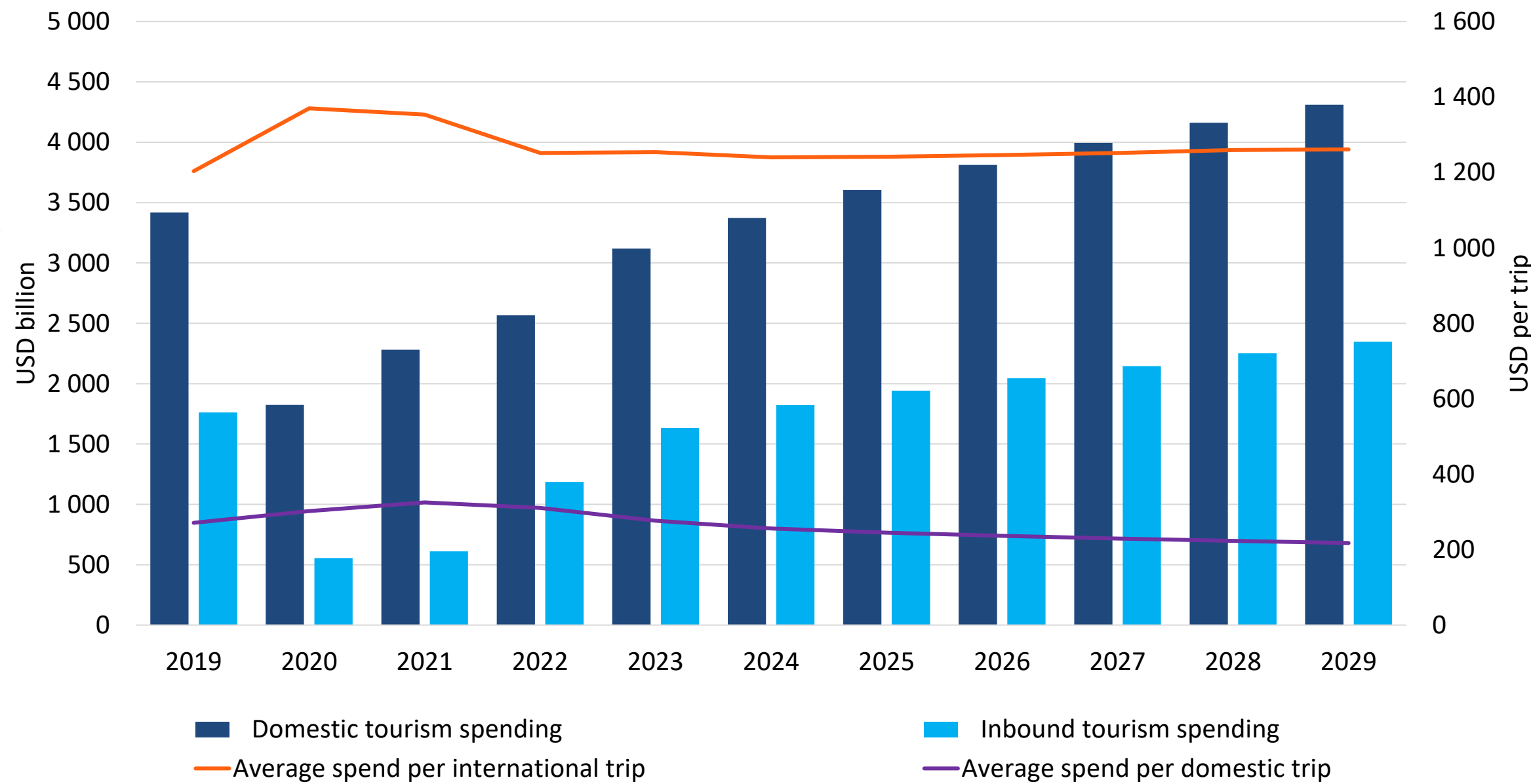
Global Tourism Performance & Spending Outlook



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Upswing In Global Tourism Spending Expected

World International and Domestic Tourism Spending 2019-2029



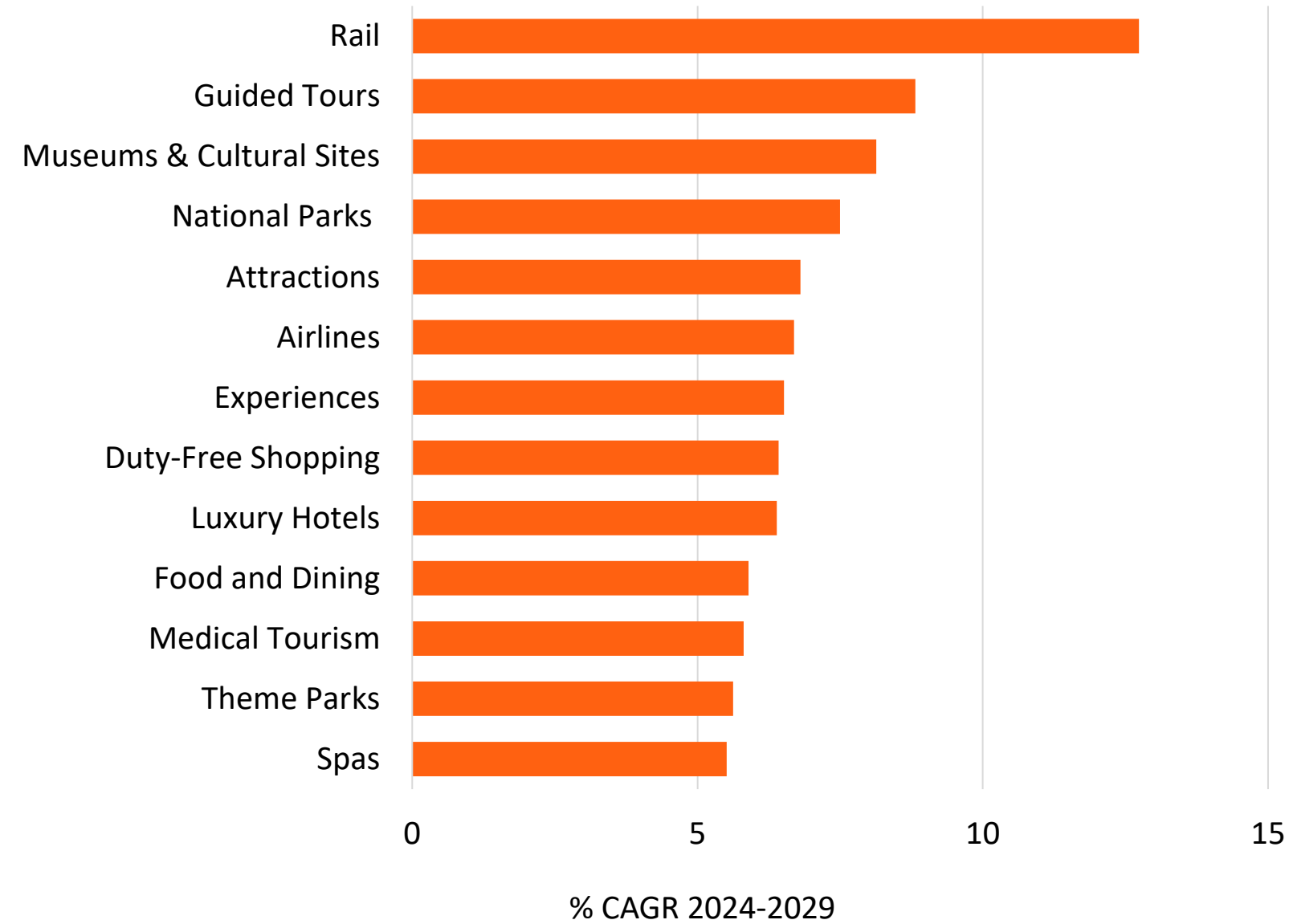
\$5.5 t
USD trillion spending
forecast in 2025
(international & domestic)

\$1.1 t
USD trillion value creation
opportunity

Source: Euromonitor International – Travel Forecast Model, Q1 2025

Mainstreaming Sustainable Travel To Boost Wellness Tourism

World Fastest Growing Travel Categories % CAGR 2024-2029



Source: Euromonitor International – Passport Travel, 2025 edition



Multi-trillion Travel Industry Propelled By Online, Personalisation And The Experiential



3.6
USD trillion
travel booking sales by 2029

73
% online travel sales by
2029

27
% consumers are using Gen
AI for more personalised and
relevant recommendations
(2024)

Source: Euromonitor International – Passport Travel, Voice of the Consumer: Digital Consumer Survey, fielded in April 2024 (n=19,956)

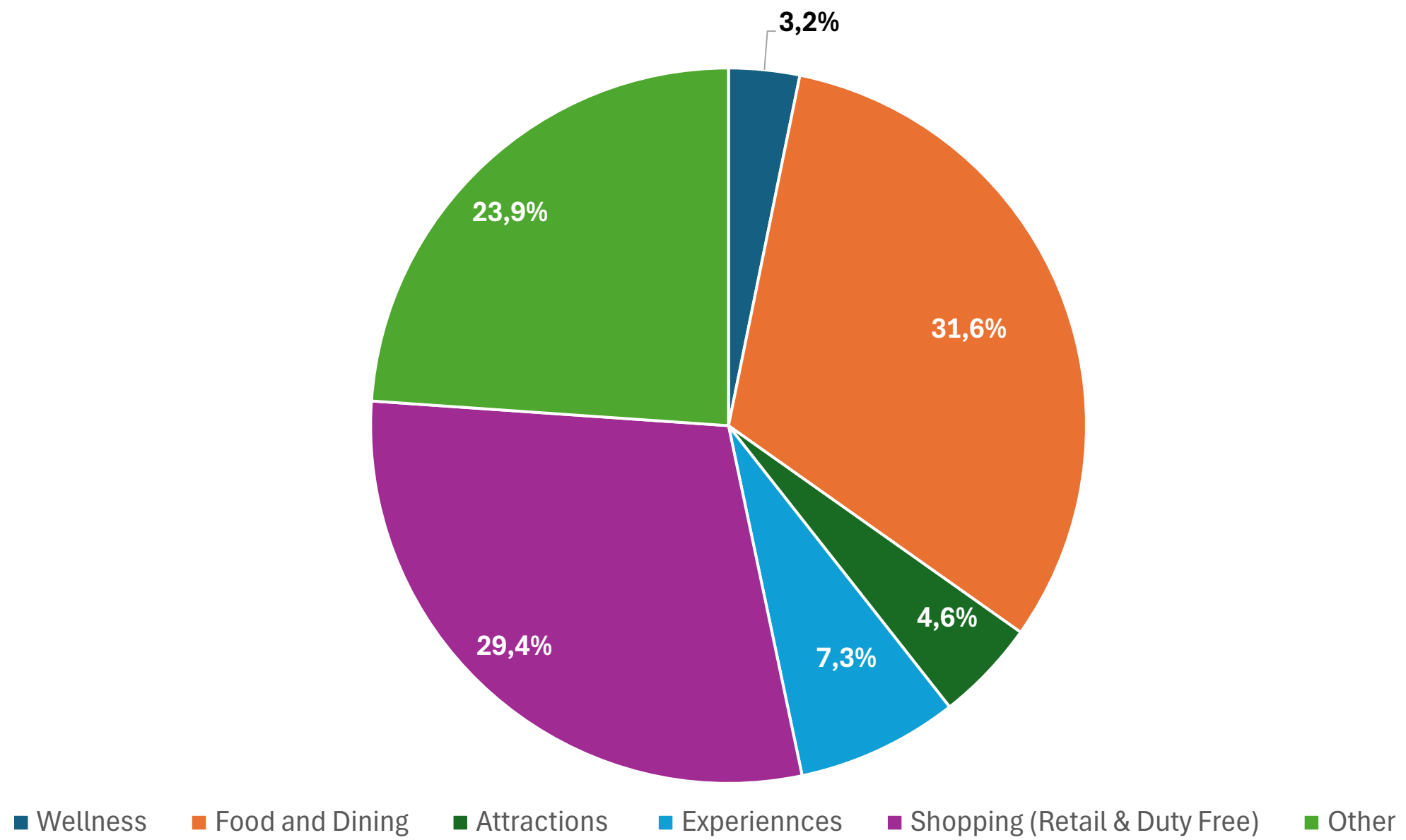
Wellness Tourism



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What Travelers Really Spend On After Arrival

Global In-destination Spending Value Share (Inbound + Domestic) 2024



3.1

USD billion in-destination spending (inbound + domestic in 2024)

+5,4%

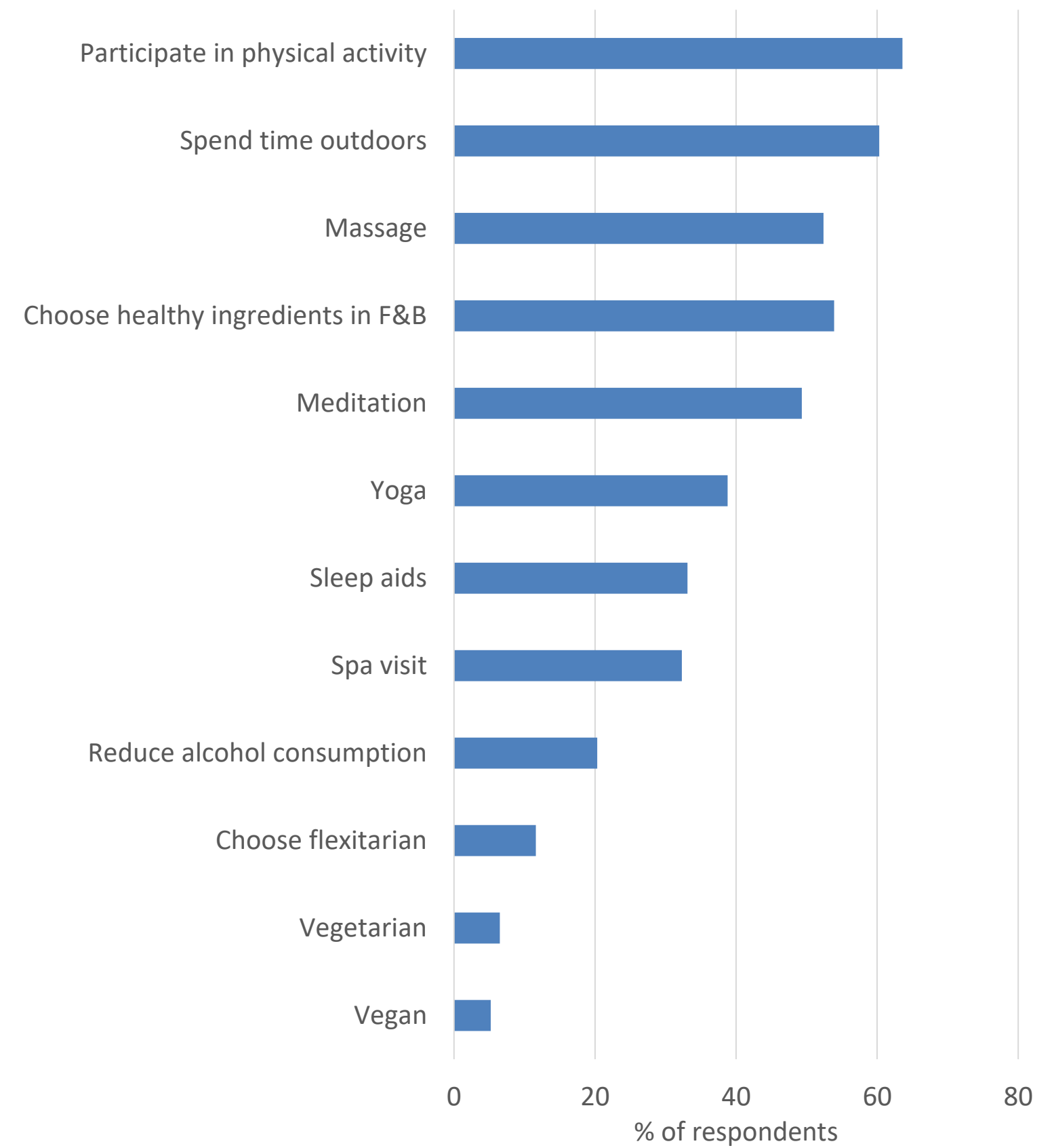
CAGR forecast for in-destination spend (2024–2029)

Source: Euromonitor International – Passport Travel, 2025 edition

Search For Experiential Immersion



Global Consumers Health and Wellness Habits 2024



Source: Euromonitor Voice of the Consumer: Travel Survey, fielded January to February 2024

Wellness Reimagined: Global Trends Reshaping Travel

Personalized Wellness



- Tailored programs using AI
- Wellness diagnostics
- DNA, biometrics, lifestyle

Technology-Driven Experiences



- Smart sleep pods, VR meditation
- App-based mindfulness
- Gamified fitness/wellness journeys

Holistic Environments

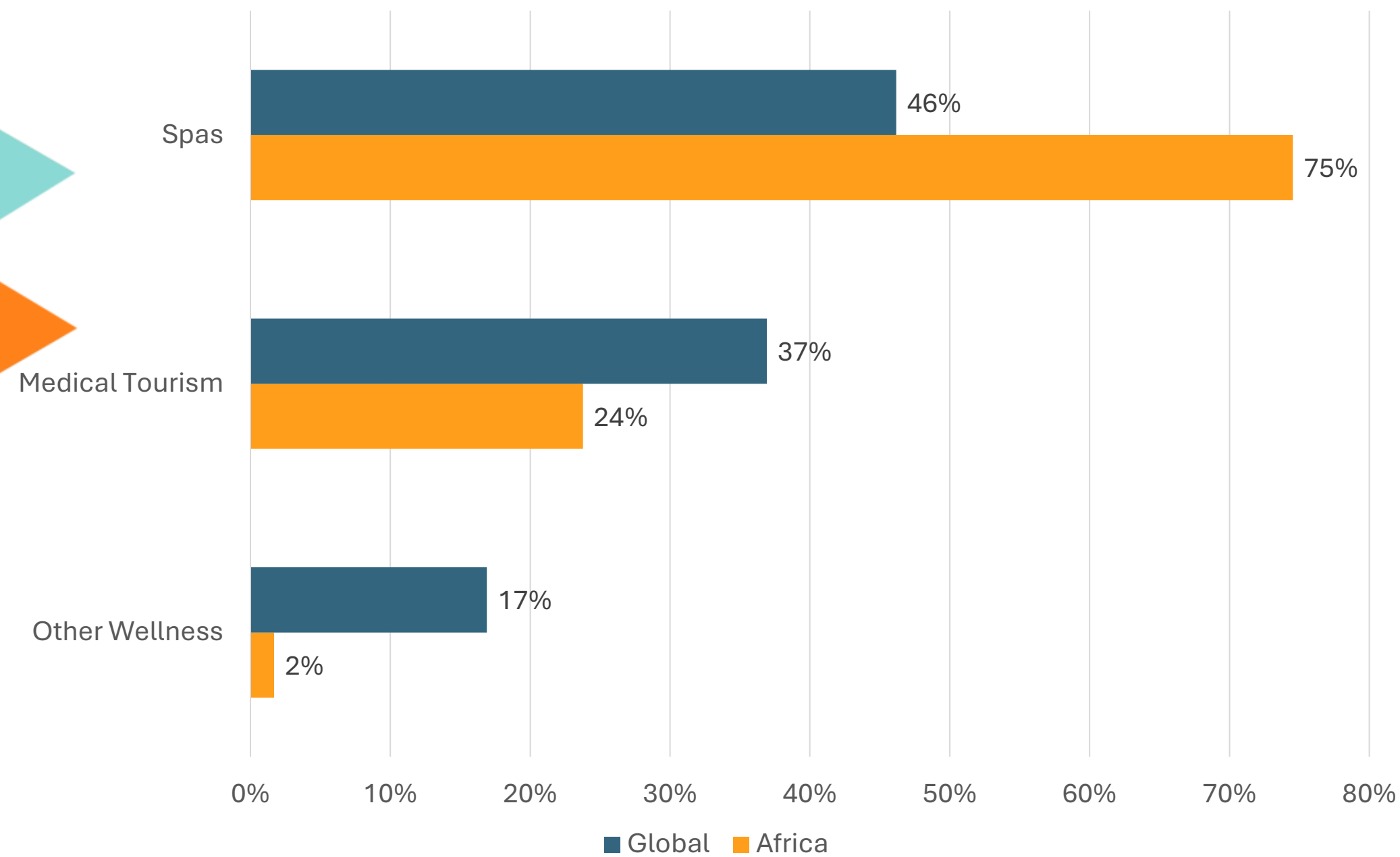


- Integrated design: sleep, food, air
- Nature, nutrition, movement
- Silent zones, stress-free design



Wellness in Africa: Where the Value Lies

Wellness Ecosystem Value Share by Category (%) 2024



Africa's wellness offering remains spa-heavy. Diversification into immersive wellness experiences is key to future growth

Source: Euromonitor International – Passport Travel, 2025 edition; African markets include South Africa, Kenya, Morocco and Egypt

Wellness in Action: Africa's Strategic Response to Global Trends

One & Only Nyungwe House (Rwanda)



Personalization through deep nature and heritage

Eco Egypt VR Campaign (Egypt)



Immersive eco-wellness through virtual reality

Elixir Wellness Retreat (Morocco)



Holistic harmony with desert traditions

Traveler Profiles and Preferences



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Eco-Adventurer



Blended Traveller



Leisure Seeker



Cultural Explorer



Traveller
Segmentation

Luxury Seeker



Digital Traveller



Wellness Worshipper

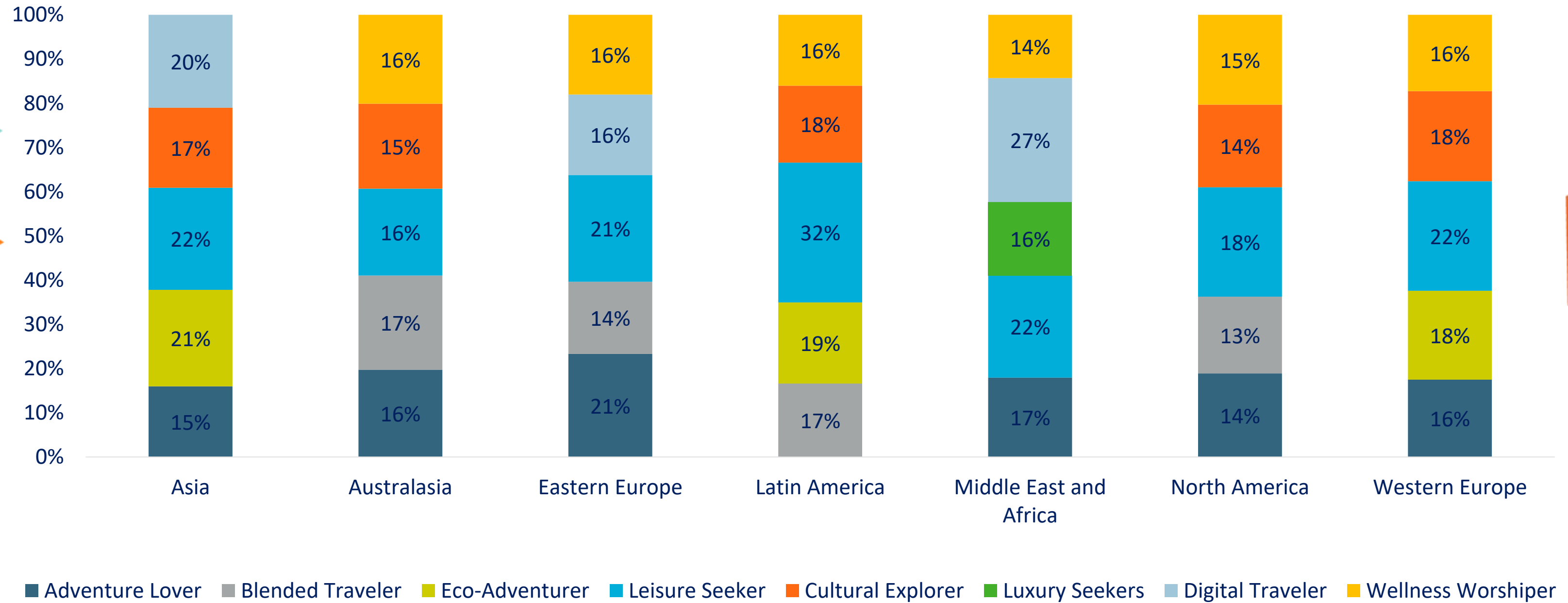


Adventure Lover



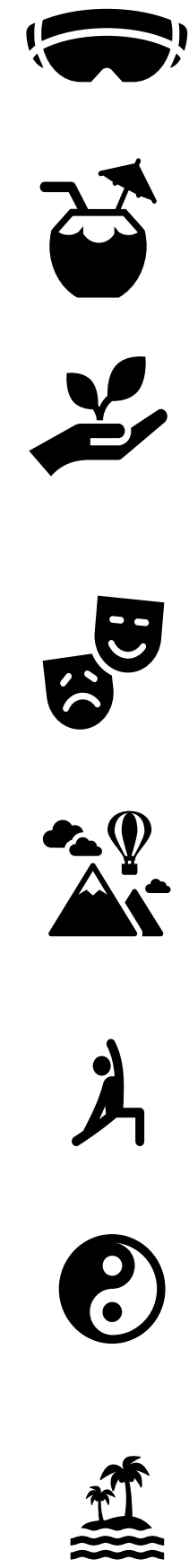
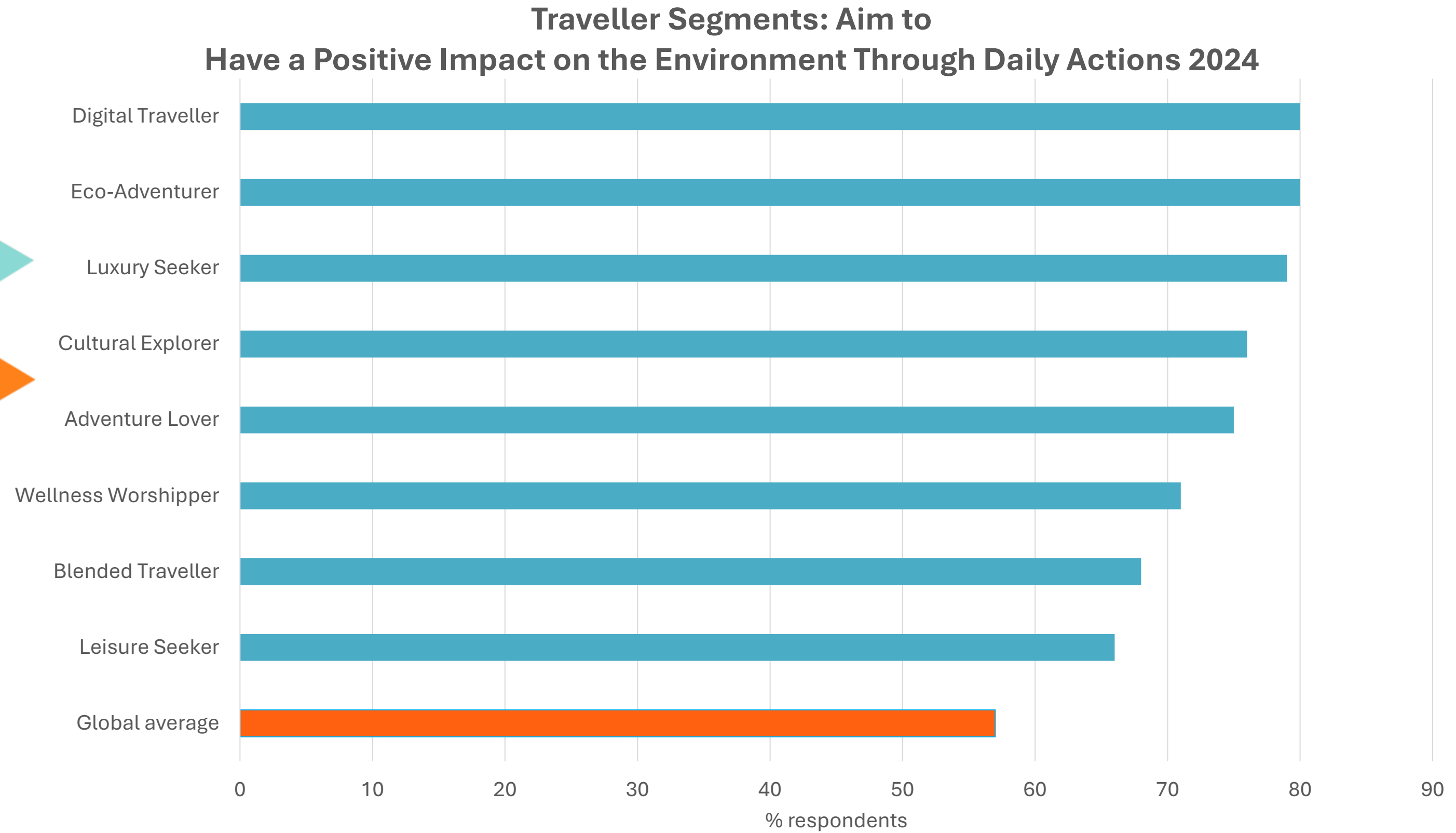
Shared Values, Higher Value: Why Understanding Travelers Matters More

Top 5 Traveler Profiles By Region (% of Respondents)



Source: Euromonitor International, Voice of the Consumer: Travel Survey, fielded in April 2024 (n=40,000)

Traveller Segments: High Engagement in Sustainability



Source: Euromonitor International: Voice of the Consumer: Travel Survey, fielded in March 2024



Gen Z: The Purpose-Driven Wellness Consumer



31%

of Gen Z Digital Travellers book travel in-store

67%

of Gen Z Wellness Worshippers are willing to pay more for relaxation

51%

Gen Z will pay at least 30% more for sustainable travel features

Source: Euromonitor International – Voice of the Consumer: Travel Survey, fielded in Jan-Feb 2024 (n=40,236)

Africa's Opportunities for Health and Wellness



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Africa: A Growth Powerhouse for Tourism

Global Inbound Arrivals + Domestic
Tourism

+5.4%

In RSP, 2024-2029 forecast CAGR

Africa Inbound Arrivals + Domestic
Tourism

+6.3%

In RSP, 2025-2029 forecast CAGR

Africa has natural assets, mobile infrastructure, and cultural depth to deliver on
Wellness trends in its own authentic way

Source: Euromonitor International, Travel System 2025 edition

Wellness Hotspots : Where The Opportunity Is Real

Morocco: Spa Heritage and Desert Retreats



- Spa culture anchored by Hammams, attracting travelers from France, UAE, and Spain
- 8% of visitor spend is spa-related, with wellness embedded in riads and coastal resorts
- Desert wellness retreats emerging, blending silence, stargazing, and Berber rituals

Kenya: Nature-Based Wellness



- 15% of tourist spend tied to wellness, led by safari + wellness hybrid experiences
- Eco-retreats offer yoga, bush meditation, and forest bathing in the Mara and Laikipia
- Growth in community-led wellness: traditional healing, storytelling, herbal therapies

South Africa: Medical Tourism



- 500000+ medical tourists annually, driven by world-class facility & services
- Post-treatment recovery in wellness lodges and spas
- Wellness linked to 10% of total tourist spend

What's Next: Strategic Opportunities For Africa

Immersive
Experience



Mental Wellbeing
Focus



Embedded
wellness



Thank You

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