

## **Global Wellness Real Estate Market - Focused Insights 2021-2030**

Market Report | 2025-06-03 | 132 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global wellness real estate market is expected to grow at a CAGR of 12.60% from 2024 to 2030.

### **KEY TAKEAWAYS**

- By Wellness Feature: The physical wellness segment holds the largest market share of over 43%.
- By End-User: The mixed-use development segment shows the highest growth of 13.28% during the forecast period.
- By Category: The new development segment accounted for the largest market share.
- By Area: In 2024, the urban areas segment dominated and held the largest market share.
- By Geography: North America dominates the global wellness real estate market with the largest share of over 40%, and the Middle East & Africa shows the highest growth of 14.62%.
- Growth Factor: The global wellness real estate market is set to grow due to growing awareness about health & well-being and a shift towards healthier work environments.

### **WELLNESS REAL ESTATE MARKET TRENDS & DRIVERS**

#### **Adoption of Smart Technology**

The adoption of smart technology is a significant trend in the global wellness real estate market. It includes some key factors such as integration of smart building or home systems, smart wellness for the community, and smart home technology for wellness. The smart sensors can easily monitor the quality of air, such as allergens and pollutants, in real time. The automated systems can help to adjust the filtration and ventilation to maintain the highest air quality. Smart lighting, such as circadian lighting, can improve productivity by improving sleep and mood conditions. The smart home technology can help with sleep monitoring. The smart devices and beds that can track sleep patterns can give personalized recommendations. The integration of home systems helps to promote a sleep condition, which includes adjusting temperatures, dimming lights, etc.

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## Biophilic Design

Biophilic design is a significantly growing trend in the global wellness real estate market. Biophilic design helps to increase productivity and maintain the health of a building's occupants. Incorporating natural elements such as indoor plants, green spaces, water features, sensory experiences, green walls, and natural light to enhance emotional and mental well-being. The trend is growing due to several factors, including rising awareness of nature's benefits, improved performance & productivity, increased demand for health spaces, sustainability, and enhanced market value.

## Growing Awareness about Health & Well-being

The growing awareness about health & well-being is a significant driver in the global wellness real estate market. The major factors driving this market growth include the increased awareness of environmental impact, changing consumer priorities, busy lifestyles, and rising spending on health & wellness. Increased specific needs and responses from developers. The people are more focused on holistic well-being, which has expanded to encompass mental, social, emotional, physical, and environmental aspects. This drives the demand for wellness spaces that can cater to all such dimensions. Thus, there is a significant demand for fitness-focused wellness spaces. The people are continuously focusing on health & wellness and maintaining the quality of life. There is a rising emphasis on preventive measures, in which the individual is looking for environments that can reduce the risk of illness and support healthy habits. It leads to growing the market of wellness real estate.

## Shift Towards Healthier Work Environments

Shift towards healthier work environments is a significant driver in the global wellness real estate market. The wellness features in the workspaces include circadian lighting, air purification systems, acoustic design, ergonomic furniture, fitness centers, plants & green spaces, healthy food options, and meditation & mindfulness spaces. As businesses continuously focus on the well-being of employees, the demand for workspaces that can support productivity and health will increase continuously. Companies are using wellness-focused spaces for retaining and attracting top talent, especially for younger generations who are more prioritizing work-life balance.

## INDUSTRY RESTRAINTS

### High Construction Cost

High construction cost is a major challenge in the global wellness real estate market. This is due to the specialized materials engineering & design, advanced technologies, labor costs, and certifications & standards. Wellness real estate incorporates various materials that are more sustainable or healthier, which will be more expensive than regular building materials. It includes advanced water filtration systems, non-toxic & natural insulation materials, and low-VOC sealants & paints for improved air quality. Wellness real estate required specialized engineering and design to incorporate the various features, such as acoustic optimization for reduction of noise, increased ventilation & natural light, and biophilic design.

## WELLNESS REAL ESTATE MARKET SEGMENTATION INSIGHTS

### INSIGHTS BY WELLNESS FEATURE

The global wellness real estate market by wellness feature is segmented into physical wellness, mental & emotional wellness, environmental wellness, and others. In 2024, the physical wellness segment held the largest market share of over 43%. The physical wellness segment encompasses sports facilities, fitness centers, and cycling/walking paths. Demand for these features in wellness real estate is rising due to increased focus on health and well-being, growing participation in fitness activities, integration

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of healthy lifestyles, the need for community-building spaces, and the promotion of active transportation.

Fitness centers often include well-equipped gyms and pilates studios within residential or commercial buildings, catering to the growing awareness of the benefits of regular physical activity. Cycling and walking paths are designed to encourage activities like jogging, walking, and biking, which support both physical health and mental well-being. The growing trend of active transportation further promotes these features, enhancing user experiences and contributing to the rising demand for wellness-focused properties. This, in turn, is driving overall growth in the wellness real estate market.

#### INSIGHTS BY END-USER

The global wellness real estate market by end-user is categorized into non-residential, residential, and mixed-use developments. The mixed-use development segment shows significant growth, with the fastest-growing CAGR of 13.28% during the forecast period. The mixed-use developments segment in the wellness real estate market emphasizes holistic living through features such as green parks and spaces, enhanced connectivity and walkability, community-focused technology, and sustainable design. There is a growing demand for access to parks, natural areas, and community gardens, which play a vital role in supporting mental well-being and recreation.

Consumers increasingly seek integrated communities where they can live, work, and access wellness amenities within proximity. Pedestrian-friendly infrastructure, public transportation access, and dedicated bike lanes are highly valued for reducing car dependence and promoting physical activity. Communal areas that foster social interaction and a sense of belonging are also key to residents' overall well-being. As businesses begin to incorporate wellness elements, such as healthy food outlets, spas, and fitness studios, into these developments, the demand for mixed-use wellness real estate is expected to grow significantly during the forecast period.

#### INSIGHTS BY CATEGORY

Based on the category, the new development segment holds the largest global wellness real estate market share. The new development segment in the wellness real estate market is driven by a growing understanding of how newly built environments impact overall health and well-being. This segment is gaining momentum due to factors such as the rise of integrated townships, increasing urbanization, business expansion, the e-commerce boom, demand for grade-A office spaces, sustainability, and the integration of smart technologies. There is a strong demand for energy-efficient and environmentally friendly commercial buildings, as well as for sustainable new constructions that incorporate a wide range of wellness features, resulting in more cohesive and impactful wellness-oriented spaces.

Additionally, the rising prevalence of health issues is prompting individuals to prioritize overall wellness, increasing the demand for dedicated wellness facilities such as meditation rooms, yoga studios, and fitness centers. Rapid business growth and urban development, particularly in tier-2 and tier-3 cities, are further fueling the need for new retail spaces, office buildings, and mixed-use developments. Collectively, these trends are driving substantial growth in the new development segment of the wellness real estate market.

#### INSIGHTS BY AREA

Urban areas hold the largest share of the global wellness real estate market, driven by higher population density and the resulting demand for new construction and housing improvements. These areas often feature a mix of new and aging homes, condos, and apartments, creating a continuous need for repairs, renovations, and upgraded living spaces. In developed countries such as the U.S. and the U.K., urban residents prioritize both aesthetic appeal and functionality, and with higher average incomes, they are more capable of investing in wellness-focused construction and home enhancement projects.

The growing focus on improving the quality of life in urban settings is fueling demand for wellness real estate. Concerns over noise and air pollution are pushing residents to seek quieter living environments equipped with advanced filtration systems. Additionally, there is a strong desire for communal spaces that promote social interaction and help reduce feelings of urban

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isolation. To foster a deeper connection with nature, developers are incorporating natural elements, such as sunlight, indoor plants, and scenic views, into urban developments. These trends are collectively accelerating the growth of the wellness real estate market in urban regions worldwide.

## GEOGRAPHICAL ANALYSIS

North America dominates the global wellness real estate market with the largest share of over 40%. The North American wellness real estate market is driven by a range of factors, including a growing focus on health and wellness, an aging population, technological advancements, rising stress levels, wellness tourism, busy lifestyles, and increasing awareness of sustainability. Higher disposable incomes across many parts of the region enable greater investment in premium, wellness-focused properties. There is a strong and growing demand for healthy, eco-friendly developments that align with consumer priorities around well-being and environmental responsibility.

In 2024, the U.S. and Canada emerged as the leading markets in the region, with the U.S. contributing the highest revenue share due to its status as the largest economy in North America. The country's rising awareness of health issues and higher spending on wellness-related activities are key factors propelling market growth. Across the region, there is a strong emphasis on fitness, preventive healthcare, and maintaining healthy lifestyles. The increasing demand for eco-conscious building practices and wellness-oriented design features continues to drive the expansion of the wellness real estate market in North America.

The Middle East & Africa wellness real estate market is growing significantly, with the fastest-growing CAGR of 14.62% during the forecast period. The market is experiencing growth due to increasing health consciousness, cultural preferences, rising disposable incomes, economic development, and the expansion of wellness tourism. Additional drivers include corporate wellness initiatives, government investments in tourism, and a growing focus on leisure and luxury properties. There is significant demand for high-end properties across the region, particularly those offering luxury wellness amenities. The rapid growth of the travel and tourism sector is also fueling demand within the hospitality industry, further propelling the expansion of the wellness real estate market.

## VENDOR LANDSCAPE

The global wellness real estate market report consists of exclusive data on 27 vendors. In the wellness real estate market, many local and global players are present. The demand for wellness features in properties is rising in the market across the globe. Thus, the established companies are focusing on the development of new high-end and luxury buildings to attract affluent clientele. In this market, demand for green building practices has been rising in the last few years. Thus, most of the companies are targeting eco-conscious individuals. Due to the rising government regulations and intense competition among leading players, the companies are focusing on offering a greater number of wellness-focused amenities.

Companies are constantly focusing on the use of sustainable materials and elements to attract a greater number of consumers. It includes biophilic design, indoor air quality, noise reduction, and many more. Many of the companies are targeting the workspaces and increasing awareness about the importance of wellness features in their workspaces to clients to improve employee productivity. Many companies are offering new wellness-focused commercial spaces along with renovation services.

### Key Vendors

- Brookfield Asset Management
- CBRE Group, Inc.
- China Vanke Co., Ltd.
- Delos Living
- Skanska

### Other Prominent Vendors

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- VINCI SA
- Welltower Inc.
- Biofilico Ltd
- DPZ CoDesign LLC
- EFFEKT Arkitekter ApS
- Gensler
- Humaniti
- Legacy S Wellness Residences
- SANSIRI PUBLIC CO., LTD
- Serenbe
- Signify Holding
- Tata Housing Development Co. Ltd.
- TOKYU LAND CORPORATION.
- Velvaere Park City

#### SEGMENTATION & FORECASTS

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    - o□US
    - o□Canada
  - APAC

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KEY QUESTIONS ANSWERED:

1. How large is the global wellness real estate market?
2. Which wellness features segment has the largest share in the global wellness real estate market?
3. Which end-user segment provides more business opportunities in the global wellness real estate market?
4. Which region holds the largest share in the global wellness real estate market?
5. Who are the major vendors in the global wellness real estate market?

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