

Outdoor Wellness Report

How outdoor space became the fastest-growing wellness asset — at home and in hospitality.

2026 · For Homeowners, Operators & Investors



Key Findings *at a Glance*

Where wellness demand stands in 2026 — and where it's heading.

\$876B

Wellness real estate (2025)
forecast \$1.8T by 2030 · GWI

10–25%

Wellness home price premium
mid- and upper-market properties · GWI

\$893.9B

Wellness tourism (2024)
to \$1.38T by 2029 · GWI Monitor

6.1%

Of global GDP is wellness
\$6.8T in 2024, 7.1% by 2029 · GWI

KEY INSIGHT

Wellness has stopped being something people buy and become something they build. Real estate is now the fastest-growing wellness sector on earth — and it pays twice: a measurable premium on the asset, and a measurable premium on what guests will pay to use it.

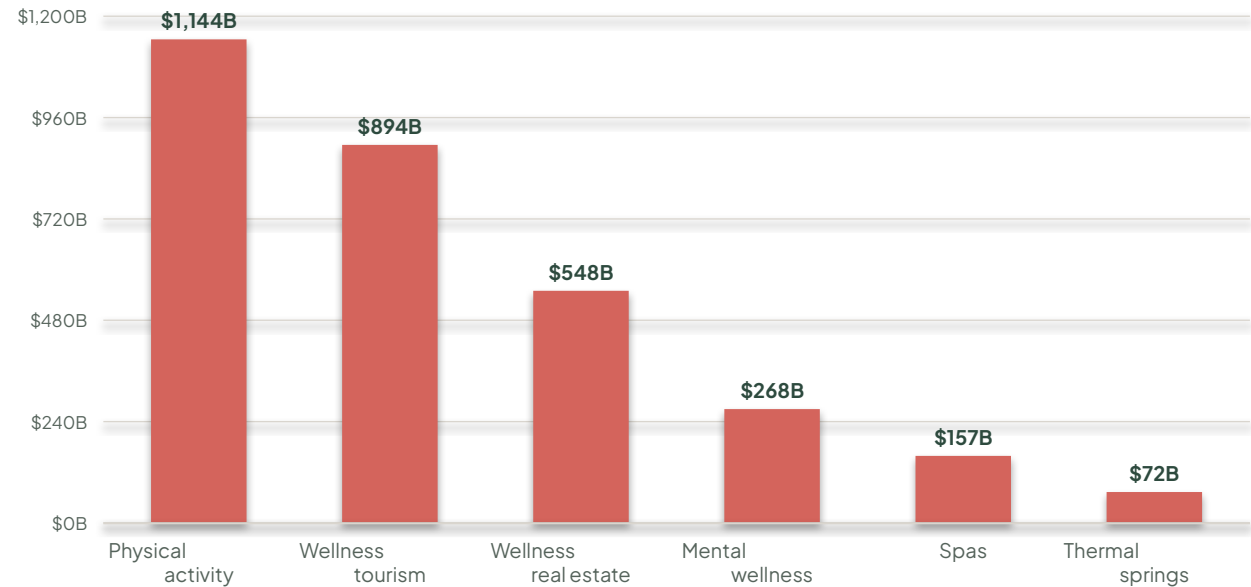


Sources: Global Wellness Institute, Wellness Real Estate (May 2026) · GWI Global Wellness Economy Monitor (November 2025) · Global Wellness Institute data via National Association of Realtors (October 2025).

A \$6.8 Trillion *Economy*

Wellness sector values, 2024 · Global Wellness Economy Monitor.

Market value, 2024 (USD billions)



2029 forecast: physical activity \$1,463.6B · wellness tourism \$1,383.3B · wellness real estate \$1,114.0B · mental wellness \$434.6B · spas \$228.0B · thermal springs \$115.6B.

READING THE DATA

The wellness economy reached \$6.8 trillion in 2024 — 6.1% of global GDP, forecast to reach \$9.8 trillion and 7.1% by 2029. Growth is not evenly spread: real estate (19.5% a year), spas (14.6%) and tourism (13.8%) all outpaced the 6.2% average, and all three are about physical places rather than products.

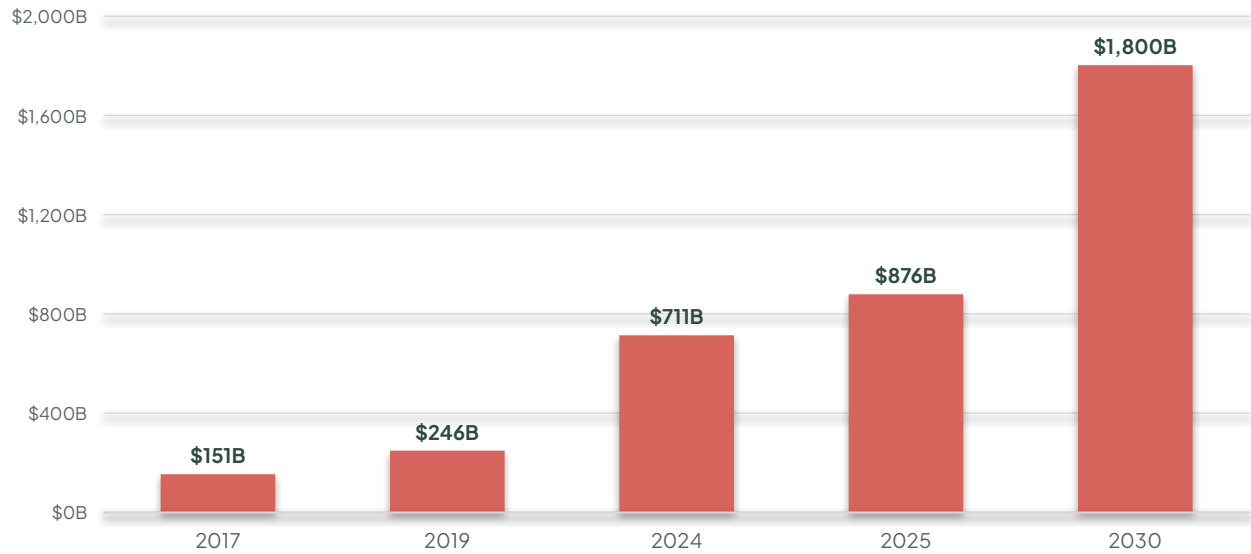
Independent corroboration: Grand View Research (June 2026) sizes wellness tourism at \$990.4B in 2025, growing 9.3% a year to 2035 — within a fifth of a point of GWI's 9.1% forecast, on a separately constructed model.

Sources: GWI Global Wellness Economy Monitor (November 2025) · Grand View Research, Wellness Tourism Market (June 2026). GWI restated wellness real estate to \$711B for 2024 in its May 2026 sector report on a revised methodology; Monitor values are used here so sectors compare like for like.

The Fastest-Growing Sector

Global wellness real estate market value, 2017 → 2030 · Global Wellness Institute (2026).

Market value (USD billions)



23.6% compound annual growth 2019–2025; forecast 15% a year to 2030.

\$350B

Asia-Pacific
largest region

\$274B

North America
US alone \$254B

\$205B

Europe
UK \$51B · France \$35B

WHY IT MATTERS

Wellness real estate has grown roughly six-fold since 2017 — faster than any other wellness sector and faster than the wellness economy as a whole. Saudi Arabia and the UAE alone have over 555,000 wellness-focused residential units in the pipeline, driven by national health and sustainability mandates.

Sources: Global Wellness Institute, Wellness Real Estate (May 2026). 2030 value is GWI's published forecast.

What's Driving *Demand*

Four forces moving wellness out of the clinic and into the home and the hotel.

1 Mental wellness is the pressure point

Mental wellness grew 12.4% a year to 2024. Within it, meditation and mindfulness is the fastest-moving sub-sector at 18.9% a year — demand for a calm, dedicated place to practise, not another app.

2 Wellness moved into the home

The pandemic, in GWI's words, "ignited a new awareness about the extraordinary impact that external environments have on our physical and mental health." Home is now where wellness gets designed in.

3 Guests will pay for it

Wellness tourism grew 13.8% year-on-year and spas 14.6% — both well ahead of the 6.2% wellness-economy average. Operators compete on wellness because guests book on it.

4 Policy is now a tailwind

GWI reports that "national priorities and government mandates are driving the development of a healthy and sustainable built environment" — with 555,000+ wellness units in the Gulf pipeline alone.

THE PATTERN

Every one of these drivers points at the same thing: a physical, dedicated, calm space — and increasingly one that is outdoors and in daylight rather than another room indoors.



Sources: GWI Global Wellness Economy Monitor (November 2025) · GWI Wellness Real Estate (May 2026).

The Evidence for *Nature*

The wellbeing case for outdoor space is unusually well documented.

120 min

A week in nature
the threshold for good health & wellbeing

19,806

Adults surveyed in England
White et al., Scientific Reports (2019)

18.9%

Meditation & mindfulness growth
fastest-growing mental wellness sub-sector

82%

US consumers call wellness a priority
McKinsey survey, n=5,000+ · US, UK, China

WHAT THE RESEARCH FOUND

A study of 19,806 adults in England, published in Scientific Reports, found that the likelihood of reporting good health or high wellbeing became significantly greater at 120 minutes a week or more in natural environments, peaking between 200 and 300 minutes with no further gain beyond. It made no difference whether the time came in one visit or several, and the threshold held across age, income, illness and neighbourhood.

The practical problem is weather. Two hours a week outdoors is easy in July and close to impossible in February — which is where a weatherproof, daylight-filled outdoor room changes the arithmetic.



Sources: White, M.P. et al., "Spending at least 120 minutes a week in nature is associated with good health and wellbeing", Scientific Reports 9, 7730 (2019) · McKinsey & Company, The Trends Defining the Global Wellness Market (January 2024) · GWI Monitor (November 2025).

At Home: *The Premium*

What wellness design is worth on a home — and what buyers actually ask for.

10–25%

Wellness home price premium
mid- and upper-market properties · GWI

4.4–7.7%

Commercial rental premium
per sq ft, wellness-certified buildings · MIT / GWI

What buyers say they want

Feature	Share of buyers
Modern, well-equipped kitchen	29%
Energy efficiency	25%
Clean water filtration	22%
Clean air filtration	22%
Solar / backup power	18%

HOW TO READ THESE PREMIUMS

These figures are measured on homes and communities designed around wellness as a whole — no single addition delivers them on its own. What they show is direction of travel: buyers are paying for wellness at home, and a year-round outdoor room is the least disruptive way to add it.



Sources: Global Wellness Institute data reported via the National Association of Realtors (October 2025).

In Hospitality: *The Return*

Hotel performance by wellness intensity, 2025 · RLA Global / HotStats, 13,000+ hotels.

Property type	ADR	RevPAR	GOPPAR	Occupancy
Minor Wellness (<10% of revenue)	\$250	\$170	\$99	—
Major Wellness (>10% of revenue)	\$232	\$161	\$89	69.4%

RevPAR at Minor Wellness properties rose 6% year-on-year and total revenue per room 5%. In the US, Minor Wellness GOPPAR rose 6.1% while Major Wellness GOPPAR fell 14.7%.

THE COUNTER-INTUITIVE FINDING

In 2025, hotels with a modest wellness offering overtook full-spa properties on ADR, RevPAR and GOPPAR simultaneously — the first time in the series. These are two different groups of properties rather than a controlled comparison, so it does not prove a smaller offer causes better returns. It does undercut the assumption that wellness revenue requires a capital-heavy spa floor.

Where a dome earns its keep

Treatment room

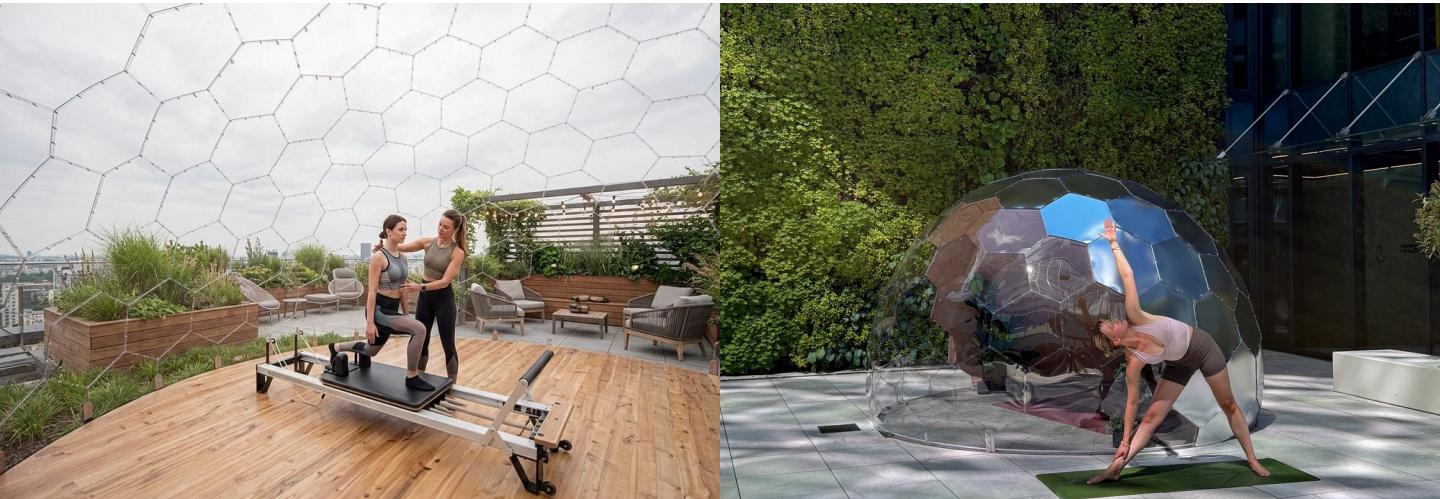
A private, daylit massage or beauty room with no building work.

Movement studio

Yoga, breathwork and small group classes as a bookable amenity.

Signature space

A photographable room that differentiates the listing itself.



Sources: RLA Global 2025 Wellness Real Estate Report, produced with HotStats, covering 13,000+ hotels worldwide (published July 2026).

What a Wellness *Space* Costs

Hypedome pricing, USD, valid July 2026. Shipping, tariffs and customs included.

Model	Floor area	Clear / Grey	Satin + Clear	Wood lining
Hypedome S	10 m ² / 108 sq ft	\$4,950	\$6,985	\$1,595
Hypedome M	17 m ² / 183 sq ft	\$6,995	\$9,350	\$2,145
Hypedome L	30 m ² / 323 sq ft	\$11,750	\$16,850	\$3,035

The same capital buys a fraction of a conventional spa fit-out. The dome arrives as a kit and is assembled by two people in 5–9 hours, with no foundations.

5–9 hrs

Self-assembly
two people, no foundations

Year-round

Four-season use
solid polycarbonate, weatherproof

READING THE NUMBERS

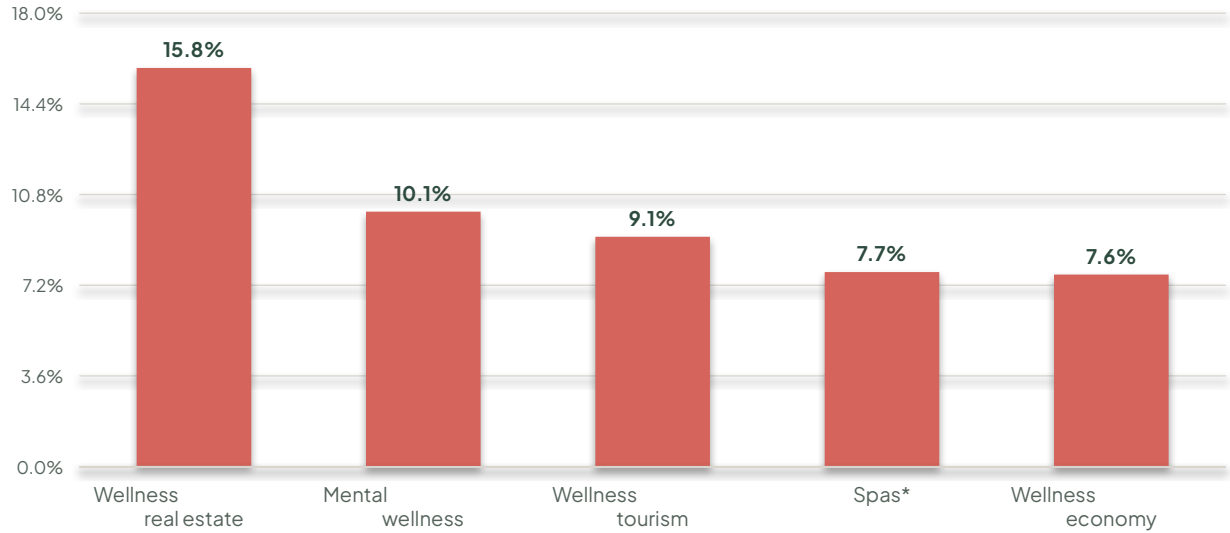
A wellness space is one of the few premium additions where the whole cost is visible up front and the installation is reversible. There is no construction risk and no wet trades, and the asset can be relocated or resold — a materially different proposition from building a spa room.

Sources: Hypedome Price List 2026 and Technical Specifications 2026 (July 2026). USD, US shipping included in the listed shipping cost.

Where It's *Heading*

Forecast annual growth to 2029 · Global Wellness Economy Monitor.

Forecast compound annual growth, 2024 → 2029 (%)



Wellness real estate is forecast to grow at roughly twice the rate of the wellness economy as a whole. GWI's 2026 sector report puts it at 15% a year to 2030, reaching \$1.8 trillion.

THE DIRECTION OF TRAVEL

Wellness spending is shifting from consumables toward places — and those places are increasingly expected to be part of the property rather than a destination you travel to.

Sources: GWI Global Wellness Economy Monitor (November 2025); GWI Wellness Real Estate (May 2026). *No separate spa forecast rate is published; 7.7% is the compound rate implied by GWI's own 2024 (\$157.4B) and 2029 (\$228.0B) spa values.

Why the Space *Is a Dome*

What the research asks for, and what a frameless geodesic dome answers.

What the evidence calls for	What a Hypedome delivers
Time in nature, year-round	Solid polycarbonate shell, four-season, daylight on every side
A dedicated, calm room	10–30 m² of single-purpose space, separate from the house
No construction risk	Self-assembly in 5–9 hours, no foundations, relocatable
A premium that reads instantly	Satin finish and Okoumé Hype.Wood Lining — a finished interior
Something guests will pay for	A signature, photographable space, not a generic add-on

The satin shell and the timber lining are what separate this from a garden pod: from outside it reads as sculpture, from inside as a finished room — which is what makes the premium credible in both markets. A homeowner sees an asset; an operator sees a rate.

THE CONCLUSION

Wellness is now built, not bought — and the market prices it in three independent places: a 10–25% premium on mid- and upper-market wellness homes, 4.4–7.7% higher commercial rents per square foot, and stronger performance at hotels with a wellness offering. A Hypedome is the least disruptive way into that category — a finished, four-season wellness room installed in a day, at a fraction of built-space cost.



Sources: GWI (2025, 2026) · GWI via NAR (2025) · RLA Global / HotStats (2026) · Hypedome Technical Specifications 2026.

REFERENCES

Sources & Notes

Every figure in this report is traceable to a named primary source.

Global Wellness Institute — Wellness Real Estate (May 2026)

Sector sizing 2017–2030, regional and country splits, Gulf pipeline.

globalwellnessinstitute.org

GWl — Global Wellness Economy Monitor (November 2025)

Values and growth rates for all wellness sectors, 2024 and 2029.

globalwellnessinstitute.org

GWl — Wellness Lifestyle Real Estate & Communities

Price premiums: 10–25% residential (mid/upper market); 4.4–7.7% commercial per sq ft, after MIT.

globalwellnessinstitute.org

National Association of Realtors (October 2025)

Buyer feature priorities and the Rancho Mission Viejo resale comparison.

nar.realtor

RLA Global / HotStats — Wellness Real Estate Report (July 2026)

Hotel ADR, RevPAR, GOPPAR and occupancy by wellness intensity; 13,000+ hotels.

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White, M.P. et al., Scientific Reports 9, 7730 (2019)

Peer-reviewed study, n = 19,806, on nature exposure, health and wellbeing.

nature.com/articles/s41598-019-44097-3

Grand View Research — Wellness Tourism Market (June 2026)

Independent sizing of wellness tourism: \$990.4B (2025), 9.3% CAGR to 2035.

grandviewresearch.com

McKinsey & Company — Global Wellness Market (January 2024)

Consumer survey, n = 5,000+ across the US, UK and China, on wellness prioritisation.

mckinsey.com

Hypedome Price List 2026 · Technical Specifications 2026

Product pricing, dimensions, materials and assembly data.

hypedome.com

METHODOLOGY

Figures are reported as published; none have been interpolated to complete a series. Where two GWl releases give different values for wellness real estate — \$548.4B (Monitor, November 2025) and \$711B (Sector Report, May 2026) for the same year — both are shown in their own context rather than blended, and the source is stated on each page. Growth rates are compound annual unless stated otherwise. The one derived figure, the implied spa growth rate on page 10, is labelled as such. Property premiums are measured on wellness-designed homes, communities and certified buildings — not on any single addition — and are quoted here to show market direction, not to attribute a premium to one product. Hyedome figures are the company's own published data.

Compiled July 2026. Figures current at time of publication.



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