

Arctic Bear Wellness



Bali Market Analysis

Wellness zone concept

+6285339107323

@arctic_bear_baths



Why Wellness Increases Revenue

The purpose of the analysis is to show that wellness is not an option, but a financial upside, measurable in price and occupancy.

We compare:

- Similar locations and segments
- Same number of bedrooms/
accommodation format

The only variable is the presence
of wellness infrastructure

Analysis metrics

- ADR - average daily rate
- OCC - occupancy rate

Data sources:

- Airbnb listings (like-for-like
units)
- AirDNA / AirROI market
benchmarks
- Booking.com (hotels, same
districts)

5BR Villas

Wellness vs No Wellness (5BR, Seminyak)



Wellness Villa - Bvilla Spa Five [link](#)

ADR: \$300–550

Occupancy (OCC): 50–65%



Villa without Wellness [link](#)

ADR: \$180–300

Occupancy (OCC): 40–55%

Conclusion: Wellness infrastructure increases ADR by ~40–60% and improves occupancy within the same location and bedroom segment.



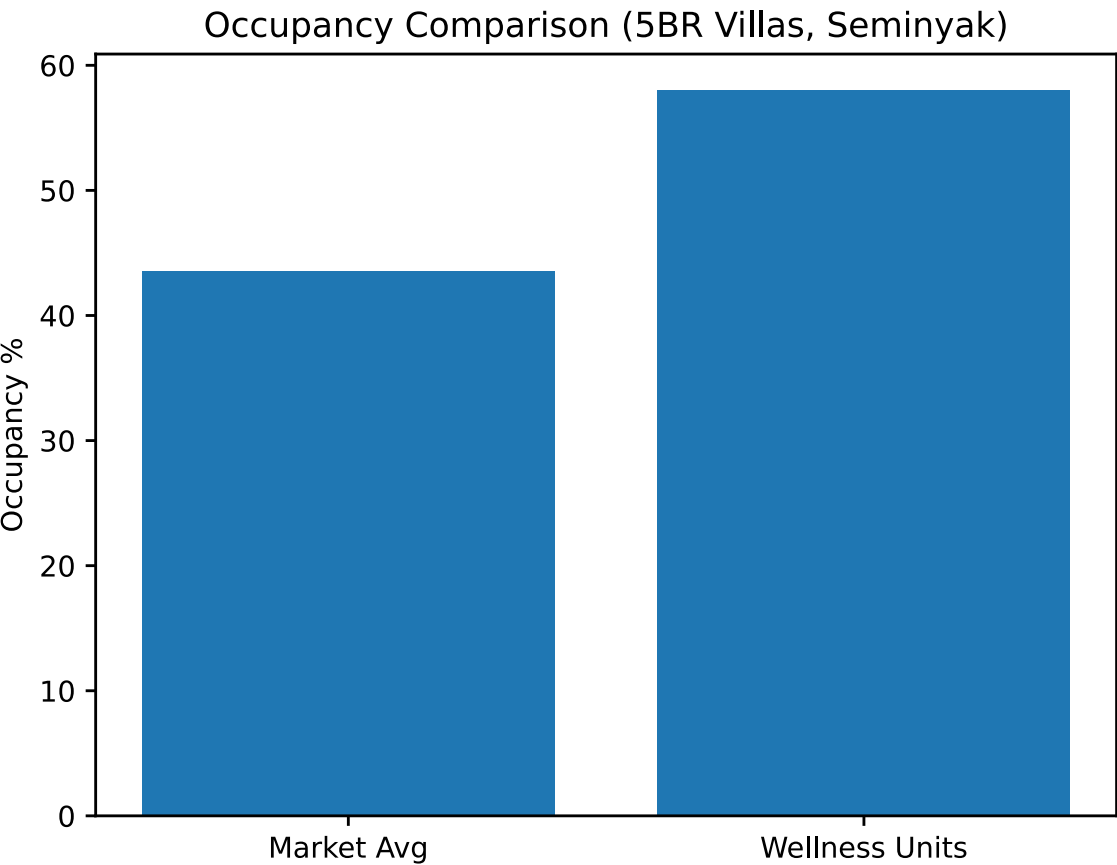
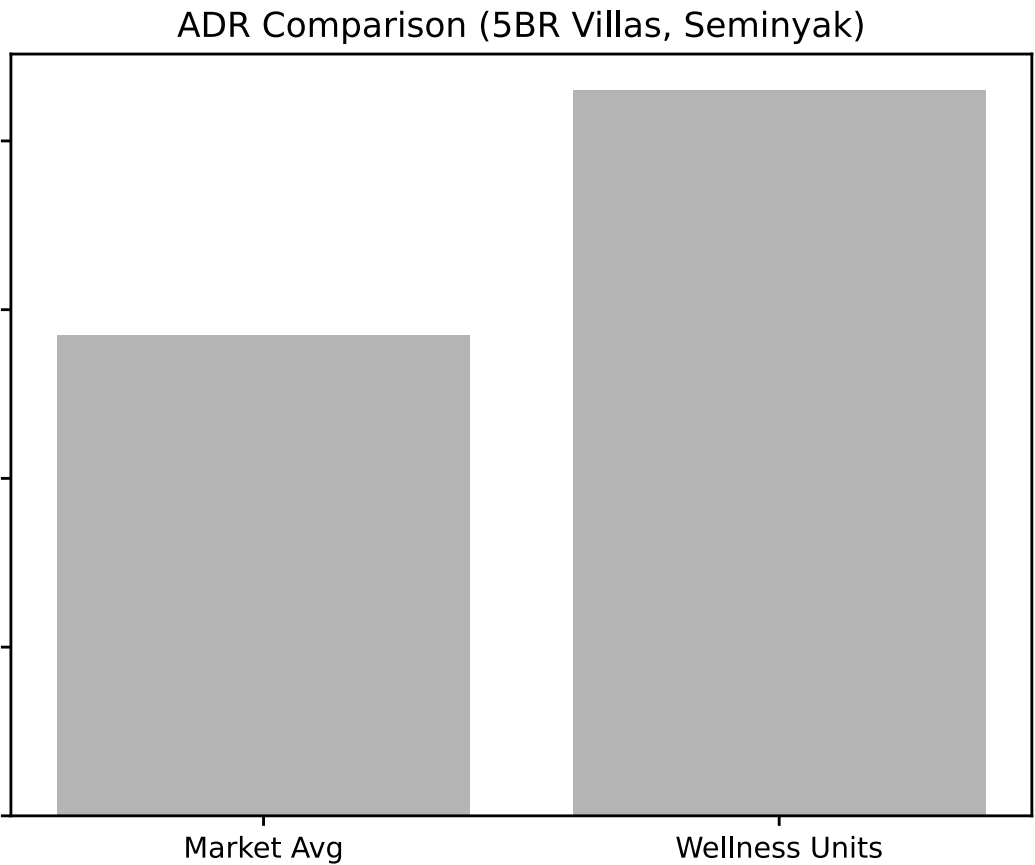
Market Average vs Wellness Villas

Seminyak, 5BR Segment

Average ADR: ~\$285

Average OCC: ~43.5%

Wellness Villas outperform the market average both in price per night and occupancy due to differentiation and premium positioning.



ADR Performance Tiers

5BR Villas, Seminyak

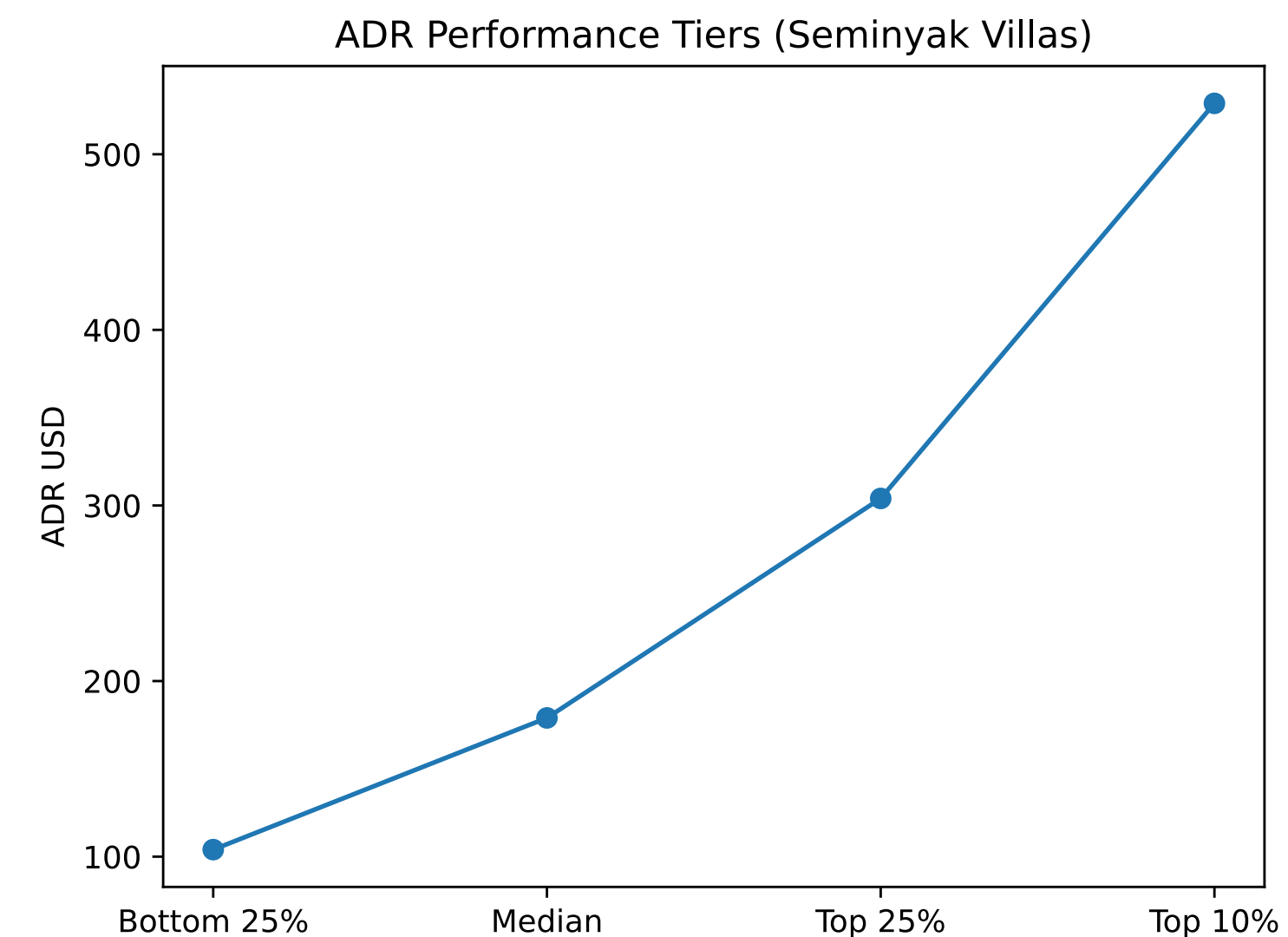
Bottom 25% ADR: ~\$104

Market Median ADR: ~\$179

Top 25% ADR: ~\$304+

Top 10% ADR: ~\$529+

Wellness-equipped villas are consistently positioned in the Top 25% and Top 10% performance tiers.



Source: AirROI Performance Tiers, Seminyak.

Hotels (example)

Wellness vs No Wellness



Wellness - Courtyard by Marriott Bali Seminyak

[link](#)

ADR: ~\$160–\$220

OCC: 68–75%



The Haven Bali Seminyak - without Wellness

[link](#)

ADR: ~\$100–\$150

OCC: 58–65%

Wellness adds ADR premium and +5–10 p.p. occupancy within the same hotel segment and location.

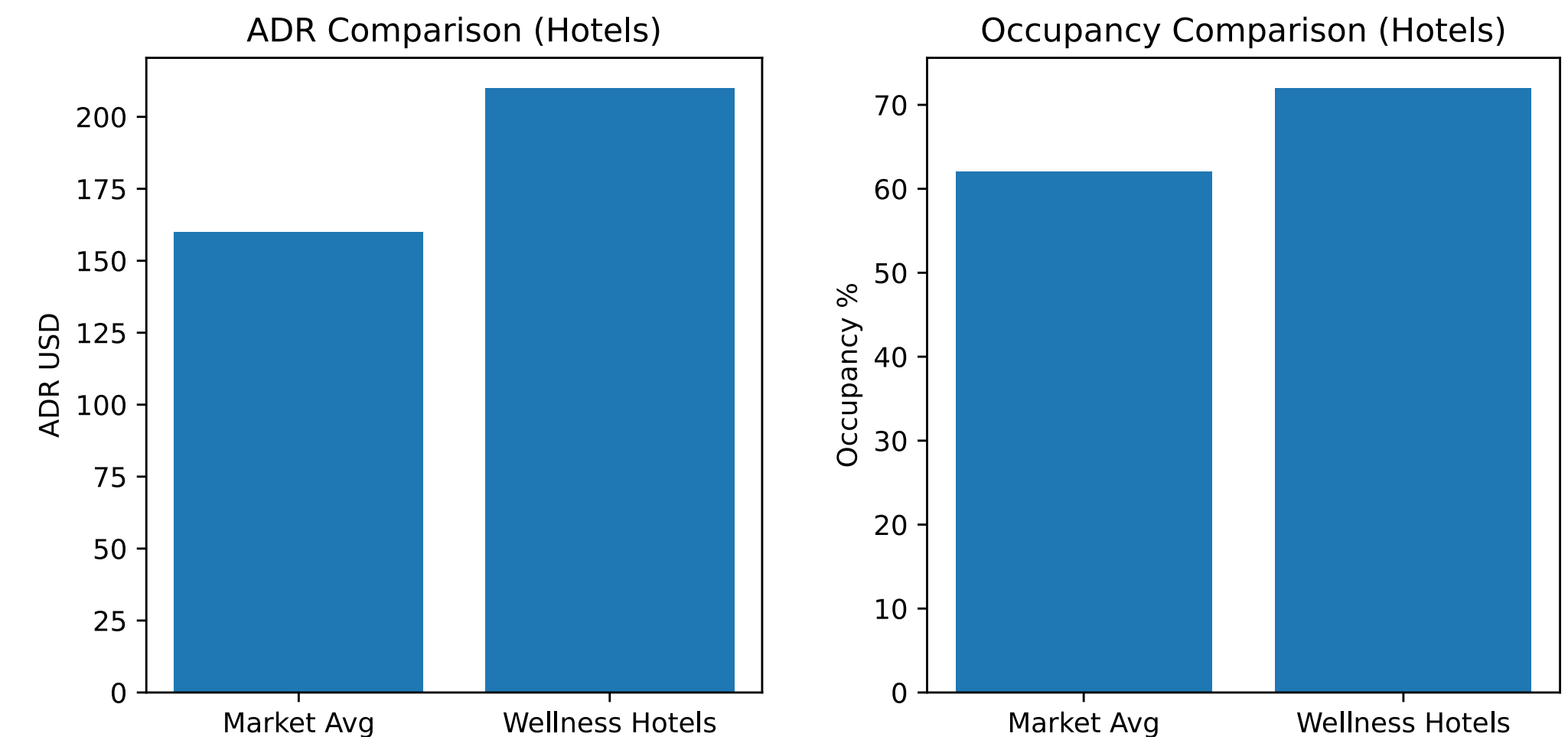
Market Average vs Wellness Hotels

Seminyak / Berawa • Leisure Hotels

Average ADR: ~\$160

Average OCC: ~62%

Wellness hotels outperform the market average both in price per night and occupancy due to differentiation and premium positioning.



Source: Aggregated hotel market benchmarks (STR, Booking.com)

ADR Performance

Hotels · Same location / same class

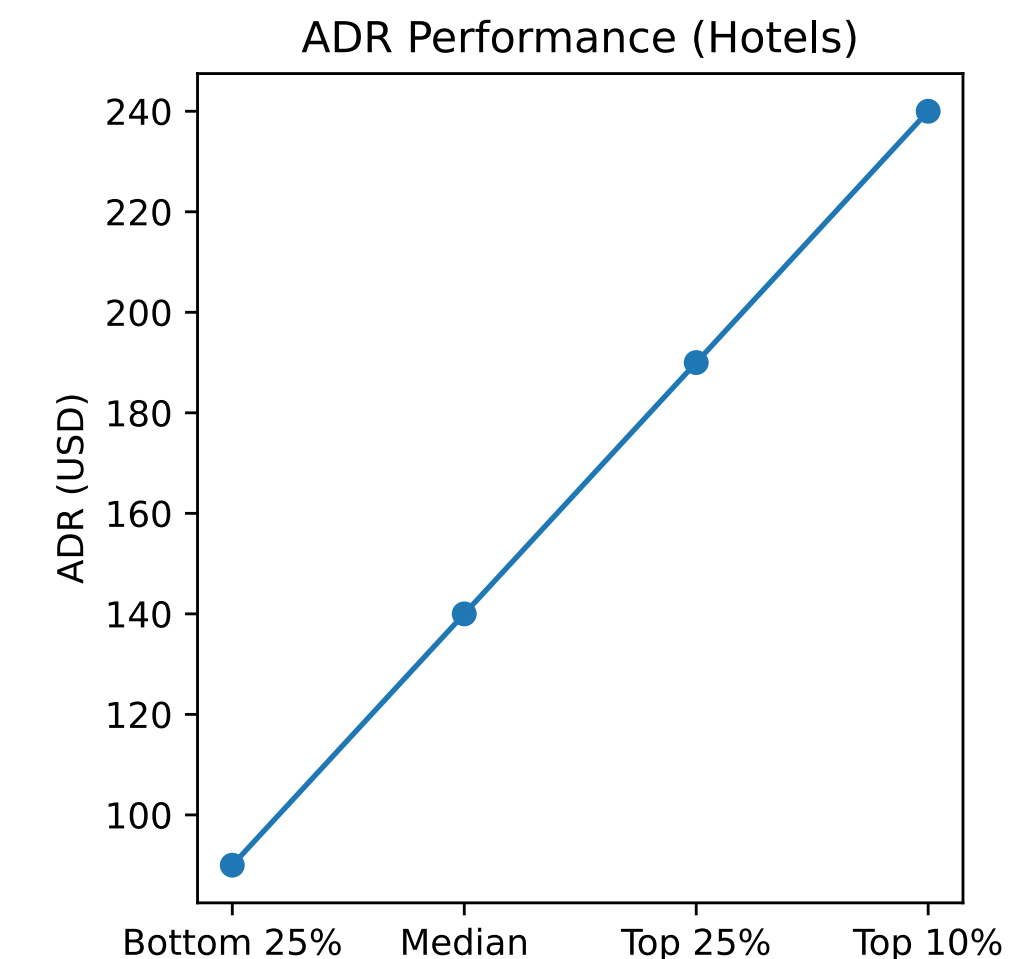
Bottom 25% ADR: ~\$90

Market Median ADR: ~\$140

Top 25% ADR: ~\$190

Top 10% ADR: ~\$240+

Conclusion: Wellness hotels are consistently positioned in the Top 25% and Top 10% ADR tiers, indicating a structural pricing advantage within the same market.



Villas: Wellness vs No Wellness (Sanur)



Wellness - Kayumanis Sanur Private Villa & Spa

[link](#)

Unit type used: 2-3 Bedroom Private Villa

ADR: ~\$260

OCC (market benchmark): ~60%



Astana Made Villas Sanur - without Wellness

[link](#)

ADR: ~\$160

OCC (market benchmark): ~45%

Wellness infrastructure delivers ~62% ADR premium and operates with about +15 p.p. higher occupancy WITHIN THE SAME 2-4BR villa segment in Sanur.

Market Average vs Wellness Villas

Sanur, 2–4 BR

Market Average

ADR: ~\$160

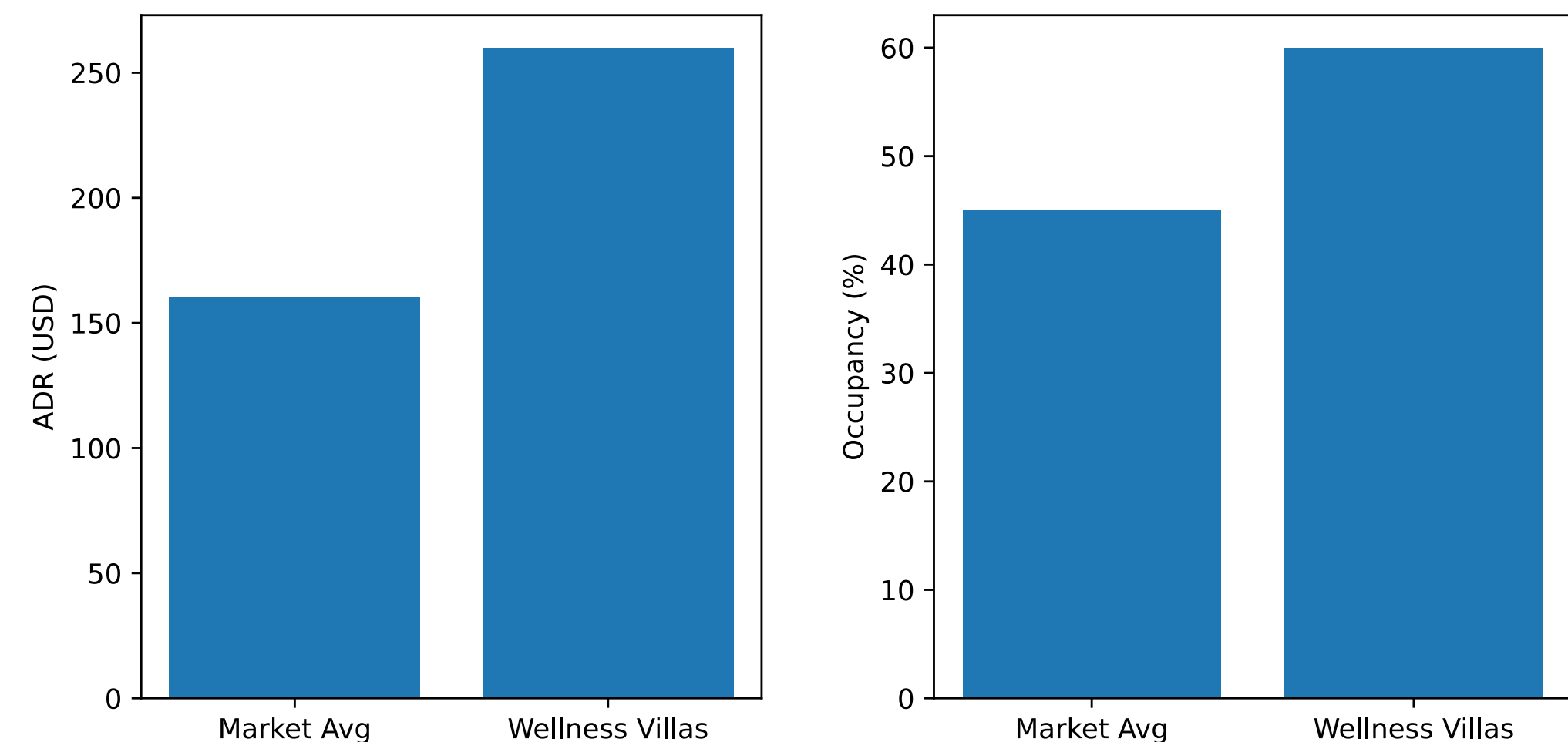
Occupancy: ~45%

Wellness Villas

ADR: ~\$260

Occupancy: ~60%

Conclusion: Wellness villas materially outperform the market average in both ADR and occupancy due to premium positioning and experiential demand.



Source: Public villa rates (Booking, Kayak); occupancy — market benchmarks (AirDNA / industry summaries)

ADR Performance

Villas, Sanur, 2–4 BR

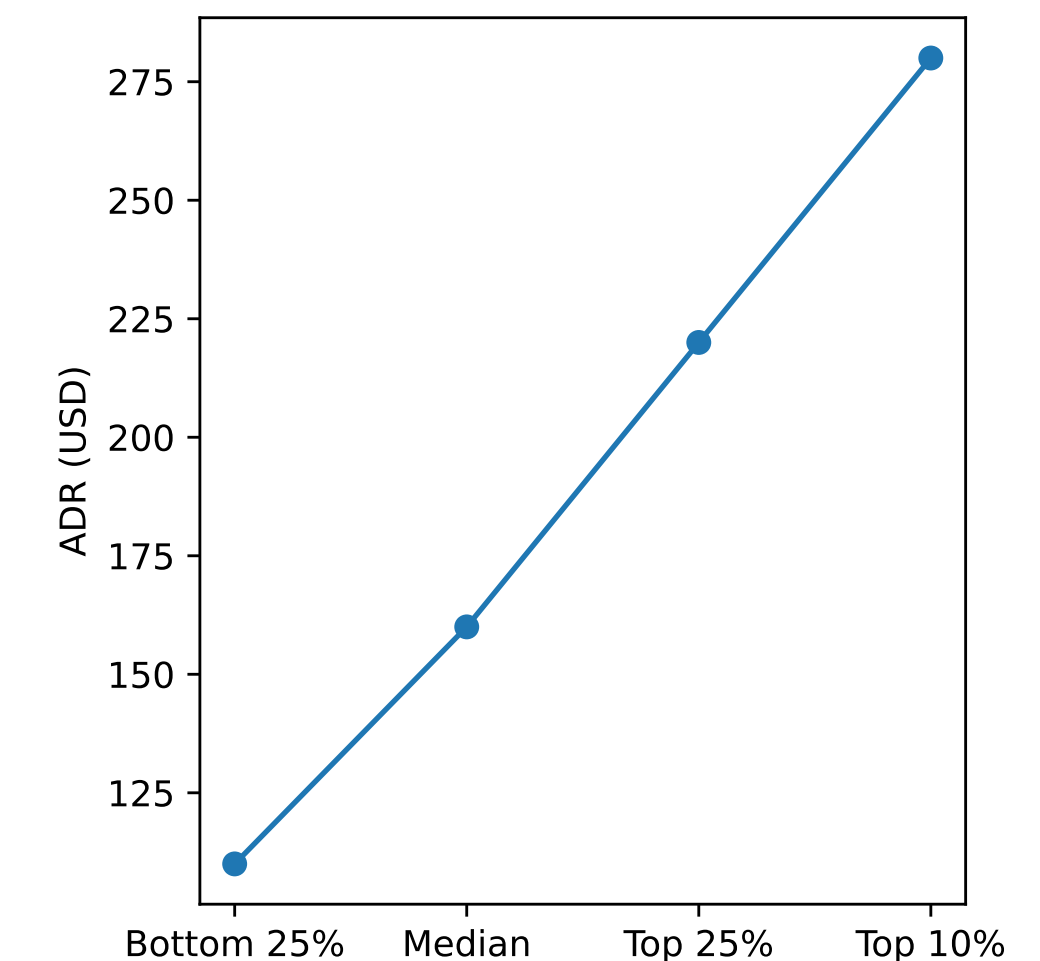
Bottom 25%: ~\$110

Market Median: ~\$160

Top 25%: ~\$220

Top 10%: ~\$280+

Conclusion: Wellness villas are consistently positioned in the Top 25%–Top 10% ADR tiers, confirming a structural pricing advantage, not a one-off effect.



Hotels: Wellness vs Non-Wellness (Sanur)

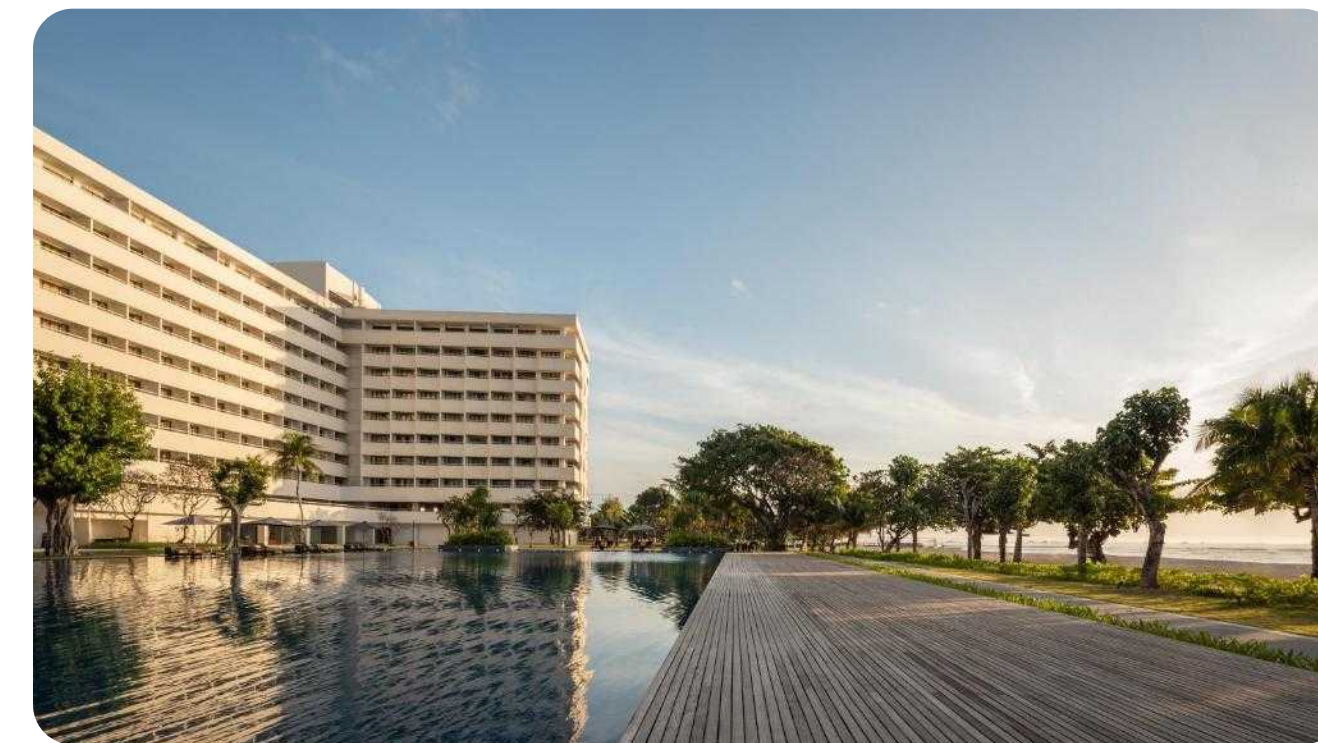


Maya Sanur Resort & Spa - Wellness

[link](#)

ADR: ~\$195

OCC (market benchmark): ~72%



Bali Beach Hotel - without Wellness

[link](#)

ADR: ~\$120

OCC (market benchmark): ~62%

Wellness hotels in Sanur achieve ~60% higher ADR and operate with ~+10 p.p. higher occupancy compared to non-wellness hotels in the same location.

Market Average vs Wellness Hotels

Sanur

Market Average (Leisure Hotels, Sanur)

ADR: ~\$120

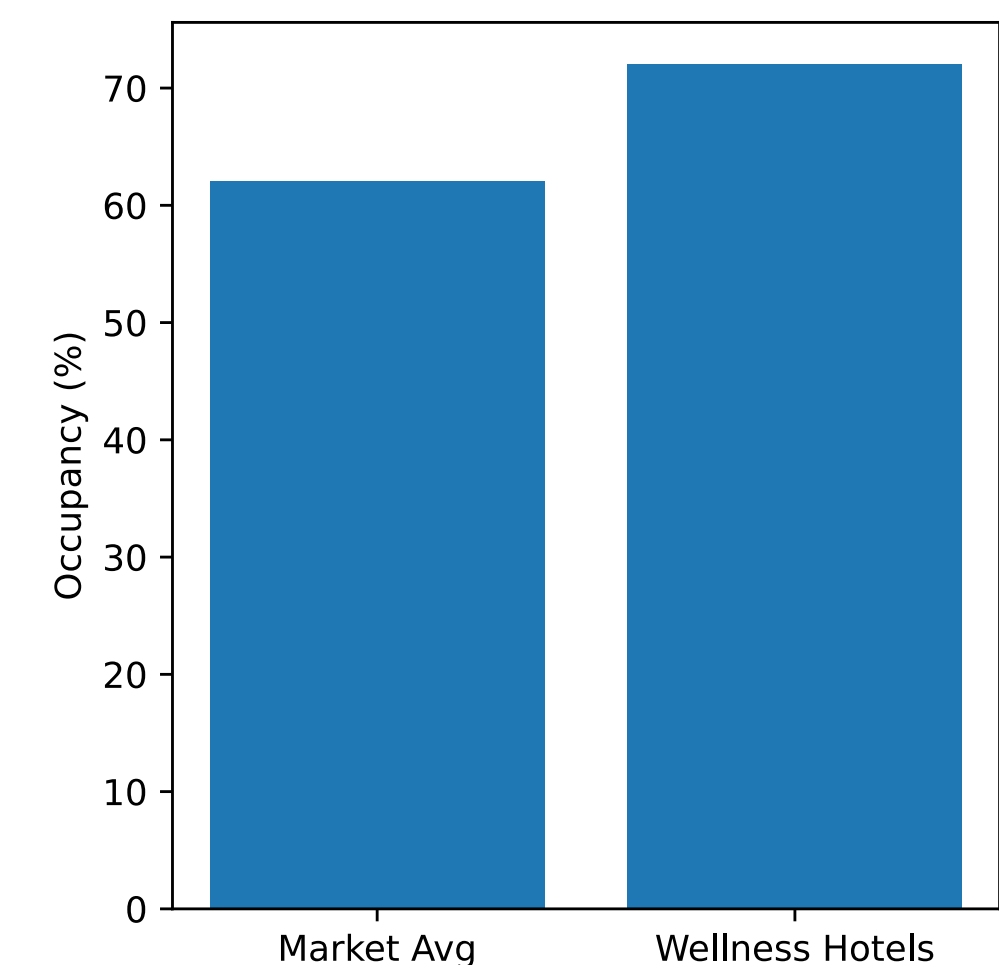
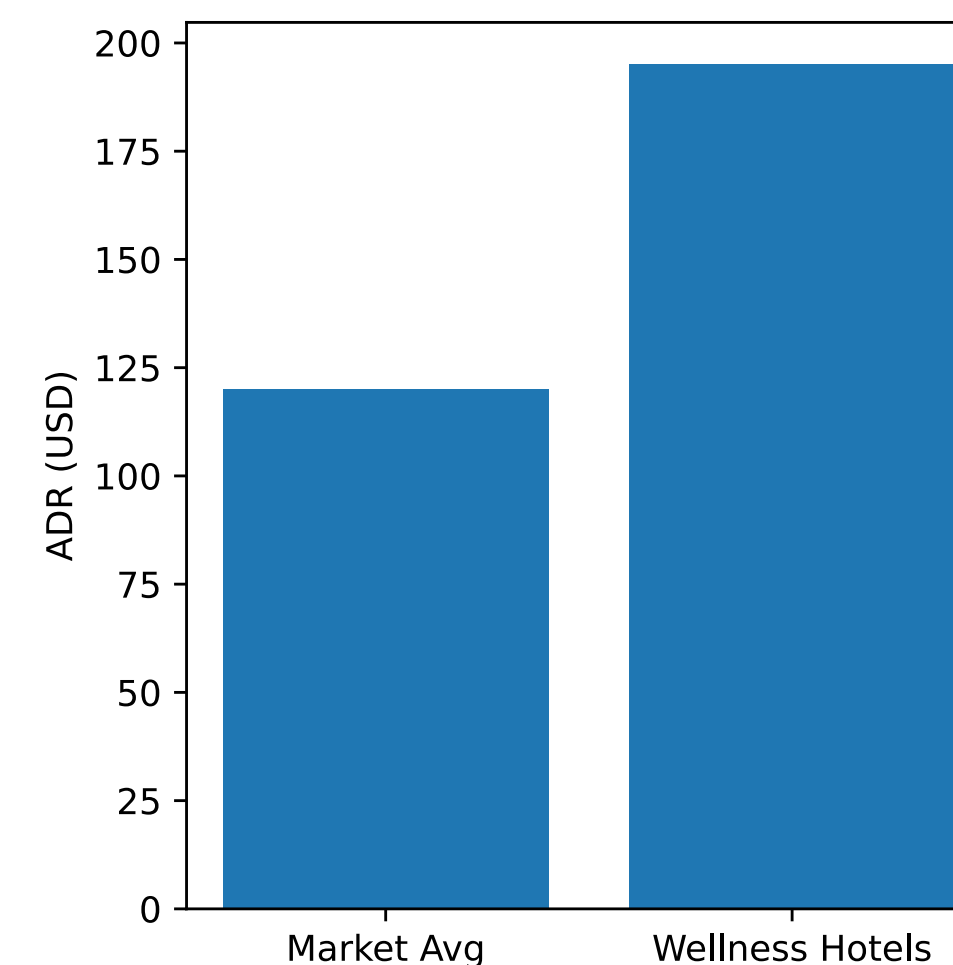
Occupancy: ~62%

Wellness Hotels

ADR: ~\$195

Occupancy: ~72%

Conclusion: Wellness hotels consistently outperform the market average in both ADR and occupancy, driven by experiential demand and longer average stays.



ADR Performance

Hotels, Sanur

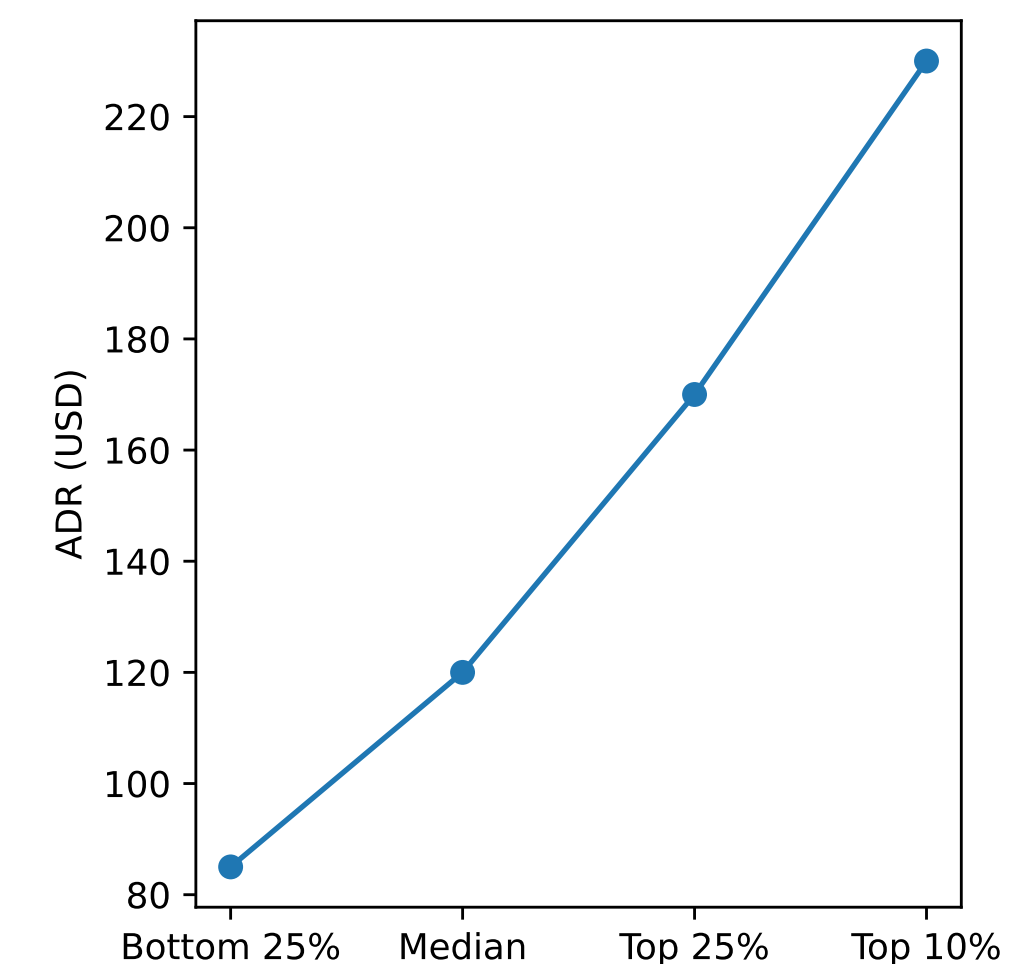
Bottom 25%: ~\$85

Market Median: ~\$120

Top 25%: ~\$170

Top 10%: ~\$230+

Conclusion: Wellness hotels are positioned in the Top 25%–Top 10% ADR tiers, confirming a structural pricing premium rather than isolated cases.



Villas: Wellness vs No Wellness (Ubud)

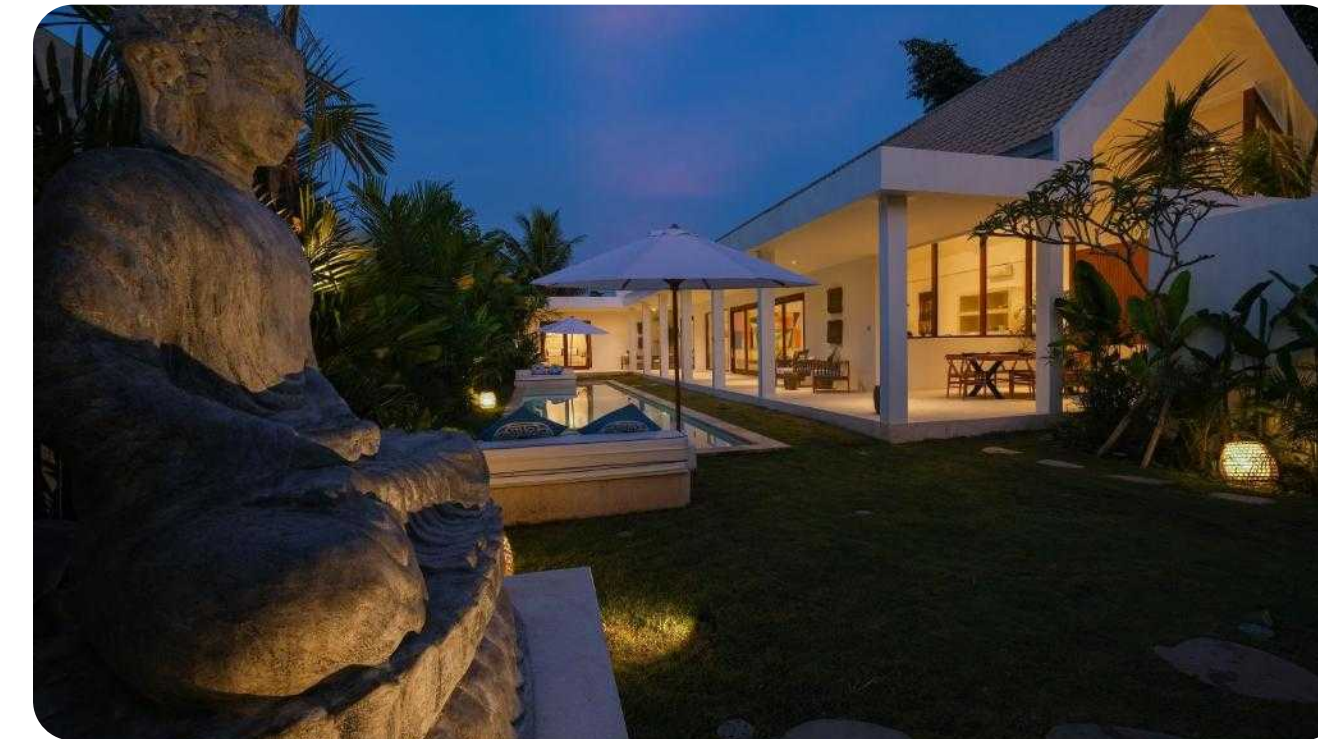


Villa Palem - Wellness

[link](#)

ADR: ~\$300 per night

OCC (market benchmark): ~65%



Ubud Luxury 2-Bedroom Villa with Private Pool and BBQ - without Wellness [link](#)

ADR: ~\$180 per night

OCC (market benchmark): ~50%

Wellness infrastructure delivers ~67% ADR premium and operates with ~+15 p.p. higher occupancy within the same 2-4BR villa segment in Ubud.

Market Average vs Wellness Villas

Ubud, 2–4 BR

Market Average

ADR: ~\$180

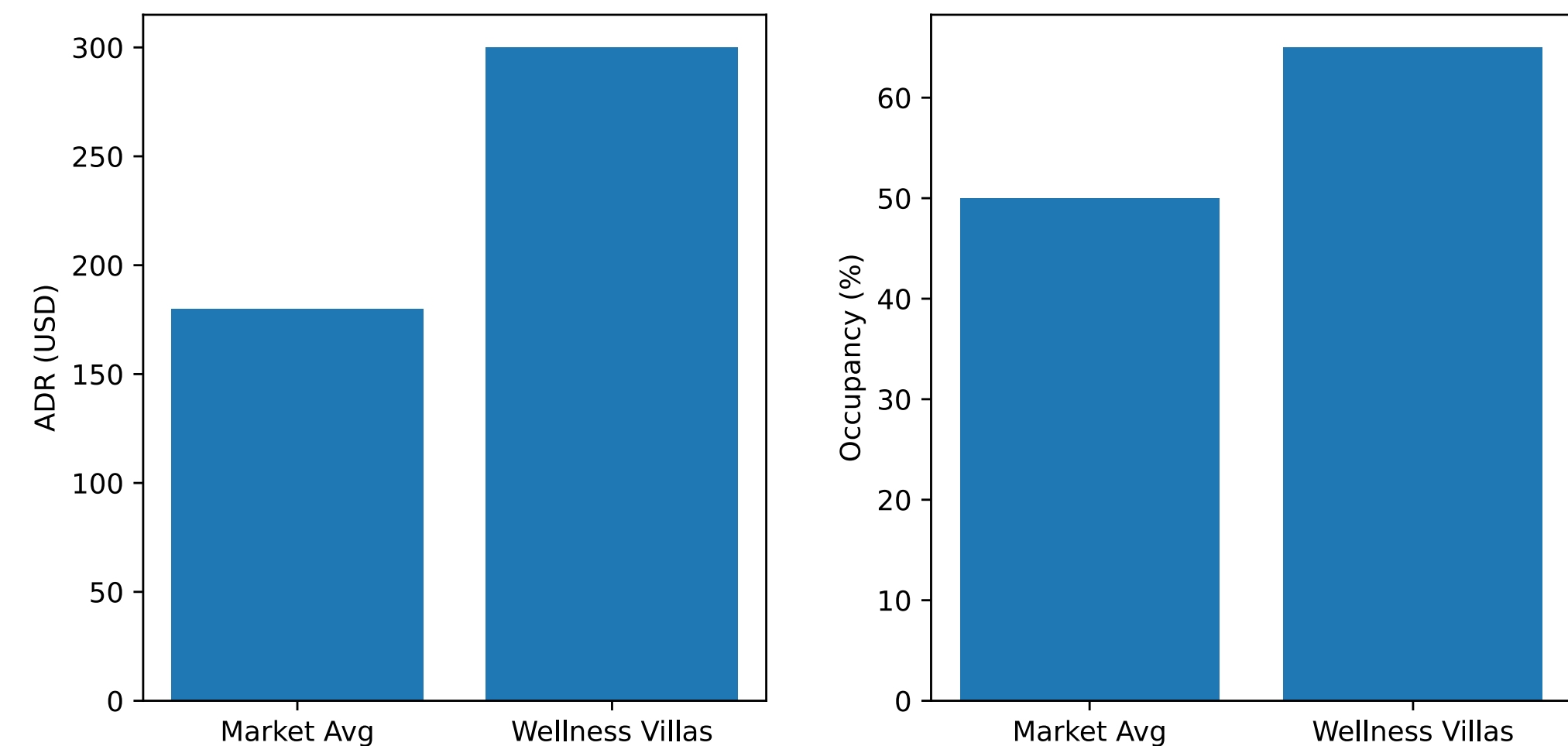
Occupancy: ~50%

Wellness Villas

ADR: ~\$300

Occupancy: ~65%

Conclusion: Wellness villas significantly outperform the market average in both price per night and occupancy, driven by experiential demand and destination-driven stays in Ubud.



Source: Public villa rates (Booking, Airbnb); occupancy — market benchmarks (AirDNA / industry summaries)

ADR Performance

Villas, Ubud, 2–4 BR

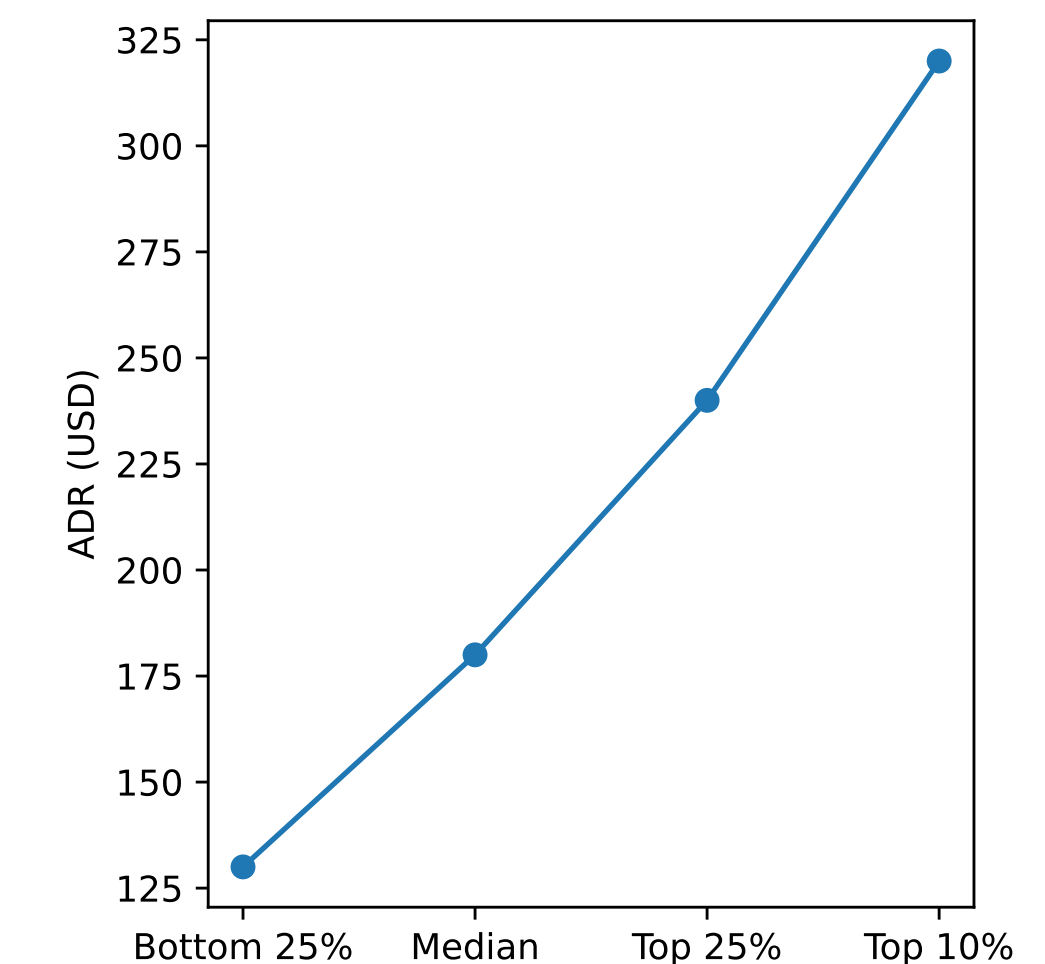
Bottom 25%: ~\$130

Market Median: ~\$180

Top 25%: ~\$240

Top 10%: ~\$320+

Conclusion: Wellness villas are consistently positioned in the Top 25%–Top 10% ADR tiers, confirming a structural pricing advantage in Ubud’s villa market.



Hotels: Wellness vs No Wellness (Ubud)



Lumeria Yoga - Wellness

[link](#)

ADR: ~\$210

OCC (market benchmark): ~72%



Meruhdani Boutique Hotel Ubud -
without Wellness [link](#)

ADR: ~\$120

OCC (market benchmark): ~60%

Wellness hotels in Ubud achieve ~75% higher ADR and operate with ~+12 p.p.
higher occupancy compared to non-wellness hotels in the same location.

Market Average vs Wellness Hotels

Ubud

Market Average (Leisure Hotels, Ubud)

ADR: ~\$120

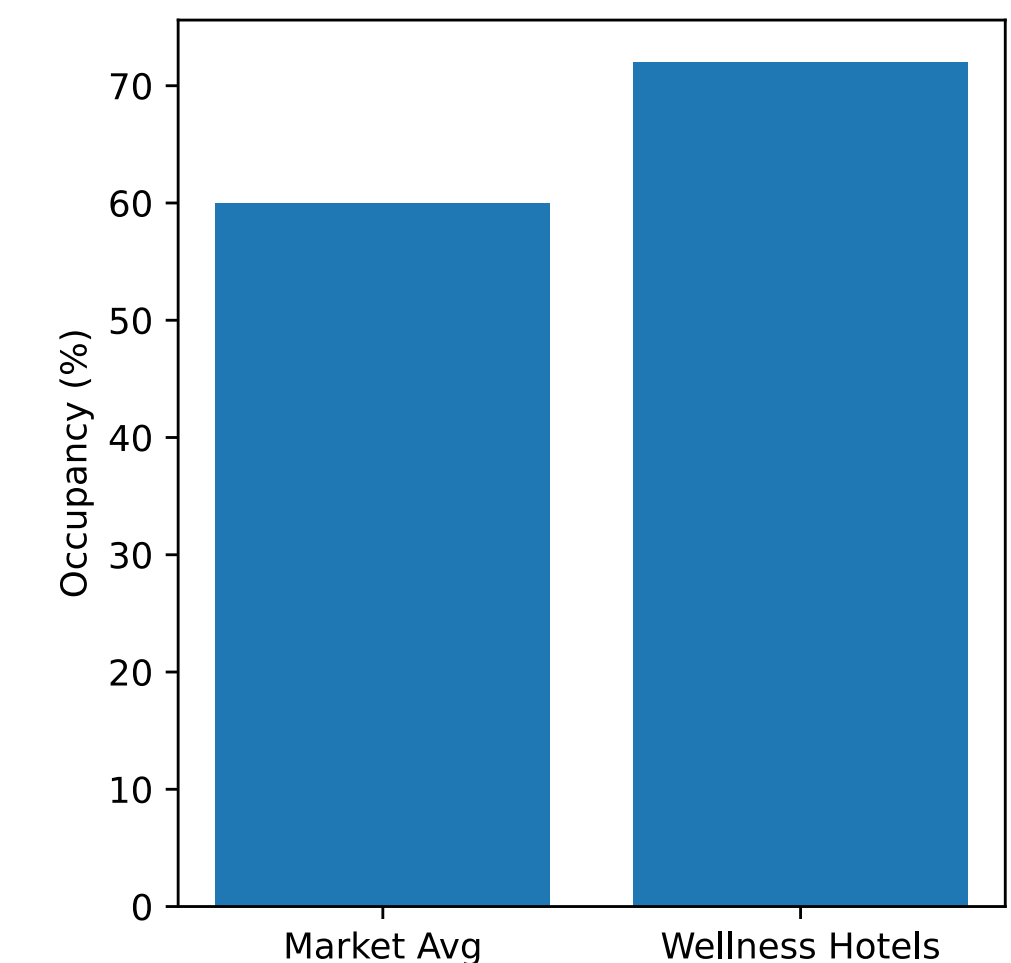
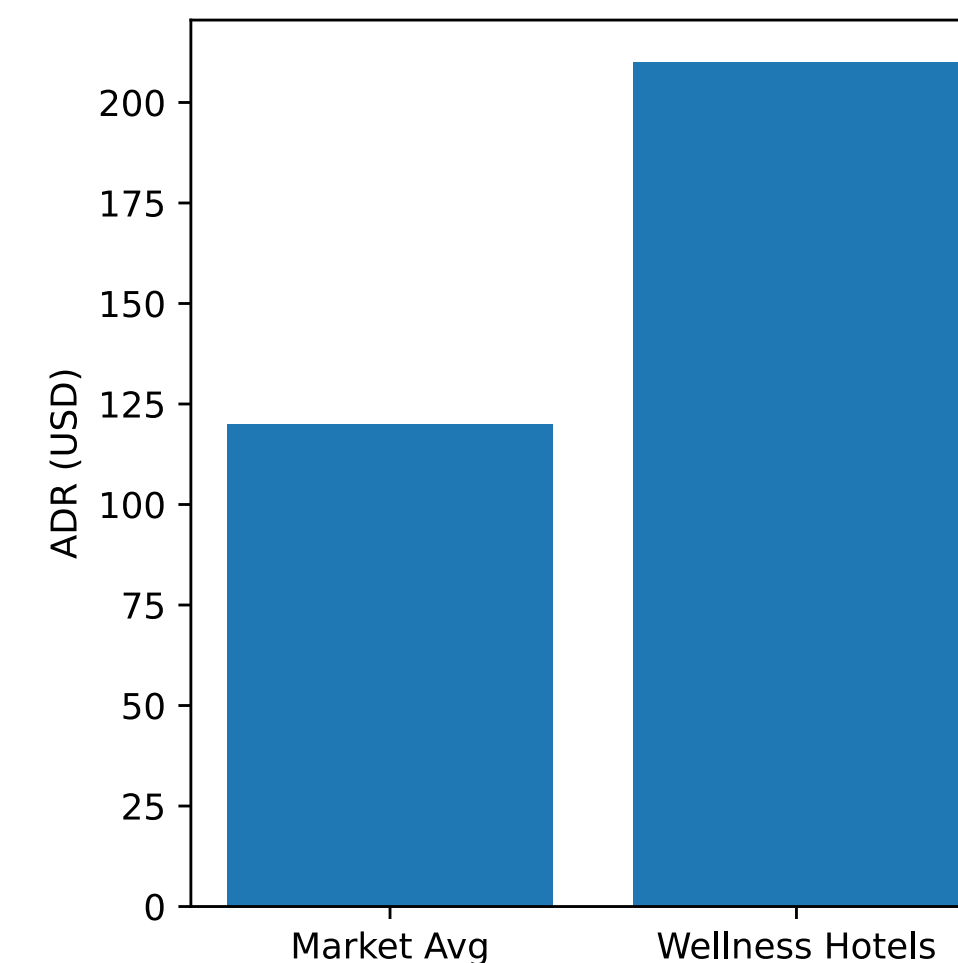
Occupancy: ~60%

Wellness Hotels

ADR: ~\$210

Occupancy: ~72%

Conclusion: Wellness hotels significantly outperform the market average in both ADR and occupancy, driven by destination-led wellness demand in Ubud.



ADR Performance

Hotels, Ubud

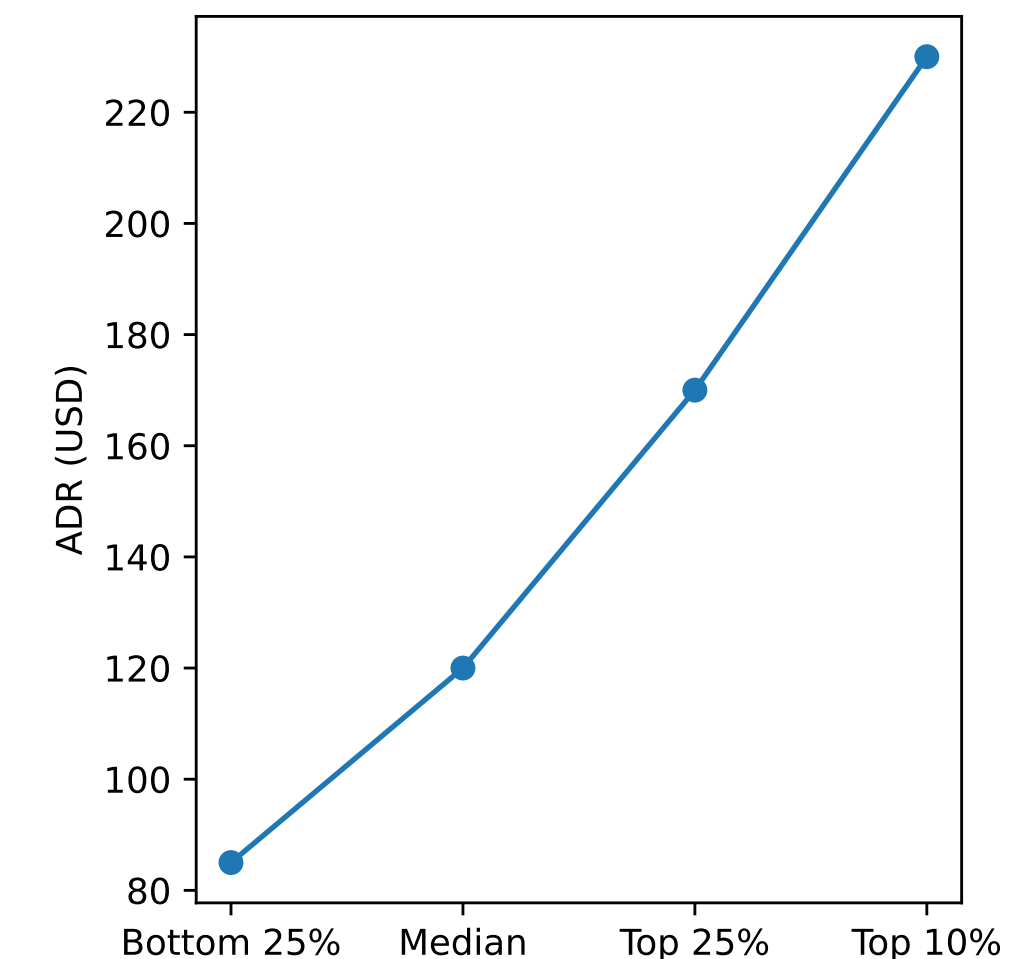
Bottom 25%: ~\$85

Market Median: ~\$120

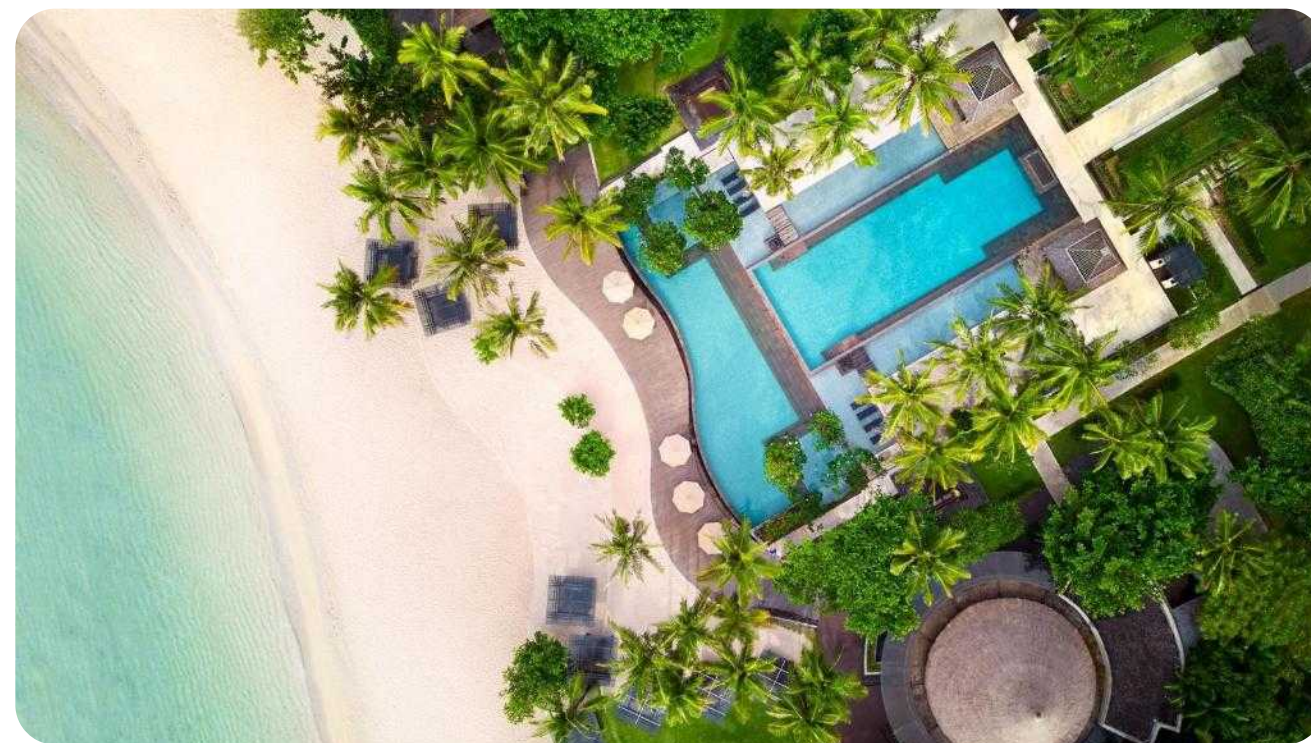
Top 25%: ~\$170

Top 10%: ~\$230+

Conclusion: Wellness hotels are consistently positioned in the Top 25%–Top 10% ADR tiers, confirming a structural pricing premium within Ubud's hotel market.



Hotels: Wellness vs No Wellness (Nusa Dua)



The Ritz-Carlton Bali - Wellness

[link](#)

ADR: ~\$260

OCC (market benchmark): ~75%



Ibis Styles Bali Benoa - without

Wellness [link](#)

ADR: ~\$160

OCC (market benchmark): ~65%

Wellness hotels in Nusa Dua achieve ~60% higher ADR and operate with ~+10 p.p. higher occupancy compared to non-wellness hotels in the same destination.

Market Average vs Wellness Hotels

Nusa Dua

Market Average (Leisure Hotels, Nusa Dua)

ADR: ~\$160

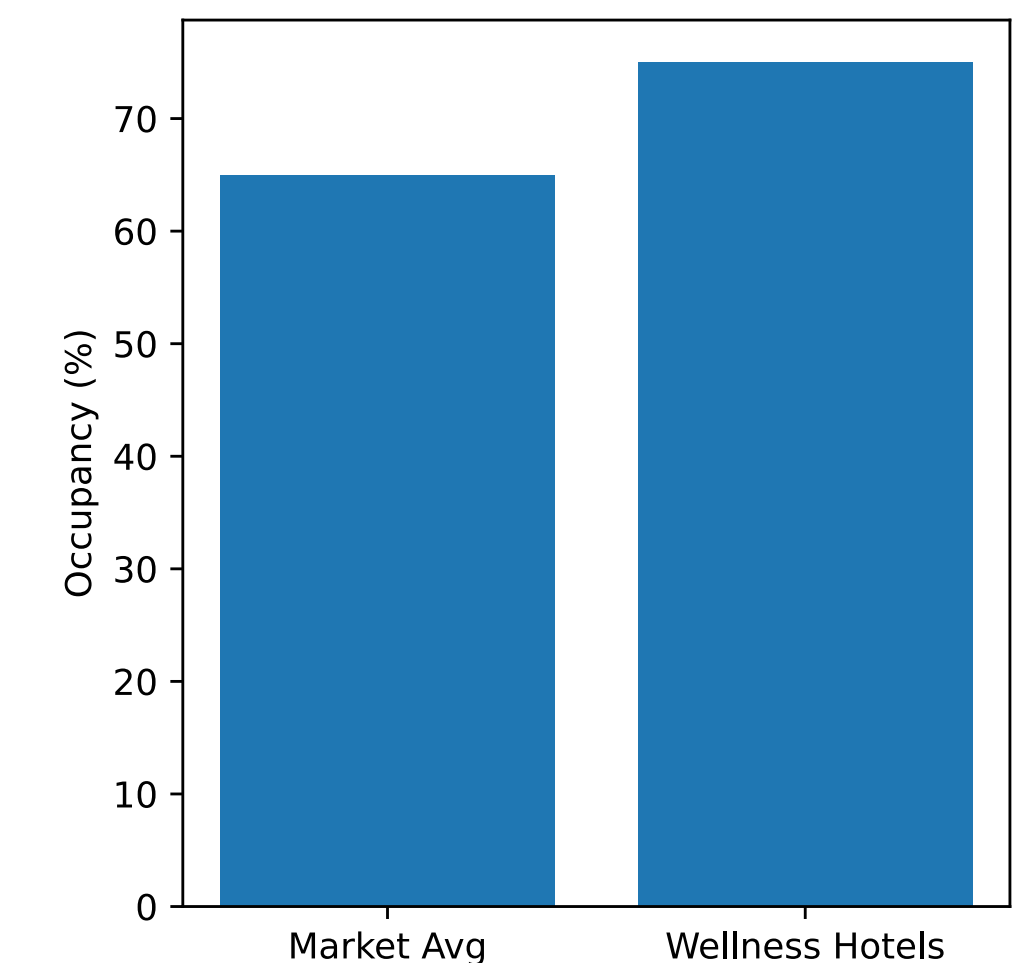
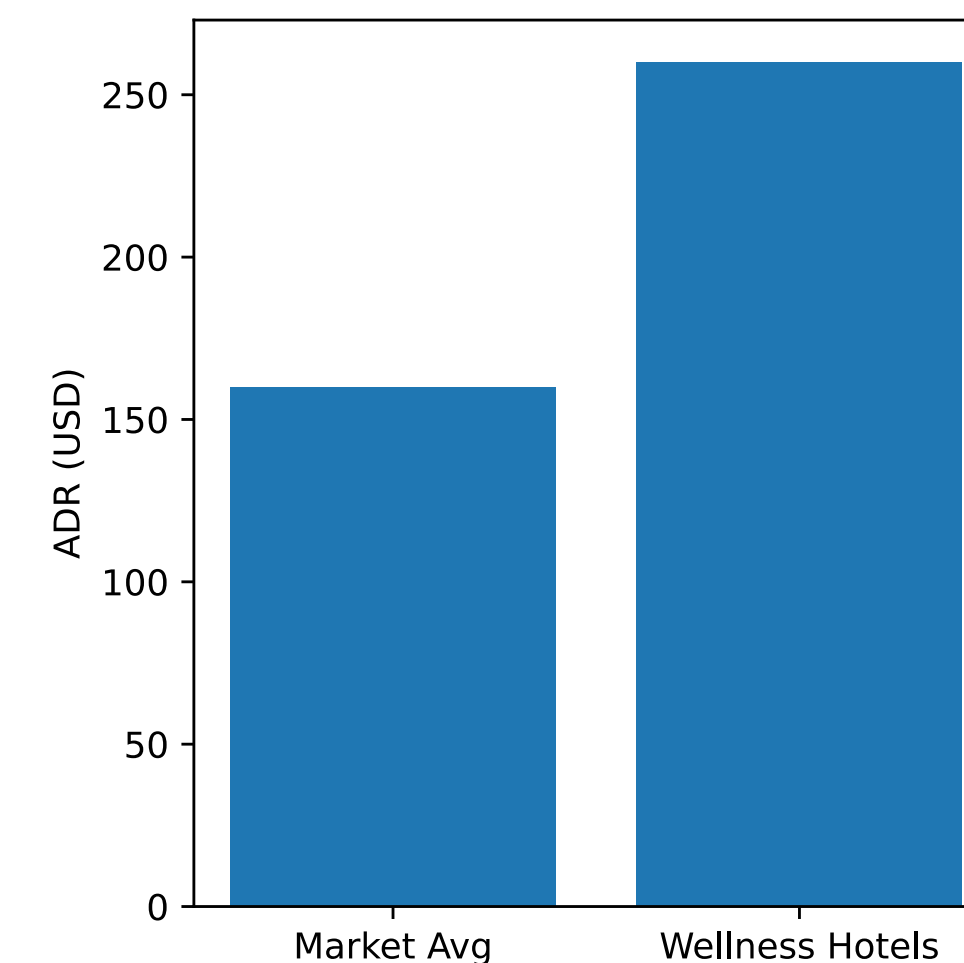
Occupancy: ~65%

Wellness Hotels

ADR: ~\$260

Occupancy: ~75%

Conclusion: Wellness-oriented resorts significantly outperform the market average in both ADR and occupancy, driven by destination-led luxury and experiential demand in Nusa Dua.



ADR Performance

Hotels, Nusa Dua

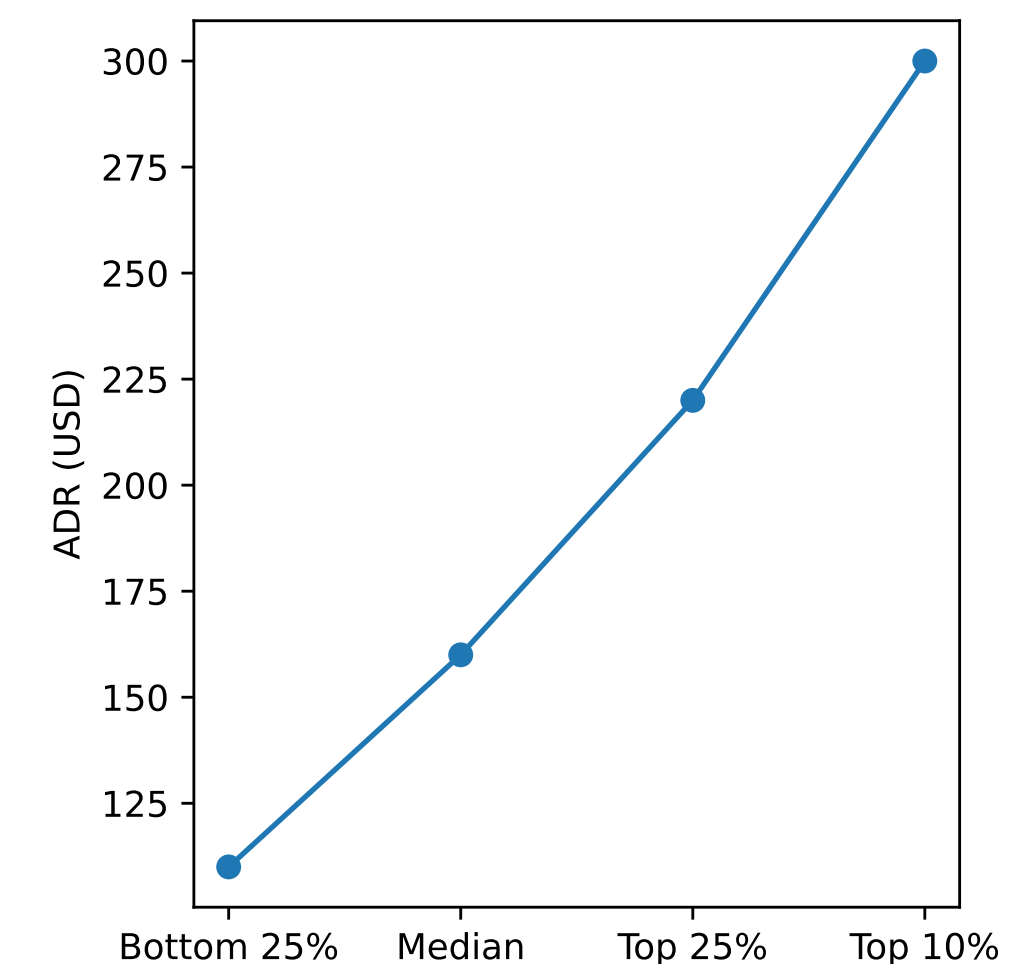
Bottom 25%: ~\$110

Market Median: ~\$160

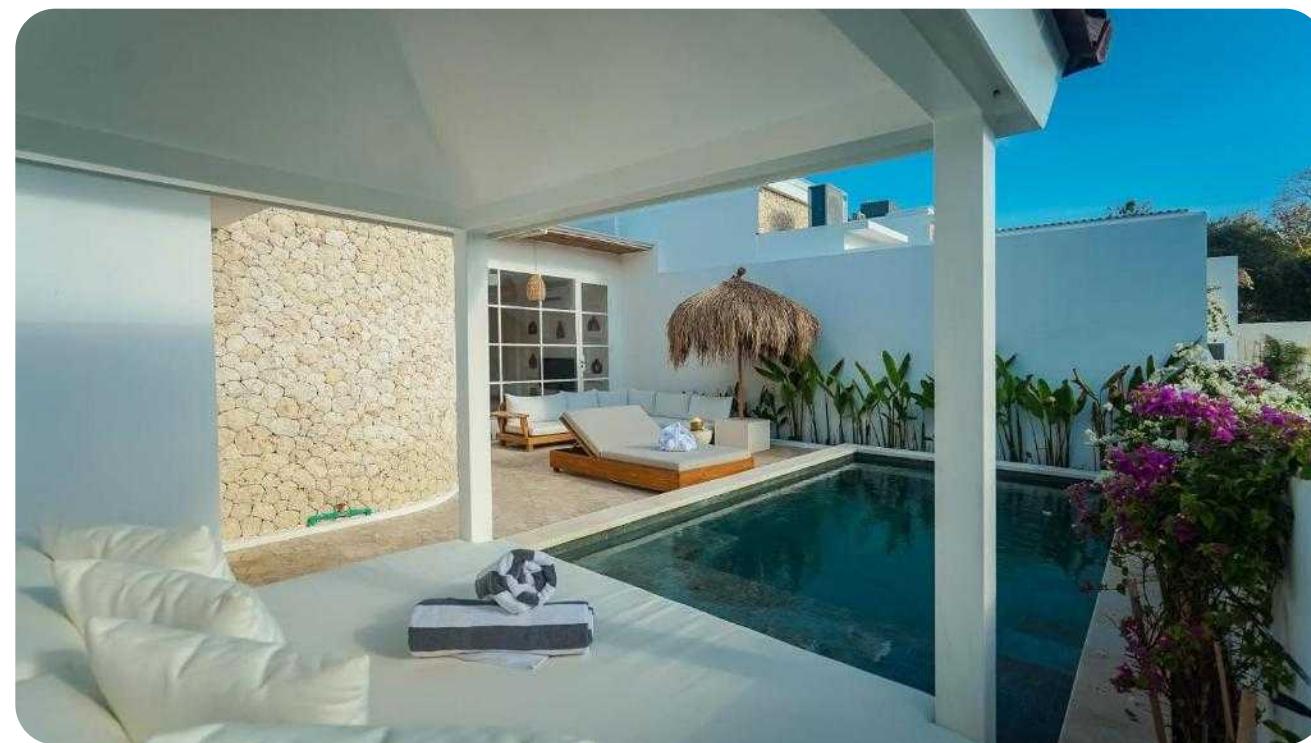
Top 25%: ~\$220

Top 10%: ~\$300+

Conclusion: Wellness resorts are consistently positioned in the Top 25%–Top 10% ADR tiers, confirming a structural pricing premium in Nusa Dua's hotel market.



Villas: Wellness vs No Wellness (Uluwatu)



3 Bedrooms Sanctuary Villa Uluwatu - Wellness

[link](#)

ADR: ~\$360

OCC (market benchmark): ~65%



Sanctuary Villa 5 Uluwatu Bali -
without Wellness [link](#)

ADR: ~\$220

OCC (market benchmark): ~50%

Wellness infrastructure delivers ~64% ADR premium and operates with ~+15 p.p.

higher occupancy within the same 2-4BR villa segment in Uluwatu.



Market Average vs Wellness Villas

Uluwatu, 2–4 BR

Market Average

ADR: ~\$220

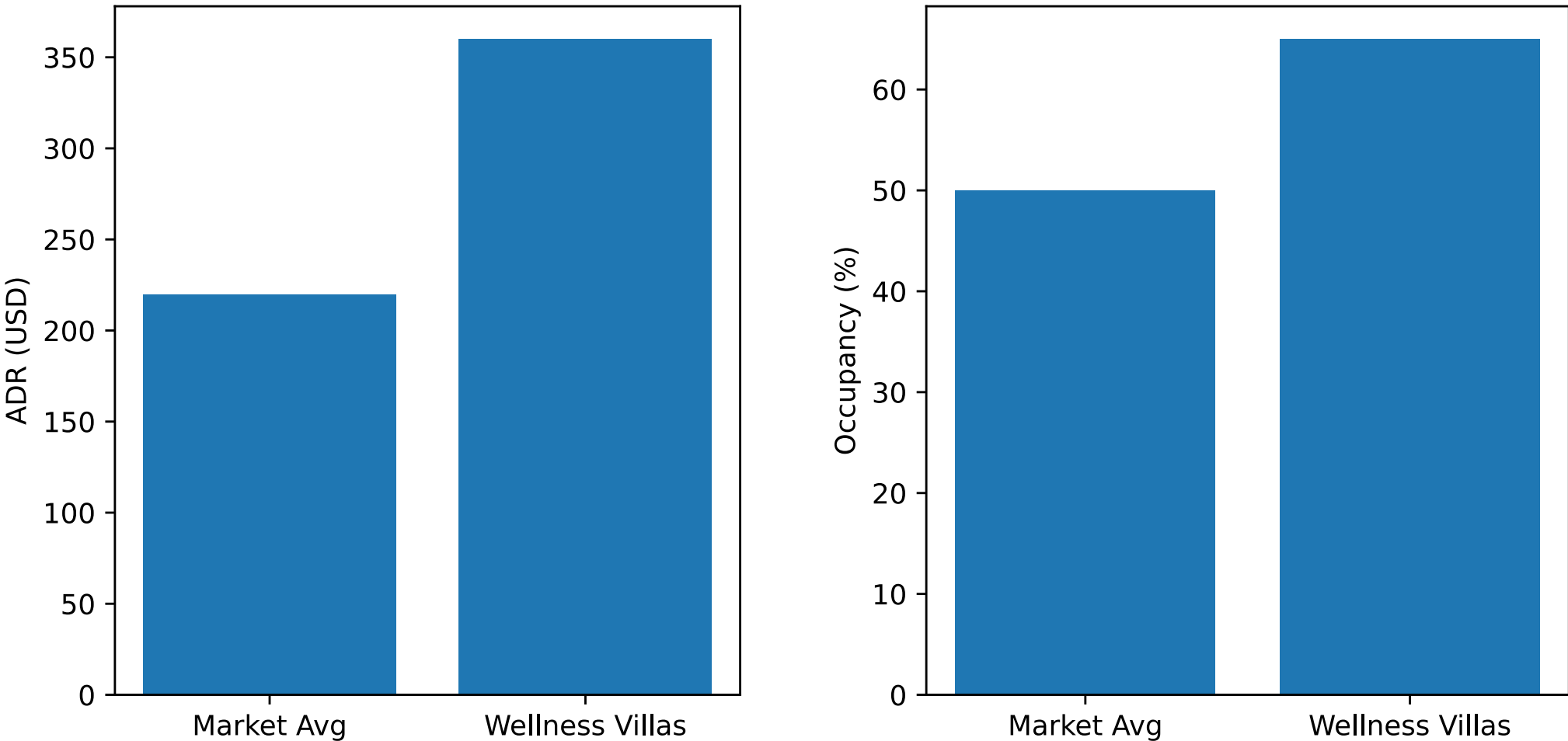
Occupancy: ~50%

Wellness Villas

ADR: ~\$360

Occupancy: ~65%

Conclusion: Wellness villas in Uluwatu significantly outperform the market average in both ADR and occupancy, driven by experiential luxury demand and destination-driven stays.



Source: Public villa rates (Booking.com); occupancy — market benchmarks (AirDNA, industry summaries)

ADR Performance

Villas, Uluwatu, 2–4 BR

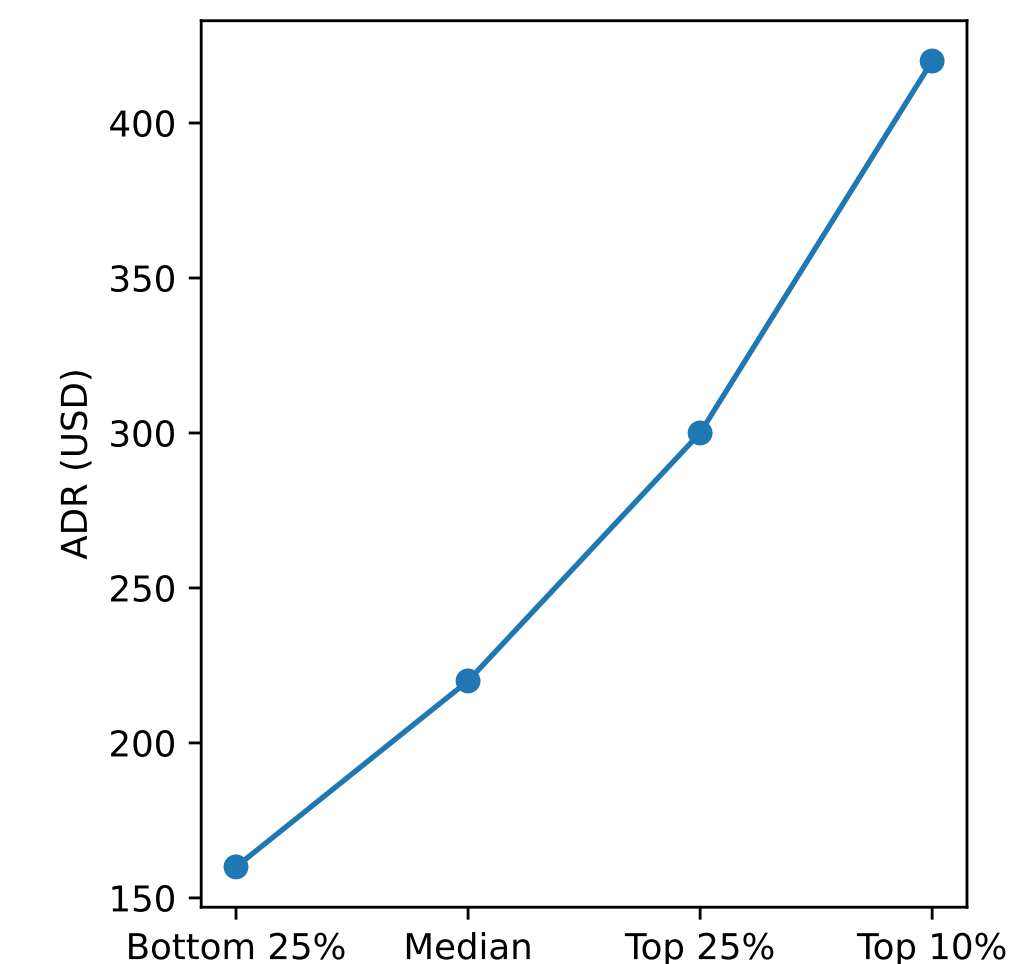
Bottom 25%: ~\$160

Market Median: ~\$220

Top 25%: ~\$300

Top 10%: ~\$420+

Conclusion: Wellness villas are consistently positioned in the Top 25%–Top 10% ADR tiers, confirming a structural pricing premium in the Uluwatu villa market.



Wellness Impact Across Locations

Coverage: Seminyak (5BR Villas & Hotels) · Sanur · Ubud · Bukit (Villas 2–4BR & Hotels)

Key insight: Wellness-enabled assets consistently outperform comparable non-wellness properties.

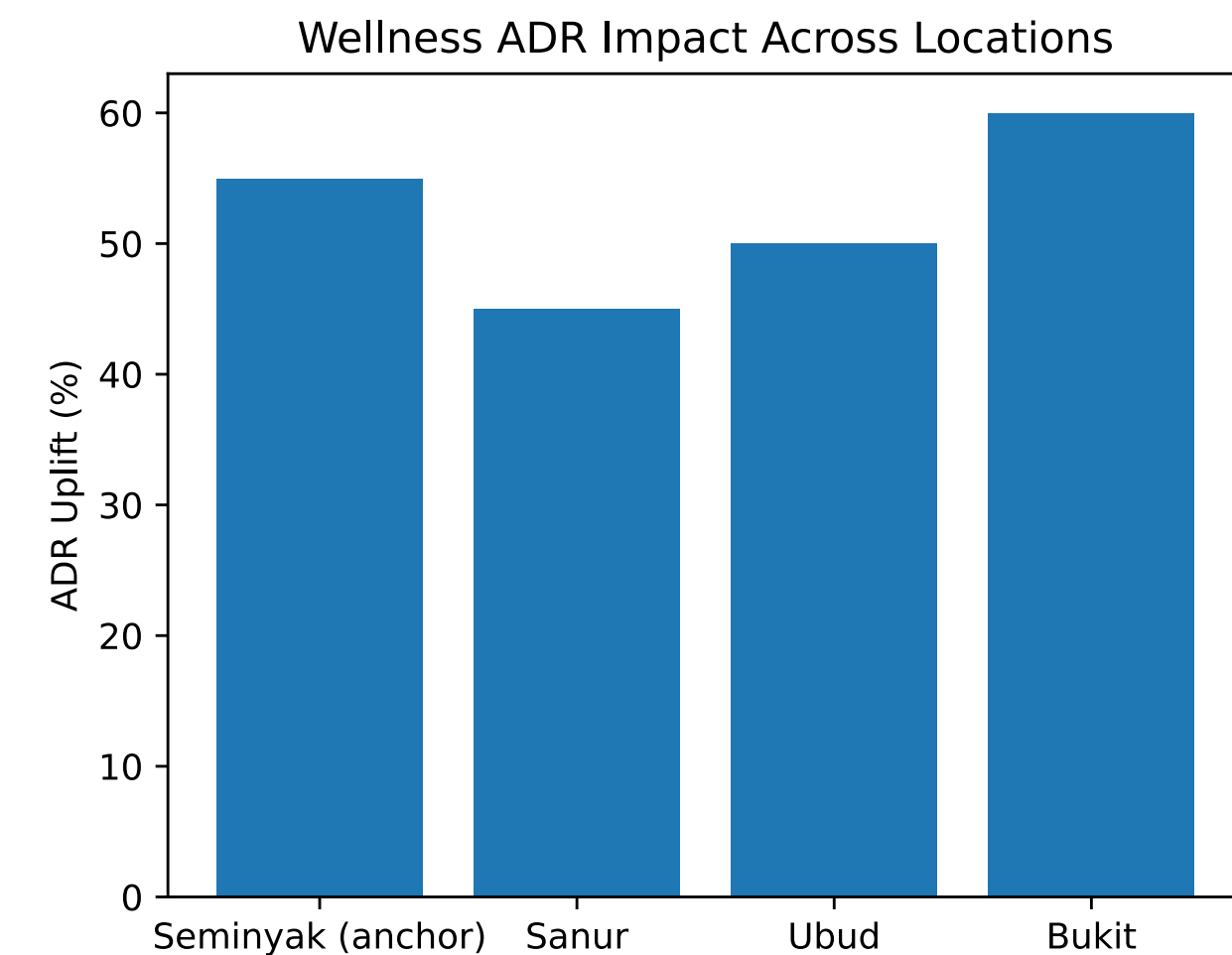
ADR uplift

Seminyak: +40–60%

Sanur: +35–55%

Ubud: +40–60%

Bukit: +45–70%



Source : Booking.com, Airbnb, STR, AirDNA

What Wellness Delivers

ADR premium: +30–70%

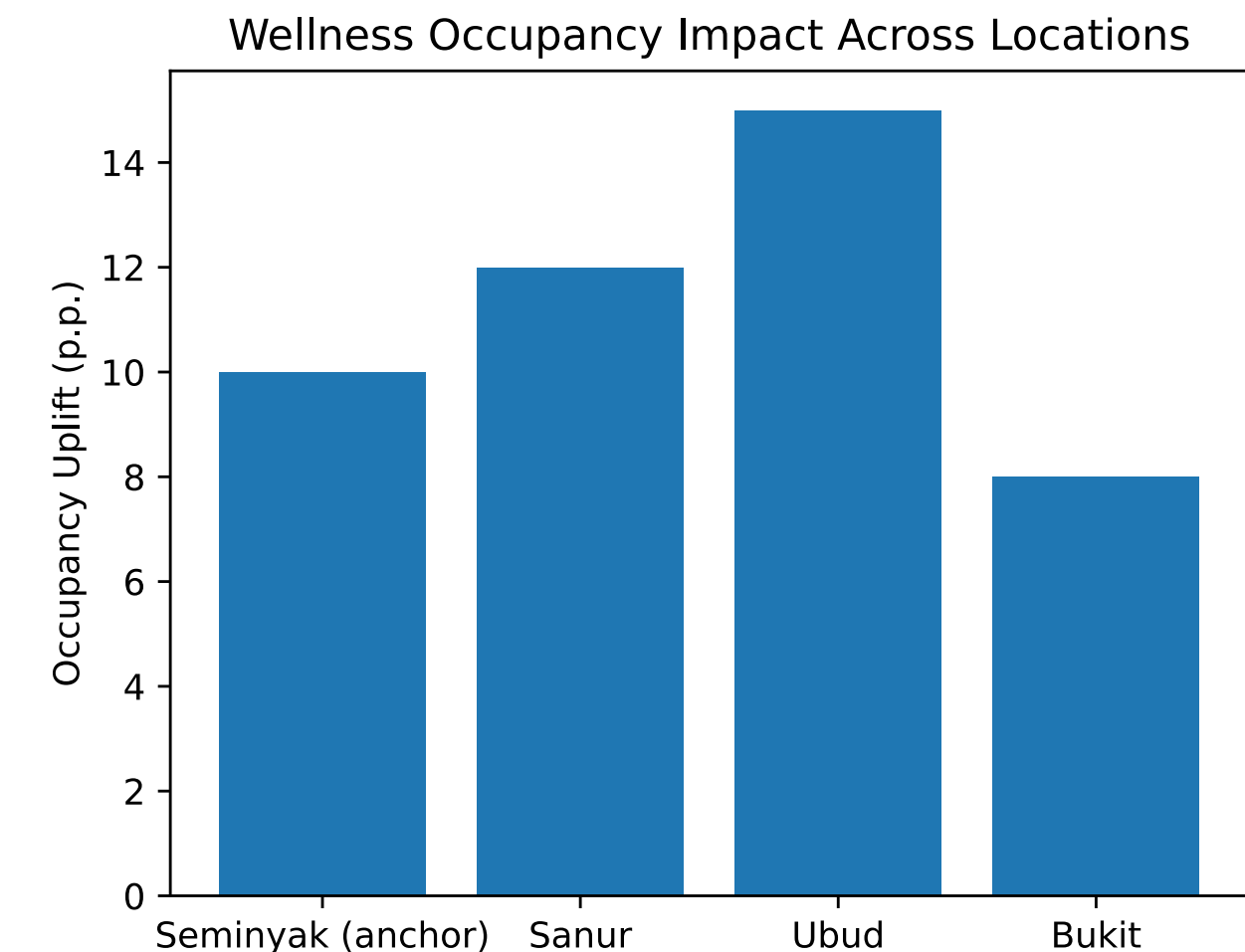
Occupancy uplift: +5–15 p.p.

Positioning: Top 25–10% ADR tiers

Why it works

- Higher willingness to pay
- Strong differentiation
- More stable demand

Conclusion: Wellness = structural revenue driver, not a feature.



**Wellness isn't an operating expense.
It's a sales accelerator, margin protector,
and a powerful differentiation tool.**