



PERSONAL CARE & BEAUTY

The Global Wellness Economy: Looking Beyond COVID

DECEMBER 2021



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**GLOBAL WELLNESS
INSTITUTE™**
EMPOWERING WELLNESS WORLDWIDE

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ABOUT THE AUTHORS

ABOUT THE GLOBAL WELLNESS INSTITUTE

The Global Wellness Institute (GWI), a 501(c)(3) non-profit organization, is considered the leading global research and educational resource for the global wellness industry and is known for introducing major industry initiatives and regional events that bring together leaders and visionaries to chart the future. GWI positively impacts global health and wellness by advocating for both public institutions and businesses that are working to help prevent disease, reduce stress, and enhance overall quality of life. Its mission is to empower wellness worldwide.

www.globalwellnessinstitute.org

ABOUT THE AUTHORS

The Global Wellness Economy: Looking Beyond COVID was prepared by Ophelia Yeung and Katherine Johnston, with major contributions from Tonia Callender. As Senior Research Fellows at the Global Wellness Institute, Ms. Yeung and Ms. Johnston bring decades of research and strategy experience in the public and private sectors to pioneer groundbreaking methodologies in measuring the size of the global wellness economy and its subsectors. Ms. Callender, Research Fellow, contributed research expertise in multiple wellness sectors. Katherine Ross, Rie Takemoto, and Stephan Ko provided assistance in data and literature research as Research Interns.

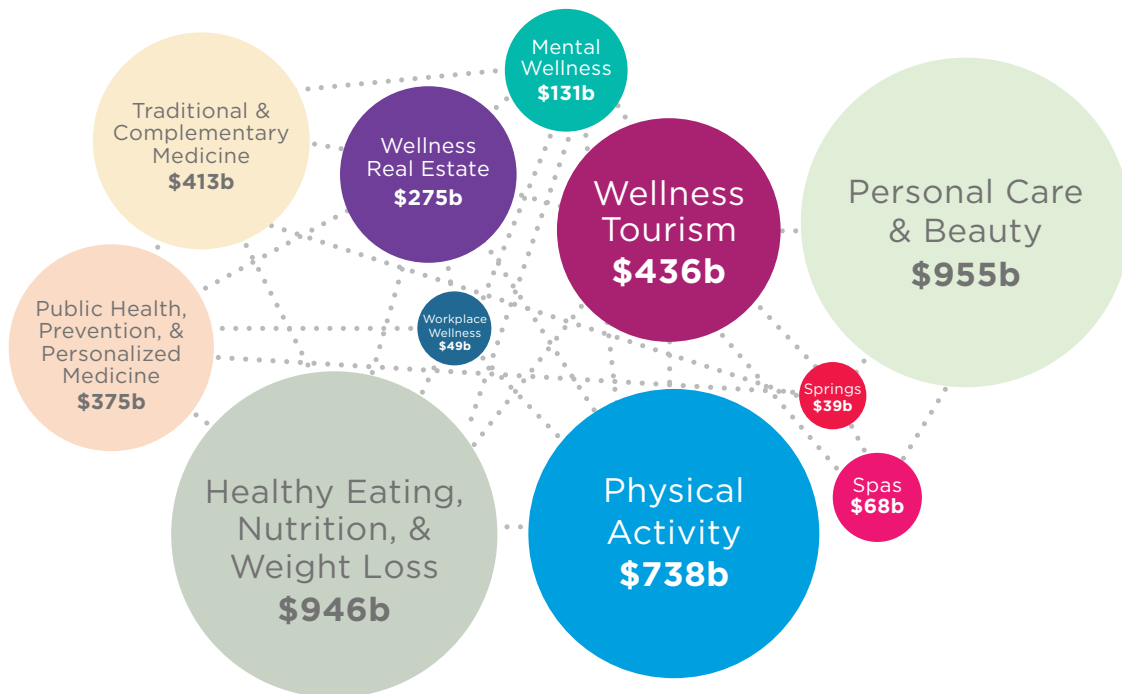
I. THE GLOBAL WELLNESS ECONOMY

The global wellness economy stands at \$4.4 trillion in 2020 amidst the chaos and disruptions caused by COVID-19.

The Global Wellness Institute (GWI) defines wellness as **the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health**. There are two important aspects to this definition. First, wellness is not a passive or static state, but rather an “active pursuit” that is associated with intentions, choices, and actions. Second, wellness is linked to holistic health – that is, it extends beyond physical health and incorporates many different dimensions, including physical, mental, emotional, spiritual, social, and environmental dimensions.

The wellness economy encompasses **industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives**. GWI last measured the size of the wellness economy in the 2018 *Global Wellness Economy Monitor*. In the last few years, major shifts and disruptions have taken place globally, with a period of strong growth (2017-2019), followed by the massive economic shock of the 2020 pandemic. An update for the global wellness economy is especially compelling and important now, because 2020 has become a watershed year that will forever divide history into “before” and “after” COVID-19.

GLOBAL WELLNESS ECONOMY: \$4.4 trillion in 2020



Note: Numbers do not add due to overlap in sectors.

Source: Global Wellness Institute

We estimate that the global wellness economy grew from \$4.3 trillion¹ in 2017 to \$4.9 trillion in 2019, or by 6.6% annually, a growth rate significantly higher than global economic growth (4.0%).² In 2020, the wellness economy fell by 11.0%, to \$4.4 trillion (while global GDP declined by 2.8%).

In this edition of the *Global Wellness Economy Monitor*, GWI is able to present, for the first time, a breakdown of the wellness economy in each region around the world. Asia-Pacific was the largest region for wellness spending in 2020, at \$1.5 trillion, followed by North America (\$1.3 trillion) and Europe (\$1.1 trillion). Together, these three regions account for 90% of the entire global wellness economy. Per capita spending on wellness is significantly higher in North America (\$3,567) and Europe (\$1,236) than in other regions of the world. It is important to keep in mind that some of the wellness sectors are “export industries” (i.e., selling services to people who are not residents of the country in which the business is located). For example, about 27% of all wellness tourism expenditures are from international travel; likewise, a significant portion of revenues in thermal/mineral springs and some types of spas come from international visitors. Therefore, not all of the wellness spending shown in the table below for each region is made by residents of that region.

Wellness Economy by Region, 2017, 2019, 2020

	Wellness Economy			Per Capita 2020	Average Annual Growth Rate	
	(US\$ billions)				2017-2019	2019-2020
	2017*	2019	2020			
Asia-Pacific	\$1,370.5	\$1,602.8	\$1,500.2	\$359.74	8.1%	-6.4%
North America	\$1,288.1	\$1,514.0	\$1,310.8	\$3,566.93	8.4%	-13.4%
Europe	\$1,168.3	\$1,288.6	\$1,141.5	\$1,235.83	5.0%	-11.4%
Latin America-Caribbean	\$311.7	\$302.1	\$235.4	\$360.31	-1.5%	-22.1%
Middle East-North Africa	\$104.7	\$120.9	\$107.7	\$214.53	7.4%	-10.9%
Sub-Saharan Africa	\$74.0	\$81.7	\$73.7	\$64.74	5.1%	-9.8%
WORLD	\$4,317.3	\$4,909.9	\$4,369.3	\$563.44	6.6%	-11.0%

* 2017 figures for this sector have been revised since GWI released the previous version of the *Wellness Economy Monitor* (see box below for more details).

Note: Figures may not sum to total due to rounding.

Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

¹ Note that the 2017 wellness economy figures have been revised and are slightly different from the figures presented in the 2018 *Wellness Economy Monitor*. See box below for more details.

² Global GDP data from: IMF, *World Economic Outlook Database*, October 2021 Edition, <https://www.imf.org/en/Publications/WEO/weo-database/2021/October>.

Asia-Pacific was one of the fastest-growing wellness markets from 2017-2019 (8.1% growth), and it also shrank the least during the pandemic (-6.4% from 2019-2020). Asia-Pacific's wellness economy was buffered during COVID-19 by its very high growth rates for *wellness real estate* and *public health, prevention, & personalized medicine*, and because it saw less decline in a few sectors, including *physical activity* and *personal care & beauty* (see individual sector chapters for more details on regional growth rates in each sector). Conversely, North America was the fastest-growing wellness region in 2017-2019 (8.4%), but then was among the hardest hit by the pandemic (-13.4%). Latin America-Caribbean's regional wellness market saw the greatest decline in 2020 (-22.1%) and was shrinking prior to the pandemic due to market volatility and economic crises in several of the region's largest countries.

Using this newly expanded dataset on the wellness economy by region and by country, GWI will be developing a new report that compares, ranks, and analyzes the wellness markets in countries around the world (forthcoming in January 2022).

With the addition of mental wellness last year, the wellness economy now comprises eleven sectors. The sizes and growth rates for all eleven sectors are presented in the table below. Note that GWI's 2017 figures for all of the wellness sectors have been revised, and they differ from the data presented in the 2018 *Global Wellness Economy Monitor* (see box below for an explanation of the revisions). We present figures here for 2017, 2019, and 2020, in order to provide a consistent time series for all of the sectors and a better understanding of the impacts of COVID-19. The overall wellness economy and most (but not all) of the eleven sectors peaked in 2019, and then declined in 2020 due to the pandemic.

Personal care & beauty and *healthy eating, nutrition, & weight loss* are the largest sectors in the wellness economy (and are now similar in size); together, these two sectors account for 44% of the entire global wellness market. *Physical activity, wellness tourism, and traditional & complementary medicine* comprise the rest of the top five largest sectors. The relative sizes and ranked order of many of the wellness sectors have changed quite a bit since the 2018 *Global Wellness Economy Monitor*, due to redefinitions and revisions in the measurements for some sectors (see box below for more explanation), along with varying levels of growth or decline during the pandemic.

Wellness Economy Sectors, 2017, 2019, 2020

	Wellness Economy (US\$ billions)			Average Annual Growth Rate	
	2017*	2019	2020	2017-2019	2019-2020
Personal Care & Beauty	\$1,021.6	\$1,097.3	\$955.2	3.6%	-13.0%
Healthy Eating, Nutrition, & Weight Loss	\$858.1	\$912.3	\$945.5	3.1%	3.6%
Physical Activity	\$789.5	\$873.8	\$738.1	5.2%	-15.5%
Wellness Tourism	\$617.0	\$720.4	\$435.7	8.1%	-39.5%
Traditional & Complementary Medicine	\$376.2	\$431.9	\$412.7	7.1%	-4.5%
Public Health, Prevention, & Personalized Medicine	\$328.3	\$359.1	\$375.4	4.6%	4.5%
Wellness Real Estate	\$148.5	\$225.2	\$275.1	23.2%	22.1%
Mental Wellness	N/A	\$122.3	\$131.2	N/A	7.2%
Spas	\$93.6	\$110.7	\$68.0	8.7%	-38.6%
Workplace Wellness	\$47.7	\$52.2	\$48.5	4.6%	-7.0%
Thermal/Mineral Springs	\$56.1	\$64.0	\$39.1	6.8%	-38.9%
Wellness Economy	\$4,317.3	\$4,909.9	\$4,369.3	6.6%	-11.0%

* 2017 figures have been revised since GWI released the previous version of the Wellness Economy Monitor (see box below for more details).

Note: Figures do not sum to total due to overlap in sectors.

Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

Revisions and Updates to the Wellness Economy Sector Data

The 2017 wellness economy figures that are presented in this report (for each of the eleven sectors, and for the overall wellness economy) have been revised and are slightly different from the figures presented in the 2018 *Global Wellness Economy Monitor*. These adjustments were made for a number of reasons, including changes in sector definitions and measurements to reflect the evolution of the wellness market, as well as revisions in the underlying data sources that are used for making GWI's estimates for certain sectors. International organizations that aggregate large, cross-country datasets (e.g., World Bank, World Health Organization, Euromonitor, etc.) gather their data from individual country sources across dozens of countries. Since every country has its own release schedule for different streams of data, the data aggregators will retroactively revise their cross-country datasets and estimates, as new, updated data become available in individual countries. This is a common and expected practice among data aggregators, and GWI's updates reflect this process, as well as our own revisions as better data become available in some of the countries and segments that we analyze.

Some readers may remember GWI reporting the size of the global wellness economy as "\$4.5 trillion" in the last couple of years, and then wonder why that number does not appear in this report. The estimate of \$4.5 trillion was a hybrid number, combining multiple years of data across different wellness sectors (2019 data for mental wellness, 2018 data for physical activity, and 2017 data for the other nine sectors). The two previous GWI reports where the \$4.5 trillion figure appeared were clear in explaining this approach. GWI has used this figure as a rough estimate or a "placeholder" update to cover the three-year gap between the last official wellness economy data (for 2017) and the current report. The \$4.5 trillion figure was a reasonable estimate showing the growth between the 2017 figure (now \$4.3 trillion) and the 2019 figure (\$4.9 trillion).

In this report, we present figures for 2017, 2019, and 2020. All data revisions and adjustments have been made across all three years, in order to provide a consistent time series for all sectors. Specific changes for each sector are as follows:

Spas: Although the spa establishment estimates have not changed (because they are developed via primary research by GWI), we have adjusted the types of data presented for the spa sector in this report. In the past, GWI estimated not only the revenues of spa establishments, but also the spending by supporting and enabling activities (e.g., spa consulting, education/training, media and events, associations, and capital investment). Together, the spa revenues and the supporting activities comprised the "spa economy." In this report, GWI has removed the estimates of the supporting sectors, and we only include the spa establishment revenues in the

overall wellness economy measurement. The reason for this change is because we do not include supporting activities for other wellness economy sectors, but rather focus specifically on consumer spending and consumer-facing activities. Using only the spa establishment revenues in this report keeps the spa sector measurements consistent with other sectors, which is important now that we are developing expanded, time-series wellness economy data across all countries and regions.

Personal Care & Beauty; Physical Activity; Wellness Tourism; and Mental Wellness:

These sectors' figures have changed slightly due to revisions in underlying datasets from Euromonitor, which are used as a basis for GWI's estimates for certain components of each sector.

Healthy Eating, Nutrition, & Weight Loss: Adjustments in this sector are for two reasons: 1) data revisions and updates made by two key underlying data sources (Euromonitor and IBISWorld); and 2) GWI has expanded the definition of this sector to include additional categories (e.g., foods/beverages free from gluten, dairy, lactose, and meat; as well as foods/beverages targeting weight management), reflecting the expansion of consumer interests and the wellness market in these areas.

Traditional & Complementary Medicine: 2017 figures were adjusted due to revisions in underlying data from Euromonitor, as well as improved data availability for several key countries.

Public Health, Prevention, & Personalized Medicine: 2017 figures were adjusted for two reasons: 1) revisions in underlying health expenditures data from the World Health Organization; and 2) GWI has redefined the personalized medicine subsector to focus more narrowly on personalized diagnostics (e.g., genetic, molecular, and environmental screening, analysis, and diagnostics).

Wellness Real Estate: 2017 figures were adjusted due to revisions in underlying construction output data from the World Health Organization.

Workplace Wellness: 2017 figures were adjusted due to revisions in underlying data from the International Labour Organization, which is used as a basis for GWI's estimates.

Thermal/Mineral Springs: 2017 figures were adjusted due to improved data availability in a few countries.

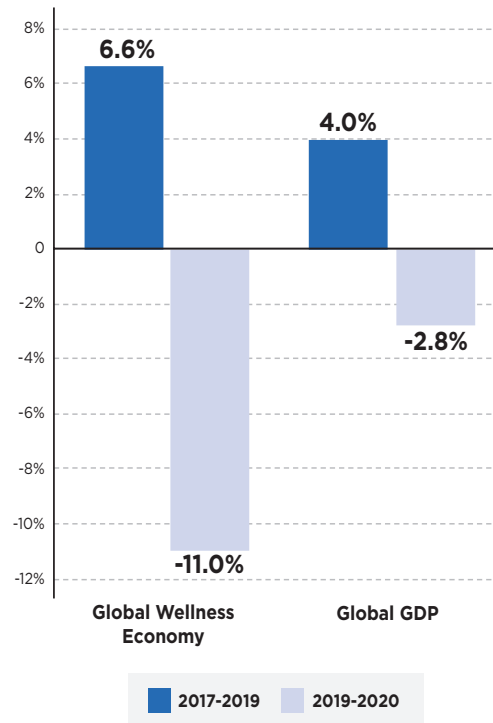
Who are the “winners” or “losers” from the pandemic?

There is no question that consumer interest in all things related to wellness has been rising rapidly, and in many ways, interest accelerated during the pandemic (even as consumer spending on wellness declined). Wellness is becoming embedded in mainstream consumer lifestyles and is ubiquitous in media and retail. Wellness is now a differentiator or selling point for all types of products, services, and technologies. The upward momentum in the wellness economy is evident in the strong growth rates posted by all eleven wellness sectors from 2017-2019. All but two wellness sectors (and the overall wellness economy) were growing faster than global GDP prior to COVID-19 (see charts to the right and below). From 2019-2020, the wellness economy contracted by nearly four times as much as global GDP, due to the widespread disruptions of the pandemic.

Looking at the 2019-2020 growth rates, it is tempting to label sectors as “winners” and “losers” from the COVID-19 pandemic. At a fundamental level, wellness as a concept is a clearly a winner, as people all over the world have woken up to the importance of healthy lifestyles and personal resilience as a first line of defense against chronic and infectious disease. The 2020 performance of the wellness economy and its eleven sectors is the result of the interplay of many factors:

- Travel bans, border closings, business/school shutdowns, lockdowns, stay-at-home orders, and social distancing have hurt the service sector disproportionately, including many activities in the wellness economy.
- Disruptions in the global supply chain during the pandemic (factory and port shutdowns, labor and input shortages, temporary trade restrictions etc.), along with temporary retail store shutdowns, have had a negative impact on the sales of many wellness-related products (from personal care and cosmetics, to shoes and apparel).
- The sudden brake on economic activities worldwide led to business closures, job furloughs and layoffs, and a collapse in consumer spending power across the global population, especially for people living in lower-income countries and where social safety nets are weak. Global consumer spending fell by 4.2% from 2019-2020.³ This decline in consumer demand ripples throughout the global economy, and it especially affects spending in areas where consumers deem their purchases “discretionary” or as “luxuries.”

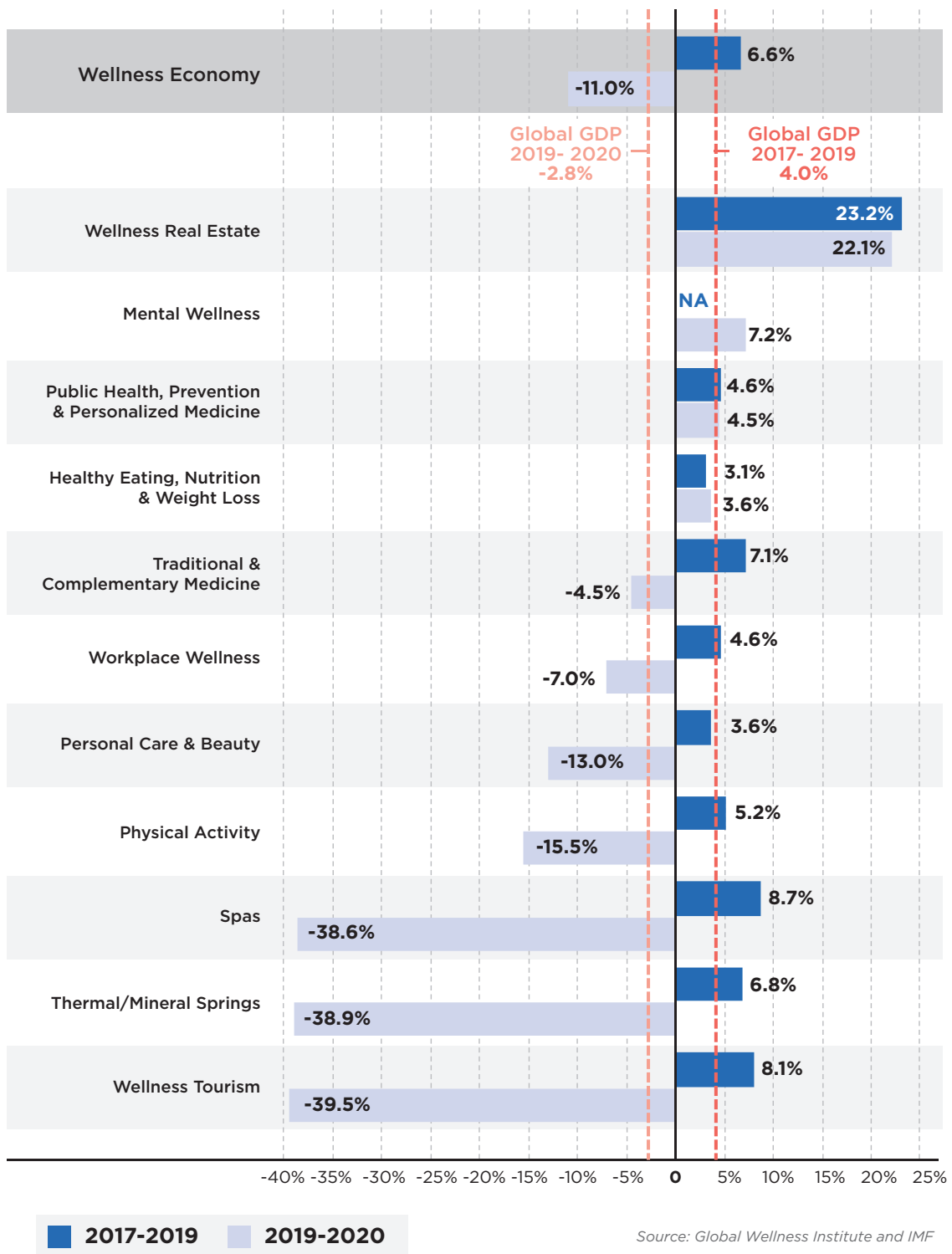
**Average Annual Growth:
Wellness Economy versus Global GDP**



Source: Global Wellness Institute and IMF

³ Based on consumer expenditures data from Euromonitor, accessed November 11, 2021.

Average Annual Market Growth: 2017-2019 and 2019-2020



The growth rates for the individual wellness sectors also mask the uneven impacts within each sector that result from the following:

- The wealth and income gap between the rich and the poor has widened amidst global economic upheaval, further expanding the schism between the luxury and mass markets. For some wealthy consumers in high-income countries, their spending on wellness may have changed very little during the pandemic, while many middle-/low-income consumers had little time or money to spend on wellness in 2020.
- Across all wellness sectors (and the entire economy), consumer spending on services sank while the demand for goods and products often moved in different directions. Consumers shifted their expenditures to new categories of products and services when their typical preferences were not available (e.g., buying an at-home exercise bike rather than paying for a gym membership, purchasing luxury bath and aromatherapy products rather than visiting a spa). While most consumers are eager to return to in-person experiences, some of these spending shifts and new habits are likely to endure post-pandemic.
- Services and activities enabled by technology have replaced things that were previously experienced and delivered in person, spurring many new innovations and a boom in the tech sector, while cutting many old jobs. COVID-19 greatly accelerated the shift to virtual delivery channels for many wellness sectors, including exercise, yoga, meditation, and mental wellness.

In every way, COVID-19 is a classic “shock” – an external event that derails the prevailing trajectory of economies and industries. The eleven wellness sectors encompass many different types of consumer activities and expenditures, including products, services, travel, and technology. Within every wellness sector, there were winners and losers, depending on how many factors played out: how businesses reach their customers (via in-person services, versus in-person or online product sales, versus virtual platforms); whether the expenditures were deemed by consumers to be “essential” or “discretionary”; and how businesses were able to pivot their business models in order to meet consumer needs under pandemic-induced conditions and restrictions.

Below is a summary analysis of the wellness economy sectors that grew and shrank during the pandemic (note that more detailed analysis is provided in the chapters for specific sectors).

Wellness sectors that grew during the pandemic (2019-2020):

- **Wellness real estate** (+22.1%) has maintained the highest growth rate in the wellness economy, both before and during the pandemic. COVID-19 has accelerated the growing understanding among consumers and the building industry about the critical role that external environments play in our physical and mental health and well-being.
- **Mental wellness** posted strong growth in 2020 (+7.2%) as consumers desperately sought out products, services, and activities to help them cope with the immense stresses they faced during the pandemic. Many mental wellness activities are done at home or via tech platforms (e.g., meditation, online self-help groups, relaxation activities) and many products are inexpensive and/or easily purchased online (e.g., meditation accessories, aroma and white noise products, stress gadgets and weighted blankets, brain health supplements, etc.), which helped to keep spending high amidst COVID disruptions.

- **Public health, prevention, & personalized medicine** maintained its growth momentum in 2020 (+4.5%), due to many governments and healthcare systems accelerating their public health and prevention expenditures during the pandemic.
- **Healthy eating, nutrition, & weight loss** (+3.6%) grew as consumers sought out a variety of processed/packaged foods and beverages, vitamins, and supplements that they believed would strengthen their immunity and help ward off disease during the pandemic. GWI cautions that the growth in this sector should not be interpreted as “consumers were eating healthier” during the pandemic, as there is scant scientific evidence and no consensus on how healthy these products actually are. In addition, the growth in some countries reflects rising food prices due to the pandemic, rather than an actual increase in consumer purchases.
- Even though the overall physical activity sector shrank, the **fitness technology subsector** exploded in 2020 (+29.1%), as millions of consumers switched their exercise-related spending to workouts via digital platforms (streaming and apps).

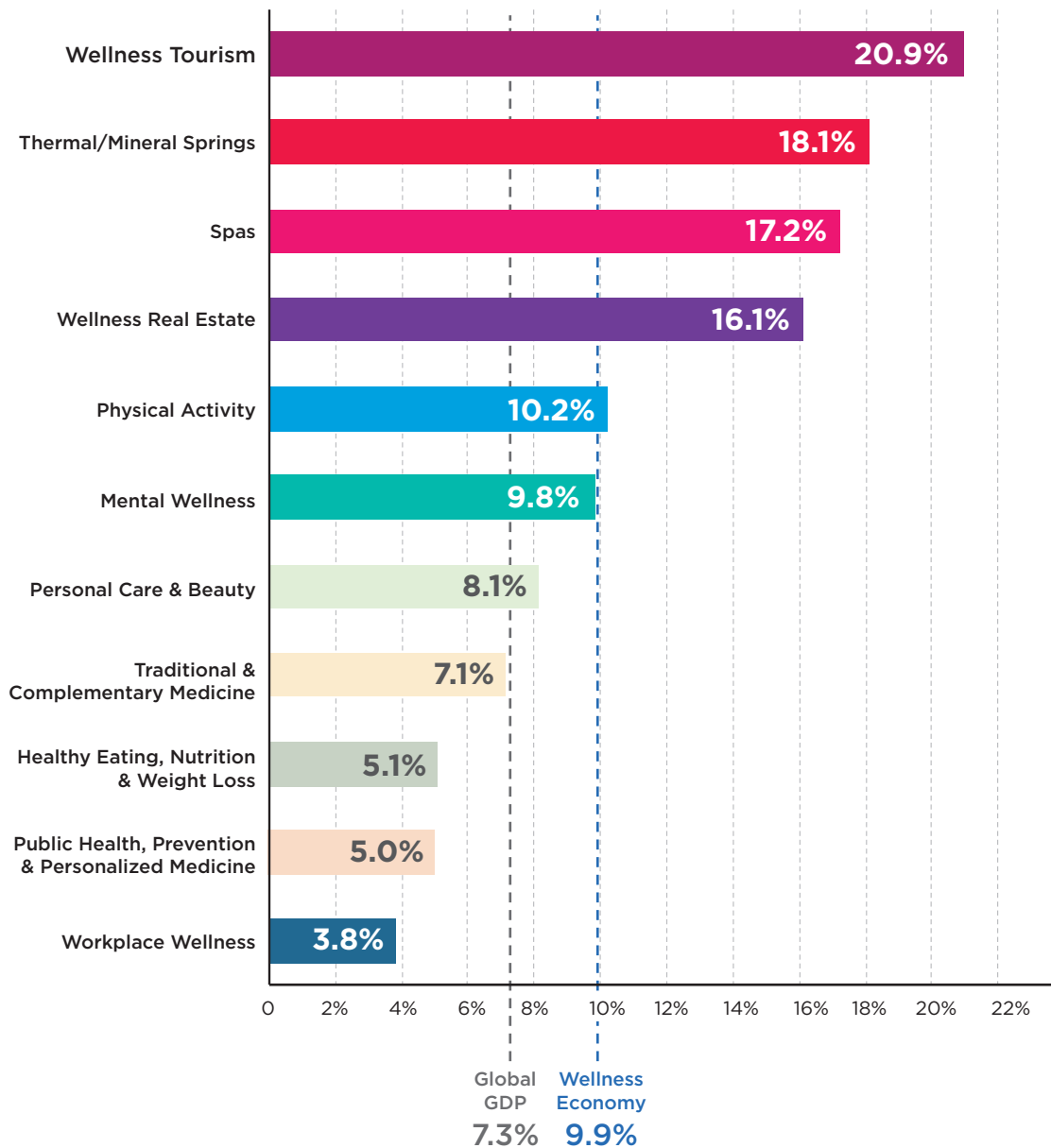
Wellness sectors that shrank significantly during the pandemic:

- **Personal care & beauty** shrank in 2020 (-13.0%), due to the overall decline in consumer spending and a reduction in discretionary purchases, along with retail store shutdowns and global supply chain disruptions.
- **Physical activity**-related expenditures declined significantly (-15.5%), due to the widespread shutdowns of exercise and sports facilities, in-person classes, and youth sports; stay-at-home orders; and a reduction in discretionary consumer spending on sports apparel and footwear.
- **Wellness tourism** (-39.5%), **spas** (-38.6%), and **thermal/mineral springs** (-38.9%) are the wellness sectors that were most adversely affected by COVID-19, due to travel restrictions, stay-at-home orders, and business shutdowns. Virtual offerings are a poor substitute for a physical presence and full immersion in these experiences.

What is the future of the wellness economy?

The COVID-19 pandemic has accelerated the ascendance of wellness as a dominant consumer value all around the world. Consumers are increasingly aware that all aspects of their lives – where they live; how they work; what they eat; and how they exercise, socialize and travel – impact their health outcomes, mental resilience, and overall sense of well-being. The questions on everyone’s minds: When will we return to the pre-2020 level of demand? What is the new normal? What is the future trajectory of the wellness economy?

Projected Average Annual Growth Rate by Sector, 2020-2025



Source: Global Wellness Institute and IMF

GW predicts that the wellness economy will return to its robust growth and will continue to expand its share in consumer spending and the global economy. In spite of the temporary shocks from the COVID-19 pandemic, the underlying forces that propel the growth of wellness remain as compelling as ever, including: the growing global middle class, population aging, the ongoing rise of chronic disease, and expanding consumer interest in and awareness of healthy lifestyles. And, the pandemic has brought new shifts that accelerate many wellness drivers, including a growing awareness of the role of the built environment in health, a growing focus on mental health and well-being, a rethinking of the balance of work and life, an expanding focus on social justice and environmental sustainability, and much more.

For the next five years, we project that the global wellness economy will grow at a robust rate of 9.9% annually, a growth rate significantly higher than projected global economic growth (7.3% according to current IMF forecasts). As the global economy rebounds from the shock of the pandemic, the wellness economy is expected to reach \$5.0 trillion in 2021 (exceeding its 2019 pre-pandemic peak), and it will grow to nearly \$7.0 trillion in 2025.

Wellness Economy Growth Projections by Sector, 2020-2025

	Market Size (US\$ billions)		Projected Market Size (US\$ billions)					Projected Average Annual Growth Rate
	2019	2020	2021	2022	2023	2024	2025	2020- 2025
Personal Care & Beauty	\$1,097.3	\$955.2	\$1,093.5	\$1,208.5	\$1,282.6	\$1,349.3	\$1,412.9	8.1%
Healthy Eating, Nutrition, & Weight Loss	\$912.3	\$945.5	\$986.3	\$1,035.8	\$1,089.2	\$1,147.2	\$1,209.9	5.1%
Physical Activity	\$873.8	\$738.1	\$828.0	\$907.7	\$999.9	\$1,094.5	\$1,198.8	10.2%
Wellness Tourism	\$720.4	\$435.7	\$652.8	\$816.5	\$928.2	\$1,030.6	\$1,127.6	20.9%
Traditional & Complementary Medicine	\$431.9	\$412.7	\$448.4	\$480.0	\$512.6	\$546.5	\$582.6	7.1%
Public Health, Prevention, & Personalized Medicine	\$359.1	\$375.4	\$394.5	\$412.4	\$429.7	\$453.3	\$478.3	5.0%
Wellness Real Estate	\$225.2	\$275.1	\$347.1	\$398.4	\$459.7	\$516.9	\$580.3	16.1%
Mental Wellness	\$122.3	\$131.2	\$147.5	\$163.4	\$180.1	\$195.5	\$209.8	9.8%
Spas	\$110.7	\$68.0	\$101.9	\$122.3	\$131.5	\$140.7	\$150.5	17.2%
Workplace Wellness	\$52.2	\$48.5	\$50.8	\$52.8	\$54.5	\$56.4	\$58.4	3.8%
Thermal/Mineral Springs	\$64.0	\$39.1	\$58.5	\$71.5	\$77.4	\$83.3	\$89.7	18.1%
Wellness Economy	\$4,909.9	\$4,369.3	\$5,040.2	\$5,588.7	\$6,055.1	\$6,514.9	\$6,992.0	9.9%

Note: Figures do not sum to total due to overlap in sectors.

Source: Global Wellness Institute estimates, based upon economic and industry sector projections from the IMF, ILO, Euromonitor, and GWI's data and projection model.

Most of the individual wellness sectors are projected to exceed GDP growth in the next five years. The sectors with the highest growth projections (wellness tourism, spas, thermal/mineral springs) are those that took the greatest hit in 2020. The growth rates for these sectors may seem abnormally high because they reflect a period of rapid post-pandemic recovery in 2021 and 2022, and then taper off to a growth trajectory similar to their pre-pandemic levels. Other sectors that maintained positive growth during the 2020 pandemic, including wellness real estate and mental wellness, are projected to continue their robust growth trends in the coming years.

While the wellness economy is well-positioned to recover and expand, future growth will likely look different from the past. Some industry segments may recover quickly from the short-term impacts of travel bans, business shutdowns, and capacity restrictions. Experiential activities, and those requiring physical touch or close contact, may return more gradually as consumers and markets balance vaccination rates and the fear of new waves of infection. Importantly, ***the COVID-19 experience has sparked some major shifts in how consumers understand, experience, and expect wellness.*** These shifts will have broad ramifications for the wellness economy and all of its sectors going forward.

1. Self-care for self-preservation and survival.

In consumer parlance, wellness is often equated with self-care – i.e., simply, taking care of yourself. While the notion of self-care has been gaining ground for many years, fueling the rapid growth of the wellness economy, it has often been associated with pampering or taking a respite from our daily responsibilities. The multitude of stressors unleashed by the pandemic have brought a profound shift in how we view self-care. Now, self-care is becoming a means for self-preservation and survival. How do I care for my own well-being so that I can cope with a difficult situation and not fall apart, in order to take care of myself, my family, and my responsibilities? The concept of self-care has expanded far beyond a bubble bath, a facial, a spin class, or a meditation session; it now extends to home-cooked meals, human connections, sleep, nature, financial wellness, search for purpose and meaning, and much more. The pandemic has revealed the multidimensional and omnipresent nature of wellness. For our survival and for our sanity, wellness is no longer something that we do for an hour a day, a few times a month, or only when we are on vacation; it is an essential focus to be embedded in our daily lives and priorities.

2. Prevention as a lifestyle and a public health priority.

Wellness has always been about staying healthy through our lifestyles, behaviors, and habits. The COVID-19 experience revealed the close connection between preventing infectious disease and preventing chronic disease. Data clearly show that people with chronic disease and poor metabolic health face much higher infection and mortality risks from COVID-19. This has spurred a surge of consumer interest in immunity – from “immune-boosting” foods, supplements, and therapies, to an expanding focus on exercise, sleep, gut health, stress management, and so on. The airborne nature of COVID-19 transmission also brought new attention to the longstanding, widespread problem of poor indoor air quality and environmental toxins, as well as the broader role played by our homes and built environments in harming or protecting our health, and in supporting/enabling healthy behaviors. The inequity in COVID-19 risks and COVID-19 deaths has sparked a widespread awakening to the inequities of preventive health and the external determinants of health. Public health on every level needs greater investment, and it must extend beyond vaccinations and anti-smoking campaigns to a more holistic and equitable promotion of healthy lifestyle habits and healthy living environments.

3. Wellness and science must move toward each together.

Wellness often gets a bad reputation from the quackery that has long been embedded in its practices, promoters, and businesses – i.e., dubious and sometimes harmful “cures” and quick-fixes, false claims of efficacy, magical thinking, bogus science, and even anti-science (as in the case of anti-vax influencers). As we have noted in the past, the wellness movement has been propelled by consumers and businesses, growing mostly outside of conventional medicine and its research, operational, and funding mechanisms. Rising consumer interest in all kinds of “alternative,” proactive, and lifestyle-based wellness modalities has forced medical science to play catch-up with the wellness industry. While many popular wellness modalities have been around for hundreds or thousands of years, scientific research and new technologies are now able to test and validate their benefits (e.g., for yoga, meditation, plant-based medicines, chiropractic, acupuncture, and psychedelics), leading to a gradual acceptance of some by mainstream medicine. Still, the consumer adoption of wellness practices is accelerating at a much faster pace than the scientific research, especially in areas like supplements and functional foods. Businesses looking to monetize a new fad are often too quick to make inferences from very limited evidence and exaggerate claims of efficacy. In the future, cost pressures on health systems, aging populations, and the rise of chronic disease around the world will force conventional medicine to increasingly look toward wellness and to value it for its holistic lifestyle approaches and therapies. But to avoid harming consumers, and to become truly complementary to healthcare, wellness entrepreneurs and businesses must embrace science and evidence, communicate honestly, and encourage consumers to do the same.

4. Leaning into nature for nourishment and healing.

When we define wellness as being holistic and multidimensional, we often include “environmental wellness” as a dimension without explicitly referring to nature. It is time to do so. The pandemic has put a spotlight on nature and its importance for our health and well-being. When we were warned during the height of pandemic lockdowns to stay away from other people, and to stop visiting exercise, recreation, and entertainment venues, we collectively turned to the outdoors. We took long walks in our neighborhoods, went jogging on the streets, and sought respite in urban green spaces and parks. We flocked to oceans and lakes for swimming, and to the woods for hiking and camping. During the pandemic, many of us discovered that nature is healing and nourishing for both our physical and mental well-being. We are even trying to bring more nature indoors, as evidenced by the spike in sales of houseplants during the pandemic. This renewed appreciation for nature will endure post-pandemic, and nature will feature prominently in many wellness experiences going forward – from exercising outdoors, to cherishing wildlife and natural landscapes, to discovering the little wonders and natural beauty hiding in our surroundings. And, of course, there is a close connection between the love of nature and the protection of planet earth. In the corporate world, there is some concern that sustainability took a backseat to health and equity issues during the pandemic, but the rising consumer appreciation and desire for nature will push wellness businesses toward a more regenerative and environmental direction in the long term.

5. Balancing physical and virtual connections.

Connection to other people is a vital part of being well; and yet, a global crisis of loneliness and fraying social fabric was unfolding long before COVID-19 introduced the concept of “social distancing.” Many pre-pandemic wellness trends clearly pointed to our desire to build connections and find a sense of belonging – for example, the growth of coworking and coliving, and the rise of fitness and hospitality brands that promote “finding my tribe.” COVID-19 prompted an almost instantaneous migration to digital platforms for all aspects of life: virtual classrooms and work meetings; exercise classes on YouTube; Zoom parties; virtual concerts and business conferences; apps for meditation, coaching, and therapy; hybrid weddings and funerals; and so on. Clearly, the tech sector has emerged as a clear winner in the pandemic. Tech businesses filled a critical void and showcased the advantages of digital platforms in scalability, accessibility, cost, privacy, and customization. Some tech businesses are doubling down, now looking to augmented reality and other emerging technologies to create immersive experiences. As we emerge from the pandemic and transition back to a physical world, a key question is whether and how much of these tech-based activities will endure, and under what conditions. Is the digital experience adequate for building and sustaining meaningful and enduring human connections? How is screen time harming us and our children? How much do we need to physically see and touch other people to feel loved and connected? No one knows the answer to these questions, at least not yet. Sorting out the balance between digital and physical connections will have ramifications across all sectors in the wellness economy going forward.

6. Mental well-being takes center stage.

Our mental unwellness has been a growing public health crisis for some time. Over 15% of the global population suffers from mental and substance use disorders.⁴ Dementia is on the rise; happiness is on the decline in many countries; and stress, worry, sadness, burnout, and loneliness are increasing all around the world. The COVID-19 pandemic has accelerated the deterioration of our collective well-being. It has exposed the wide gap between mental health needs and mental health resources, and our vulnerability to mental distress even when we do not have a diagnosed mental illness. In this dire landscape, mental wellness offers a path forward to help meet widespread needs and increase well-being for all. In fact, a big shift toward mental wellness is just beginning – as a personal pathway toward higher levels of well-being, as a workforce protection, and as a public health and community strategy. Practitioners and consumers have been leading the way, with the private sector creating new solutions, services, and products to help people build resilience and improve their mental wellness in their daily activities at homes, schools, and workplaces; in hospitality settings; and in the overall built environment.

7. A global values reset.

The COVID-19 experience has launched a global values reset that is manifesting across multiple wellness fronts. For many of us, being isolated at home has become a time for self-reflection and contemplation on our careers, family, and relationships, and even extending to deeper issues like our life purpose, gratitude, and compassion for others. The inequities in COVID-19 exposures, COVID-19 deaths, and pandemic-induced job losses and economic devastation have awakened

⁴ Authors' analysis of data from the *Global Burden of Disease Study 2019*, downloaded from: Institute for Health Metrics and Evaluation, *Global Health Data Exchange*, <http://ghdx.healthdata.org/>, accessed October 16, 2020.

in many people, businesses, and governments a new urgency for economic and social justice, which was further amplified in the United States last year by the George Floyd tragedy. Across all wellness arenas, uncomfortable questions are now being asked by consumers and the media: Is wellness a privilege or a basic right? Am I causing harm to the planet or amplifying injustice with my purchases? Are people and places being exploited by the wellness industry? Are non-white consumers, practitioners, and entrepreneurs being discriminated against or excluded? Are we appropriating the traditions of peoples who have been marginalized and oppressed? This global values reset is spreading into many spheres – environmental and social justice, mindful leadership, and even questioning the capitalist system itself – with broad ramifications in all sectors of the wellness economy. In the future, we expect to see more wellness businesses embrace “conscious capitalism,” incorporating United Nations Sustainable Development Goals (UN SDGs) as part of their corporate social responsibilities (CSRs), reporting on their environmental, social and governance (ESG) metrics, or adopting a benefit corporation status.

* * *

The following chapters of this report present detailed wellness economy data for each of the eleven sectors, with discussions on the broad shifts brought by the COVID-19 pandemic that are profoundly changing the landscape for consumers and businesses in each sector.

Research Methodology and Scope

The global wellness economy and sector data presented in this report are for the years 2017, 2019, and 2020. The definitions, conceptual frameworks, and estimation models for each of the wellness sectors are developed by the authors under the auspices of the Global Wellness Institute (GWI), consistent with the data and methodologies used in prior GWI studies over last the thirteen years. The authors have developed original, country-level data estimates for nine wellness economy sectors (spas; thermal/mineral springs; wellness tourism; workplace wellness; wellness real estate; physical activity; mental wellness; traditional & complementary medicine; and public health, prevention, & personalized medicine), based on GWI's proprietary models and databases and drawing on a wide variety of primary and secondary data sources. Figures for the other two wellness sectors (personal care & beauty, and healthy eating, nutrition, & weight loss) are aggregated primarily from Euromonitor and other secondary sources.

The analysis is based on extensive primary and secondary research conducted from January to October 2021, including literature reviews, data research, and expert interviews. Key public and private sources consulted include: Euromonitor International, World Bank, International Monetary Fund (IMF), World Health Organization (WHO), International Labour Organization (ILO), World Travel & Tourism Council (WTTC), World Tourism Organization (UNWTO), Statista, Eurostat, U.S. Bureau of Labor Statistics, U.S. National Institutes of Health, International Spa Association (ISPA), International Health, Racquet, & Sportsclub Association (IHRSA), International Coaching Federation (ICF), and Health Enhancement Research Organization (HERO). Other sources include global travel promotion and booking websites; numerous industry-specific organizations, databases, publications, and media sources (e.g., the *Global Wellness Trends Reports* by the Global Wellness Summit, *Spa Business Handbook*, *Spa Business Magazine*, *Club Industry*, *Health Club Management*, etc.); and dozens of government ministries and statistical agencies in countries around the world.

The authors have also benefited from the industry insights and technical inputs from several Global Wellness Institute Initiatives, including: Mental Wellness Initiative, Wellness Tourism Initiative, Wellness Communities & Real Estate Initiative, Workplace Wellbeing Initiative, and Hot Springs Initiative.

II. PERSONAL CARE & BEAUTY

Personal Care & Beauty: Definition, market size, and growth.

The personal care & beauty sector is broadly defined as **consumer spending on products and services for personal hygiene and appearance, encompassing the care of body, face, skin, hair, and nails**. This very large sector includes everyday products such as shampoos, soaps, and lotions; dental care; shaving; cosmetics and cosmeceuticals; and other hygiene and beauty items. It includes beauty, salon, hairdressing, and barbershop services (but excludes spas), as well as a variety of products and services marketed to address appearance and age-related issues.

Personal Care & Beauty Market by Region, 2017, 2019, 2020

	Personal Care & Beauty Market				Average Annual Growth Rate	
	(US\$ billions)			Per Capita 2020	2017-2019	2019-2020
	2017*	2019	2020			
Asia-Pacific	\$262.8	\$297.0	\$275.8	\$66.13	6.3%	-7.1%
Europe	\$290.4	\$303.8	\$273.6	\$296.25	2.3%	-9.9%
North America	\$289.0	\$320.4	\$263.3	\$716.44	5.3%	-17.8%
Latin America-Caribbean	\$122.6	\$112.7	\$86.4	\$132.18	-4.1%	-23.3%
Middle East-North Africa	\$36.2	\$41.5	\$37.2	\$74.18	7.0%	-10.2%
Sub-Saharan Africa	\$20.6	\$22.0	\$18.9	\$16.63	3.2%	-13.8%
WORLD	\$1,021.6	\$1,097.3	\$955.2	\$123.18	3.6%	-13.0%

* 2017 figures for this sector have been revised since GWI released the previous version of the Wellness Economy Monitor, due to data revisions and updates made by key underlying data sources such as Euromonitor.

Note: Figures may not sum to total due to rounding.

Source: Global Wellness Institute, based on data from Euromonitor.

Consumer spending on personal care & beauty grew from \$1,021.6 billion in 2017 to \$1,097.3 billion in 2019, and then declined by 13.0% to \$955.2 billion in 2020. By comparison, overall consumer spending grew at a similar rate from 2017-2019, but then fell by only 4.2% from 2019-2020¹ – i.e., personal care & beauty took a much greater hit during the pandemic than overall consumer spending. From 2019-2020, Asia-Pacific moved from being the third to first ranked region in size, because consumer spending on personal care & beauty shrank less in Asia than in other regions during the COVID-19 pandemic. While spending in every region fell from 2019-2020, Latin America-

¹ Based on consumer expenditures data from Euromonitor, accessed November 11, 2021.

Caribbean and North America faced the steepest declines in their personal care & beauty markets, with spending dropping by 23.3% and 17.8% respectively. On a per capita basis, North American consumers by far spend the most on personal care & beauty, with a per capita expenditure that is more than double the second ranked region (Europe).

Looking beyond COVID-19: Important shifts in personal care & beauty.

The personal care & beauty sector has been adversely affected by COVID-19 with the shutdown of service and retail outlets; the reduced need for cosmetics, fragrances, and personal grooming in an era of working from home and social distancing; as well as overall global economic decline. Some of these consumer spending and shopping habits will likely return after the pandemic, and most personal care & beauty product businesses are sorting out their physical, digital, and omnichannel strategies. However, the pandemic has also heightened and intensified shifts in this sector that relate to the broader concepts of wellness and the wellness economy.

Skin-deep versus inside-out.

Because beauty and personal care relate to our appearance, these concepts have always existed in a central yet uncomfortable space within wellness. Science suggests that human beings (and all living things) are innately drawn to beauty for survival and the perpetuation of our species. Caring for our appearance and expressing ourselves through our appearance are part of self-care and reflect a healthy human psyche. But there is also an ugly side to beauty. Judging people by their looks and giving attractive people special preferences and benefits – whether consciously or unconsciously – are both discriminatory and harmful. These commonplace occurrences demand deep human reflection, and they are the reason for a growing recognition of “unconscious bias” and training on this issue in professional fields and the criminal justice system.

In some ways, this duality in the world of beauty and personal care has been intensified during the COVID-19 pandemic. Long periods of staying at home, increased hours spent on social media, and screen-based meetings and gatherings have had wide-ranging impacts on people’s grooming habits. On the one hand, some people adopted a more casual attitude and cared less about their appearance because they didn’t have to go to the office and were spending less time in public (e.g., less coloring of gray hair, men growing long hair and beards, women wearing less makeup, etc.). On the other hand, some people have become more much critical of their own faces after staring at themselves on-screen for hours on end, or when comparing themselves to the edited and filtered “perfect” faces of social media stars. Emerging evidence indicates that pandemic-induced “Zoom dysmorphia” is sending more people to seek out cosmetic procedures or consultations on acne, wrinkles, and hair loss. If this development endures – holding ourselves to artificial standards, obsessing over every blemish or asymmetry in our features, and refusing to accept the reality of aging – these behaviors do not align with mental wellness and can even lead to mental health issues like anxiety, depression, and body dysmorphic disorder.

At the same time, the concepts of self-care, prevention, and healthy lifestyles have gained wider consumer awareness during the pandemic. Within the realm of personal care and beauty, there is deepening understanding that our external appearance is connected to our general state of health. Even as consumer spending on personal care and beauty shrank overall in 2020, skincare

as a subcategory has been more resilient than other segments like cosmetics and fragrances.² There is growing understanding that skincare is not just surface-level, and that healthy skin reflects our internal state of health and is connected to our diet, sleep, stress, exercise, and environmental exposures (to sun, chemicals and toxins, pollution, etc.). There is also increasing consumer interest in cosmeceuticals, dermatological supplements, and functional beauty beverages, even though many of these products are not yet backed up by rigorous scientific evidence. While consumer spending on personal care & beauty is expected to bounce back post-pandemic (with a projected 8.1% annual growth rate from 2020-2025), there will continue to be a rising tension between external and artificial “quick fixes” for beauty versus a holistic, inside-out notion of a healthy appearance.

Wellness within wellness: The emerging “clean” and “green” category.

Personal care & beauty has always been the largest sector within GWI’s wellness economy framework, but it is fair to question whether consumers truly associate all of the products and services within this space with wellness. Earlier, we noted how the pandemic has elevated the importance of self-care, immunity, and prevention; has deepened our appreciation of nature; and has increased our concerns with environmental impacts on health. These shifts are reflected in the growing consumer interest in “clean beauty” and personal care products that are labeled “clean,” “green,” “natural,” “non-toxic,” “botanical,” and the like. In response, major retailers and brands are launching clean beauty lines/sub-brands, many startups are emerging, and investment is flowing into this category. However, across the board there is major confusion about what any of these labels mean. There is no central arbiter or certification authority to verify that ingredients and formulations conform with these labels. Many of these so-called “clean” products are marketed as “free from” ingredients such as sulfates, parabens, and formaldehyde. Beyond that, what is accepted as “clean,” “green,” “natural,” or “non-toxic” is left to businesses and consumers to determine. For example, “green” can mean anything from being GMO-free, cruelty-free, or vegan, to the environmental impact of the production process or packaging, to the recyclability or life cycle of the product.

American consumers are especially interested in the “clean” label because the United States is behind other developed countries in banning harmful substances in personal care and cosmetic products (the United States restricts dozens of chemicals, as compared to more than a thousand in many OECD countries). The discrepancy is so wide that many major U.S. store brands are taking matters into their own hands, eliminating from their branded products and phasing out many toxic chemicals that are still permitted in the United States while banned in other countries. At the same time, the growing concern about toxicity has created a new segment of consumers who are obsessed with avoiding anything containing chemicals or “unnatural” ingredients, even when these beliefs are not grounded in scientific and medical literature. Some purely plant-based formulations can cause reactions and allergies in some people, which raises further questions about what labels

² See, for example: 1) Barbalova, I. and Oster, M. (2020). *Health and Beauty in the Coronavirus Era*. Euromonitor International. <https://go.euromonitor.com/webinar-bpc-2020-covidhealthbeauty.html>. 2) Beckwith, G. and Villena, K. (2021). *Beauty in Recovery: Going Green and Clean*. Euromonitor International. https://go.euromonitor.com/webinar-bpc-210622-beauty_state_of_play.html. 3) Villena, K. (2021). *World Market for Beauty and Personal Care*. Euromonitor International. <https://blog.euromonitor.com/world-market-for-beauty-and-personal-care-2/>.

such as “clean,” “natural,” or “non-toxic” really mean, and whether these products are truly safer and healthier for us or not. Regardless of the confusion and fragmentation in this space, the increasing visibility and declining price points of “clean” products will not only fuel mass market interest, but also consumer demand for more transparency in ingredients, labeling, formulations, and production processes.

Diversity and inclusion: The color of beauty and personal care.

The global social justice movement that accelerated during the pandemic is having wide-ranging impacts in the beauty and personal care industry. Self-care is about feeling good, and more consumers are starting to care about what a brand represents just as much as what its products would do for them. Increasingly, companies’ brand stories need to incorporate ESG (environmental, social, and corporate governance) components, from their packaging, ingredients, and supply chain transparency, to their labor policies, social responsibility, and diversity and inclusion. In the past two years, loud calls to combat racism are drawing attention to all aspects of the beauty industry where inequity and injustice exist. Investors, brands, and retail outlets are being asked whether they are doing enough to support and promote Black entrepreneurs and professionals – for example, in their investments, supply chains, shelf space, marketing supports, partnerships, and so on. Many Black and Brown consumers also feel that beauty and personal care brands do not “see” or value their unique needs, and that companies typically create skincare, haircare, sun care, and cosmetic products that are mainly for Caucasian skin types, hair types, and coloring.

The growing awareness and visibility of niche skincare, haircare, and cosmetics markets is a first step toward diversity and inclusion. But to truly honor the many colors of beauty and personal care, we need to ask: Who is setting the beauty standards? Are the faces of Instagram stars real? Why do people feel the need to whiten their skin, even using products that do long-term damage? Why do so many Asian people get double-eyelid surgery? Why are we so obsessed with anti-aging when aging is a natural and inevitable fact of life? Clearly, there is still a long way to go before we see a real democratization of beauty, when looking and feeling good is truly a form of self-expression, self-care, and self-love rather than judgment and self-doubt.

APPENDIX A: WELLNESS ECONOMY DEFINITIONS

1. The Wellness Economy and Its Eleven Sectors

Wellness is the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health.

The wellness economy encompasses industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives. There are eleven sectors in the wellness economy, as defined below.

Wellness real estate: Expenditures on the construction of residential and commercial/institutional (office, hospitality, mixed-use/multi-family, medical, leisure, etc.) properties that incorporate intentional wellness elements in their design, materials, and building as well as their amenities, services, and/or programming.

Physical activity: Consumer spending associated with intentional physical activities performed during leisure and recreation, including three recreational activity subsectors (sports and active recreation, fitness, mindful movement) and three enabling subsectors (technology, equipment and supplies, apparel and footwear). See more details about definitions below.

Healthy eating, nutrition, & weight loss: Includes consumer expenditures on:

1. Vitamins and dietary supplements (including herbal/traditional products) and sports nutrition products.
2. Weight loss/management products and services, including: packaged foods/beverages specifically positioned to target weight management; over-the-counter supplements and remedies targeting weight management (e.g., meal replacement or nutritional supplement drinks, non-prescription weight-loss drugs and supplements); and weight loss services and programs (e.g., physical or online dieting centers, workshops, counseling; nutritionists and dieticians).
3. Healthy-labeled foods and beverages, which encompasses a wide variety of processed and packaged foods and beverages that are specifically positioned, marketed or labeled with health and wellness claims, including low-sugar/low-fat/low-carb products; fortified/functional products with added nutrients (e.g., calcium, omega-3); products that are “free from” gluten/lactose/dairy/meat (e.g., plant-based alternatives, meat substitutes); products marketed as “naturally healthy” (e.g., high fiber, fermented, nuts/seeds); and organic products.

Mental wellness: Encompasses consumer expenditures on four categories of mental wellness-related products, services, and experiences: 1) self-improvement; 2) meditation and mindfulness; 3) brain-boosting nutraceuticals and botanicals; and 4) senses, spaces, and sleep. See more details about definitions below.

Workplace wellness: Includes expenditures on programs, services, activities, and equipment by employers aimed at improving their employees' health and wellness. These expenditures aim to raise awareness, provide education, and offer incentives that address specific health risk factors and behaviors (e.g., lack of exercise, poor eating habits, stress, obesity, smoking) and encourage employees to adopt healthier lifestyles.

Public health, prevention, & personalized medicine: Includes expenditures on medical services that focus on treating “well” people, preventing disease, or detecting risk factors – for example, routine physical exams, diagnostic and screening tests, genetic testing, etc. Personalized health uses advanced diagnostic tools for individual patients (including genetic, molecular, and environmental screening and analysis) to provide tailored approaches for preventing disease, diagnosing and managing risk factors, or managing and treating conditions.

Traditional & complementary medicine: Encompasses expenditures on diverse holistic, traditional, indigenous, and mentally- or spiritually-based healthcare and lifestyle practices, systems, services, and products that are not generally considered to be part of conventional medicine or the dominant health care system – including homeopathy, naturopathy, osteopathy, chiropractic, acupuncture, Traditional Chinese Medicine, Ayurveda, Unani medicine, energy healing, traditional/herbal remedies and supplements, etc. The nomenclature for this sector is evolving alongside growing consumer adoption of traditional/indigenous, complementary, alternative, and integrative medical practices outside of the conventional/Western medical system.

Personal care & beauty: Includes consumer expenditures on beauty and salon services (excluding spas); skin, hair, and nail care services and products; cosmetics, toiletries, and other personal care products; dermatology; prescription pharmaceuticals for skin care; as well as products and services that specifically address age-related health and appearance issues, such as cosmetics/cosmeceuticals for skin/face/body care, hair care/growth, and pharmaceuticals/supplements that treat age-related health conditions.

Wellness tourism: The aggregation of all expenditures made by wellness tourists – primary and secondary, international and domestic – including spending on lodging, food and beverage, activities and excursions, shopping, and in-country transportation. See more details about definitions below.

Spas: Aggregates the revenues of different types of spa facilities, including day/club/salon spas, hotel/resort spas, destination spas and health/wellness resorts, medical spas, thermal/mineral springs spas, cruise ship spas, and other types. See more details about definitions below.

Thermal/mineral springs: Encompasses the revenues of business establishments associated with the wellness, recreational, and therapeutic uses of water with special properties, including thermal water, mineral water, and seawater. See more details about definitions below.

2. Physical Activity

Recreational Physical Activities

Recreational physical activities are segmented into three categories (as described below). Many individuals will participate in multiple activities across these three segments, and so each category is measured separately; we account for overlap when we roll together the three categories to measure the total physical activity market.

We use a consumption-based approach for measuring the physical activity market, and for each segment we estimate two key indicators:

- **Participation in recreational physical activities:** The estimated percent of the population that participates in each category of recreational physical activity. In our dataset, “participation” is generally defined as doing the activity at least once a month or with some regularity. The participation estimates are agnostic of *where* or *how* people perform the activity. For example, people who do yoga may take a class at a specialized yoga studio, may take a class at a gym or YMCA, may use a streaming or on-demand class, or may simply practice yoga alone at home. For our estimates, all of these methods would count as “participation in yoga” if they are done with regularity.
- **Consumer spending on recreational physical activities:** The estimated direct, out-of-pocket expenditures by consumers each year in order to participate in each category of recreational physical activity. This figure is limited to expenditures on services for actually doing an activity – i.e., gym or studio memberships, fees for classes and training, sports team or club dues, entry fees for events/competitions/tournaments, and other associated services. Non-service expenditures are measured in separate, supporting categories (as described below). In some instances, fees may be subsidized (such as in facilities/programs run by nonprofits or local governments), and in these instances the study still counts consumer *participation* in the activity although out-of-pocket expenditures would be reduced or possibly zero. Likewise, for some activities there is no service provider or participation fee (for example, running in the park or playing a pickup basketball game with friends), and in these instances the study counts consumer *participation* in the activity although the expenditures are zero.

Sports and active recreation: This category encompasses a wide range of sports and recreation activities, including team sports (e.g., soccer, basketball, volleyball); individual sports (e.g., tennis, swimming, gymnastics); indoor sports (e.g., squash, wrestling, martial arts); outdoor sports (e.g., skiing, rowing, bicycling); as well as a variety of recreational pursuits (e.g., hiking, trail running, kayaking, parasailing, rock climbing, dancing). The common denominator among these is that they all involve movement and physical activity that contributes to good health. *Sports* are typically more structured, are governed by specific rules or forms, and often involve an element of competition; participants are usually motivated by mere enjoyment of the activity (fun and games), athletic achievement, competition, and/or camaraderie and team spirit. *Active recreation* activities are often less structured and formalized, although many do require instruction, mastering special skills, or adhering to specific systems or forms (e.g., different schools of martial arts and dance forms). Consumers may pursue active recreation because they enjoy the activity, working toward specific skills goals, being part of a community, and/or being outdoors. Sports and active recreation attract people of all ages and abilities – children, youth, adults, and seniors.

Fitness: Consumers engage in structured fitness activities with the intention of becoming physically fit or maintaining desired physical conditions, which may encompass cardiovascular health, functional fitness, flexibility and strength, and weight loss or weight management. Fitness activities most often take place at gyms, health clubs, and fitness studios, but can also happen in home-based gyms, outdoor gyms, community centers, schools, hotels, or other venues. These activities are often conducted under the supervision of trainers or are led by teachers in small or group class settings. Fitness activities usually rely on equipment or machines, or they follow a protocol of exercises for conditioning and training. As such, this category includes diverse activities, from indoor cycling/spinning, treadmill running, and weight training, to aerobic dance, Zumba, cardio kickboxing, HIIT, CrossFit, aqua aerobics, and much more. The participants in this market are primarily (but not exclusively) adults. Note that walking, running, jogging, and cycling in a gym, in a class, or using a piece of fitness equipment (treadmill or stationary bike) is included in the fitness category, while doing these activities outside of a gym-, class-, or equipment-based setting is generally counted as part of sports and active recreation.

Mindful movement: This category captures the exercise modalities that combine movement with mental/internal focus, body awareness, and controlled breathing, with the intention to improve strength, balance, flexibility, posture and body alignment, and overall health. Mindful movement includes activities such as yoga, tai chi, qigong, Pilates, stretch, and barre, as well as other less mainstream somatic, bodywork, and energy-based methods such as Gyrotonic and Gyrokinesis, Nia Technique, Feldenkrais Method, and 5Rhythms. While these classes are increasingly offered at gyms and fitness studios as part of a comprehensive fitness class offering, consumers usually turn to them with the intentions of improving mind-body health and mental focus, and for stress-relief and mindfulness, in addition to physical exercise. The participants in this market are primarily (but not exclusively) adults.

Physical Activity Enabling Sectors

In addition to direct expenditures on services, consumers also make related purchases that enable and support their participation in recreational physical activities. We measure three categories of enabling sectors:

Technology: In recent years, technology has greatly transformed the fitness and physical activity markets, enabling consumers to track their own metrics, monitor performance and progress, access programs and services on demand, and connect with communities. This category includes technology-enabled hardware/devices and software/services that support fitness, sports, and active recreation. Hardware, equipment, and devices include: wearable fitness trackers (e.g., fitness bands such as Fitbit, Garmin, Polar, Huawei Band, Xiaomi Mi Band, and other types of step/movement/cardio trackers, but excluding the broader category of smartwatches, like Apple Watch, which are not exclusively for fitness); smart/sensor-embedded fitness and sports clothing, shoes, and eyewear; and smart/sensor-embedded/networked fitness equipment and sporting goods. Software, apps, and services include: fitness, exercise, and nutrition apps and online services that are used for tracking, analyzing, learning, and sharing activities and achievements (e.g., My Fitness Pal, Samsung Health, Google Fit, Runtastic, Pacer, Yodo Run); streaming and on-demand fitness workout/class services (e.g., Peloton, Mirror, Keep, Beachbody On Demand, Daily Burn, Daily Yoga); and fitness, sports, and recreation intermediary, booking, management, and marketing software, apps, and platforms (e.g., ClassPass, Mindbody, Active Network, Daxko, My PT Hub).

Equipment and supplies: This category includes a wide variety of equipment and supplies used to engage in fitness, sports, and active recreation, including sporting goods (e.g., balls, rackets, bats, and clubs; bicycles; climbing equipment; ice skates; etc.); protective gear (e.g., helmets, padding, gloves, etc.); as well as fitness/exercise/training equipment and supplies (e.g., treadmills, stationary bikes, other gym equipment, free weights, resistance bands, blocks, mats, etc.). This measurement captures the entire market size for these kinds of equipment and supplies, whether they are sold directly to consumers or to gyms, health clubs, sporting clubs, etc.

Apparel and footwear: This category captures the clothing and footwear used for fitness, sports, and active recreation, from ski pants to yoga leggings, and from running shoes to hiking boots. Since dressing has become more casual over the past few decades, and fitness has become both a daily activity and an aspirational lifestyle in many places, it is increasingly common for people to wear athletic/sports-inspired clothing and athletic shoes as everyday casualwear (i.e., “athleisure”). Therefore, it would be impossible to separate what consumers purchase and wear specifically and exclusively for physical activity, when those same pieces of clothing and shoes are also worn outside of the gym or when people are not exercising.

3. Mental Wellness

Mental wellness is an internal resource that helps us think, feel, connect, and function; it is an active process that helps us to build resilience, grow, and flourish. The mental wellness sector encompasses consumer spending across four subsectors, as described below.

Self-improvement: Includes a wide range of activities typically associated with self-help and personal development, which can be done individually, in groups, and with professional guidance and support. The sector includes: self-help books; self-help gurus, organizations, and institutes that deliver a variety of classes, workshops, seminars, and retreats; self-help organizations and mutual support groups; personal and life coaches; cognitive enhancement and brain training products and services; a wide array of self-help apps and online platforms; and anti-loneliness efforts. This sector is especially hard to quantify because the activities overlap with so many other sectors. Self-help gurus, groups, and organizations now deliver content through a variety of media channels (e.g., Instagram, Facebook, Reddit, YouTube, websites, magazines, TED talks, podcasts, etc.), which cannot be easily separated as a consumer spending category.

Meditation & mindfulness: Includes all forms of meditation practice, related/spin-off mindfulness practices (e.g., breathwork and breathing methods, guided imagery, body scan, relaxation exercises), and products and services that support these practices. Key spending categories include classes, teachers, retreats, online platforms, apps, books, and videos. There is a growing market for meditation accessories (e.g., cushions, beads, chimes) and mindfulness products (e.g., journals, coloring books), as well as a fast-growing range of connected gadgets, trackers, monitors, and aids to support meditation (e.g., headbands, headsets, glasses, wearable sensors, lamps) – many of which build upon biofeedback, neurofeedback, and virtual reality technologies.

Brain-boosting nutraceuticals & botanicals: Includes products that we ingest or put into our bodies with the specific aim of improving our mental health and well-being. Many over-the-counter natural supplements, herbals and botanicals, and traditional remedies specifically claim to support better sleep, brain health, memory, energy, and overall mental wellness. A wide range of functional foods and beverages claim to have brain health benefits, across nearly every

packaged food and beverage category. There is growing interest in the potential of cannabis and its derivatives, psilocybin, and other plant-based and synthetic psychedelic drugs for both mental wellness and treatment purposes. A growing number of supplements and functional foods and beverages incorporate cannabis, hemp, CBD, THC, and medicinal mushrooms. (Note that our figures include only the legal, over-the-counter cannabis and cannabis derivatives market.) Most of the expenditures in this category overlap with the *healthy eating, nutrition, & weight loss* and *traditional & complementary medicine* sectors, and we account for this overlap when aggregating the figures for the overall wellness economy.

Senses, spaces, & sleep: Includes products, services, and design that target our senses and the mind-body connection, based upon the growing understanding that environmental stimuli have a major impact on our mood, stress levels, sleep, and mental health and well-being. This broad sector encompasses sound (sound healing, white noise, noise cancellation, wellness music); scent (aromatherapy, home fragrances); light (circadian lighting, light therapy consumer products); and touch (stress toys and gadgets, weighted blankets). Sleep is a major focus of this sector, with an exploding array of sensory products and services that promote relaxation and improve our sleep environments (e.g., sleep accessories, smart bedding, nap cafés, sleep retreats, etc.). Many new tech gadgets, wearables, and apps target sleep hygiene, ambience, and tracking. Multi-sensory experiences are appearing in wellness travel, spas, fitness, and entertainment venues (e.g., forest bathing, hugging therapy, scream therapy, laughter yoga, cuddle parties, flotation tanks), while sensory-based design and architecture are a rapidly growing part of wellness real estate (biophilic design, human-centric lighting). Some of the expenditures in this category overlap with the *wellness real estate* and *traditional & complementary medicine* sectors, and we account for this overlap when aggregating the figures for the overall wellness economy.

4. Wellness Tourism

Wellness tourism: Travel associated with the pursuit of maintaining or enhancing one's personal well-being.

Primary wellness tourist: A tourist whose trip or destination is primarily motivated by wellness.

Secondary wellness tourist: A tourist who seeks to maintain wellness while traveling, or who participates in wellness experiences while taking any type of trip for leisure or business.

International wellness tourism receipts: All receipts earned by a country from inbound wellness tourists visiting from abroad with an overnight stay.

Domestic wellness tourism expenditures: All expenditures in a country made by wellness tourists who are traveling within their own country with an overnight stay.

5. Spas

Spa establishments: Spas are defined as establishments that promote wellness through the provision of therapeutic and other professional services aimed at renewing the body, mind, and spirit. Spa facilities offer a wide variety of services (e.g., massages, facials, body treatments, salon services, water-based treatments, health assessments, and more) as well as sales of related products. Specific types of spas are defined below.

Day/club/salon spas: Offer a variety of spa services (e.g., massages, facials, body treatments, etc.) by trained professionals on a day-use basis. Club spas are similar to day spas but operate out of facilities whose primary purpose is often fitness. Salon spas operate out of facilities that provide beauty services (such as hair, cosmetics, nails, etc.).

Destination spas and health resorts: Offer a full-immersion spa experience in which all guests participate. In addition to spa and body treatments, all-inclusive programs typically include a myriad of other offerings such as: fitness, mind/body, special diets and cleanses, energy work, personal coaching, nutritional counseling, weight loss, sports medicine, preventive or curative medical services, etc. This category also includes the traditional sanatoria and health resorts in Europe that offer spa-like services (e.g., massage, hydrotherapy, thermal water bathing, etc.) for wellness and therapeutic purposes.

Hotel/resort spas: Located within a resort or hotel property, providing spa services on an à la carte basis to hotel guests and outside/local guests. Spa treatments and services generally complement a hotel stay or a wide range of other activities at a resort.

Thermal/mineral springs spas: Include the revenues generated by spa- and wellness-related treatments (such as massage, facials, hydrotherapy, etc.) at the following types of establishments: day-use spa facilities and destination/health resorts that incorporate an on-site source of natural mineral, thermal, or seawater into their spa treatments, as well as other bathing/recreational springs establishments that offer complementary spa services.

Medical spas: Operate under the full-time, on-site supervision of a licensed healthcare professional, providing comprehensive medical and/or wellness care in an environment that integrates spa services with traditional, alternative, or cosmetic medical therapies and treatments.

Other spas: Includes all other facilities that are not captured by the categories described above, such as cruise ship spas, airport spas, mobile spas, as well as historically-/culturally-based facilities (e.g., Turkish hammams, Indian Ayurveda centers, etc.) that have incorporated spa-like services into their offerings.

6. Thermal/Mineral Springs

Thermal/mineral springs establishments: Revenue-earning business establishments associated with the wellness, recreational, and therapeutic uses of waters with special properties. Our figures count thermal/mineral springs establishments that operate as a business, and as such, do not include springs that do not have any built facilities and/or do not charge any kind of fee for access. Establishments that use heated water – not naturally-sourced thermal/mineral water – are also excluded from this category. There are many categories and types of thermal/mineral springs establishments, as illustrated below:

Types of Thermal/Mineral Springs Establishments

Primarily Recreational	Primarily Wellness	Primarily Therapeutic or Curative
Thermal/mineral water swimming pool facilities	Thermal/mineral water bathing facilities	Health resorts and sanatoria that use thermal/mineral waters for treatments
Thermal/mineral water-based waterparks	Thermal/mineral water-based spas	
Hotels/resorts with thermal/mineral water swimming pools	Thalassotherapy spas and resorts	
Thermal or hot springs resorts		

Our revenue estimates include *all* revenues earned by the establishments in the above categories (not just revenues from thermal/mineral-water bathing and treatments). Therefore, our estimates include revenues earned from: bathing/swimming offerings, spa/wellness services and other treatments, other recreational activities, food and beverage, lodging, and other services offered by the establishment.

Our figures are further broken down into two categories, in order to delineate the overlap between the thermal/mineral springs sector and the spa sector:

Thermal/mineral springs establishments that offer spa services: These facilities offer complementary, spa-like services (e.g., massage, facials, hydrotherapy, other treatments) alongside their bathing offerings, and often incorporate the thermal/mineral water into treatments. They include the health resorts and sanatoria across Europe that use thermal/mineral waters for therapies and the hot springs resorts common in China and Taiwan, as well as the growing number of bathing establishments that are offering add-on spa services alongside thermal/mineral water bathing and relaxation. These establishments and their revenues are also counted as part of the spa sector figures, and we account for this overlap when aggregating the figures for the overall wellness economy.

Thermal/mineral springs establishments with no spa services: These are typically recreational and bathing-only facilities, such as most of the onsen in Japan, the thermal pools and waterparks that are common in Latin America, and the thermal water swimming pool facilities prevalent in Iceland.

APPENDIX B: ACKNOWLEDGEMENTS

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