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EMPOWERING WELLNESS WORLDWIDE

FEBRUARY 2022

The Global Wellness Economy: Country Rankings



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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: Country Rankings was prepared by Ophelia Yeung and Katherine Johnston, with assistance 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.

I. INTRODUCTION: THE GLOBAL WELLNESS ECONOMY

In December 2021, the Global Wellness Institute (GWI) released its new research report, *The Global Wellness Economy: Looking Beyond COVID*.¹ This expansive report provided in-depth data and analysis for the wellness economy and its eleven sectors – including their size, performance, and growth trajectories – and it described how the COVID-19 pandemic has and will continue to impact these sectors. The report provided a new way to assess the wellness economy by giving sector-by-sector detail for each region around the world. The comprehensive data provided an insightful look into each wellness sector's distribution across different regions, adding greater dimension and insight into the wellness economy.

This companion report – *The Global Wellness Economy: Country Rankings* – provides an even greater understanding of the relative strengths of countries' wellness sectors and policies. In this report, we present a summary analysis of the wellness economy at the regional level for six major regions, accompanied by a wellness economy data profile for each region. Using our newly expanded dataset, which breaks out all of the eleven wellness sectors by region and by country, we are now able to compare the size and composition of the wellness economy across different parts of the world. **Specifically, we rank 150 countries by the size of their wellness economies, compare wellness to the size of each country's overall economy, and examine per capita spending on wellness.** Applying simple statistical analysis (depicted by scatterplot diagrams), we examine various country-level characteristics that have a strong correlation to higher levels of spending on wellness, including GDP, population size, per capita income, and level of tourism dependence.

This geographical comparative analysis allows us to examine several new questions including:

- How is the global wellness economy distributed across the world?
- How do the size, growth, and composition of the wellness economy vary across different countries and regions, and what do those differences tell us?
- How did the pandemic affect wellness spending across different countries and regions?
- What factors are associated with higher levels of wellness spending across different countries?

The answers to these questions give us a better understanding of *how* and *why* the wellness economy varies across different countries. They also indicate what further analysis would be helpful to enhance our knowledge about the rapidly evolving and expanding wellness economy and how it is connected to each country's health and well-being. In the future, GWI aims to conduct statistical analysis to analyze these relationships, and to identify gaps where policy interventions may help to improve wellness-enhancing environments and access to wellness-related activities for peoples across all regions.

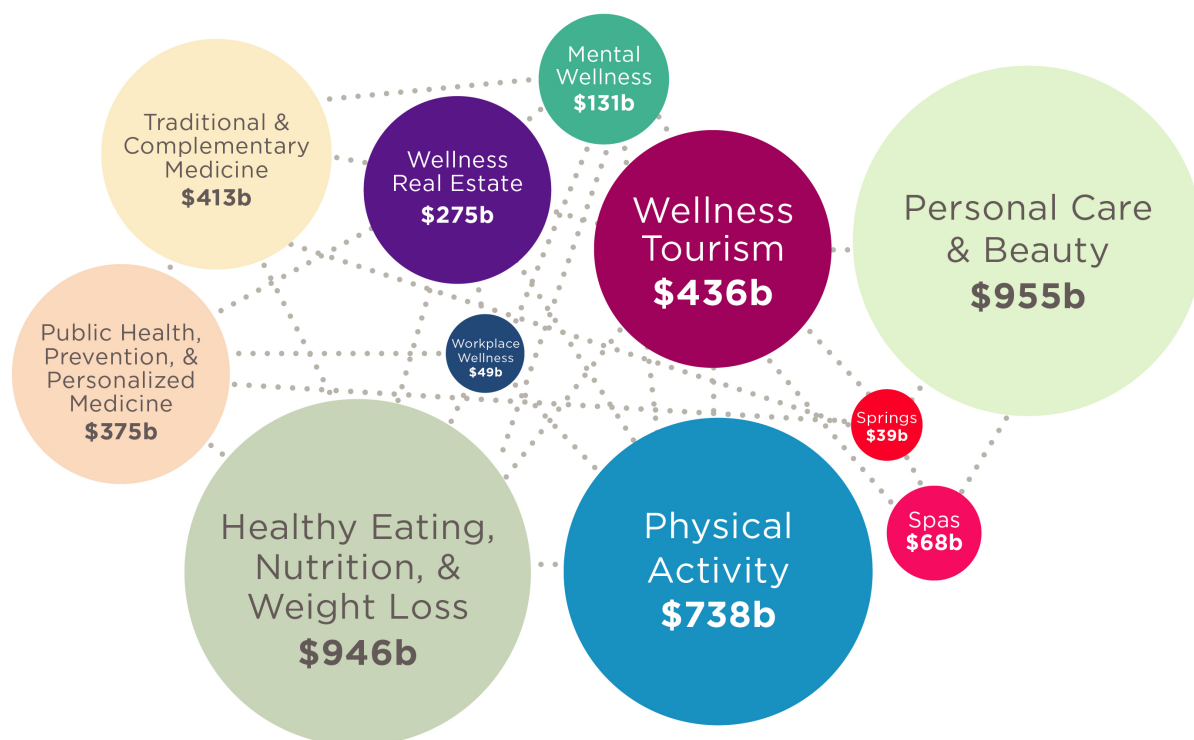
¹ Yeung, O. and Johnston, K. (2021). *The Global Wellness Economy: Looking Beyond COVID*. Miami, FL: Global Wellness Institute. <https://globalwellnessinstitute.org/industry-research/the-global-wellness-economy-looking-beyond-covid/>.

The Global Wellness Institute (GWI) defines wellness as ***the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health***. According to this definition, wellness is not a passive state, but rather an “active pursuit” that is associated with intentions, choices, and actions. Wellness also extends beyond physical health and incorporates many dimensions, including the 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 for 2017 (released in the 2018 *Global Wellness Economy Monitor*). Since then, many major shifts and disruptions have impacted the global wellness economy and its eleven sectors. In particular, the massive economic shock of COVID-19 made 2020 a watershed year that will forever divide history into “before” and “after” the pandemic.

We estimate that the global wellness economy grew from \$4.3 trillion² in 2017 to \$4.9 trillion in 2019, or by 6.6% annually, a growth rate significantly higher than global economic growth (4.0%).³ In 2020, the wellness economy fell by 11.0%, to \$4.4 trillion (while global GDP declined by 2.8%).

GLOBAL WELLNESS ECONOMY: \$4.4 trillion in 2020



Note: Numbers do not add to total due to overlap in sectors.
Source: Global Wellness Institute



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² For more details, see Yeung, O. and Johnston, K. (2021). *The Global Wellness Economy: Looking Beyond Covid*. Miami, FL: Global Wellness Institute. <https://globalwellnessinstitute.org/industry-research/the-global-wellness-economy-looking-beyond-covid/>.

³ Global GDP data from: IMF, *World Economic Outlook Database*, October 2021 Edition, <https://www.imf.org/en/Publications/WEO/weo-database/2021/October>.

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.

For more details on the data presented in this report, including sectoral breakdowns, see the companion GWI report:

***The Global Wellness Economy: Looking Beyond COVID (2021)*,
<https://globalwellnessinstitute.org/industry-research/the-global-wellness-economy-looking-beyond-covid/>**

II. REGIONAL WELLNESS ECONOMY PROFILES

Asia-Pacific is the world's largest wellness economy, and it shrank the least in 2020 as compared to other regions.

In 2020, Asia-Pacific had the largest regional wellness market (\$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.

Asia-Pacific was also one of the fastest-growing wellness markets from 2017-2019 (8.1% annual growth), and it shrank the least during the pandemic (-6.4% from 2019-2020). Asia-Pacific's wellness economy was buffered during COVID-19 by very high growth rates in a couple of key sectors (*wellness real estate* and *public health, prevention, & personalized medicine*), and because it saw a smaller decline than other regions in the *physical activity* and *personal care & beauty* sectors.⁴ In addition, many Asian countries were better able to contain the pandemic and/or had business restrictions that were less severe or more intermittent in 2020.

Other regions did not fare as well in 2020. North America, the fastest-growing wellness region in 2017-2019 (8.4% annual growth), was among the hardest hit by the pandemic (-13.4% from 2019-2020). Europe's wellness economy shrank at a similar rate in 2020 (-11.4%). Latin America-Caribbean's wellness economy declined the most in 2020 (-22.1%) and was already shrinking prior to the pandemic due to market volatility, economic crises, and/or consumer spending downturns in several of the region's largest countries (e.g., Brazil, Mexico, Argentina, Chile, Colombia, Venezuela).

Wellness Economy by Region, 2017, 2019, 2020

	Wellness Economy				Average Annual Growth Rate	
	US\$ billions			Per Capita 2020	2017-2019	2019-2020
	2017*	2019	2020			
Asia-Pacific	\$1,370.5	\$1,602.8	\$1,500.2	\$360	8.1%	-6.4%
North America	\$1,288.1	\$1,514.0	\$1,310.8	\$3,567	8.4%	-13.4%
Europe	\$1,168.3	\$1,288.6	\$1,141.5	\$1,236	5.0%	-11.4%
Latin America-Caribbean	\$311.7	\$302.1	\$235.4	\$360	-1.5%	-22.1%
Middle East-North Africa	\$104.7	\$120.9	\$107.7	\$215	7.4%	-10.9%
Sub-Saharan Africa	\$74.0	\$81.7	\$73.7	\$65	5.1%	-9.8%
WORLD	\$4,317.3	\$4,909.9	\$4,369.3	\$563	6.6%	-11.0%

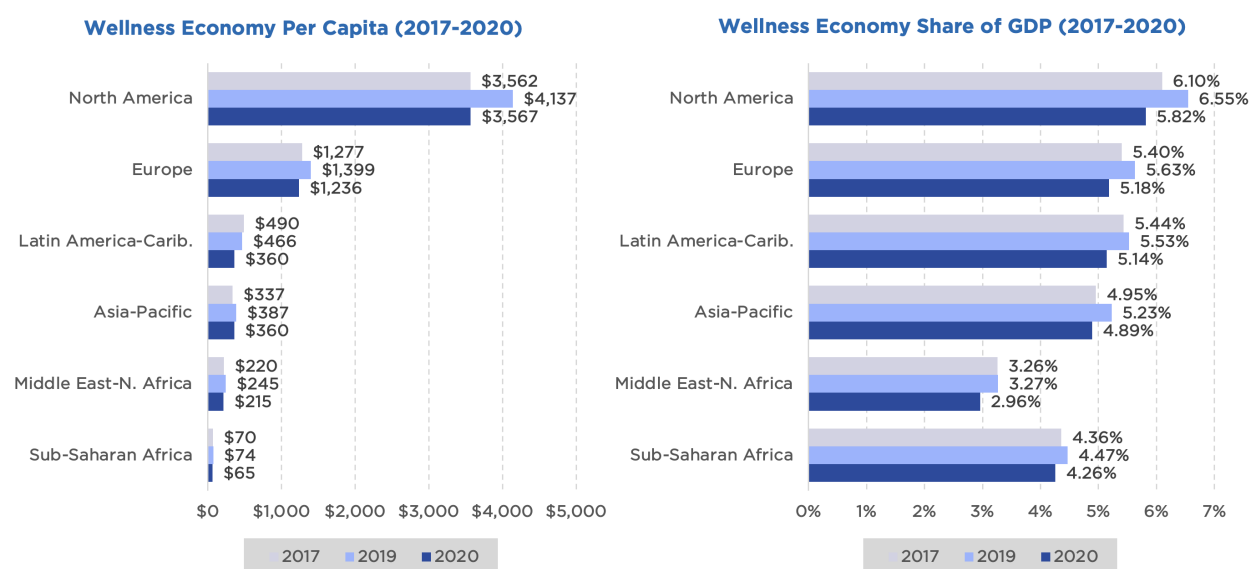
*2017 figures have been revised since GWI released the previous version of the Wellness Economy Monitor. Note: Figures may not sum to total due to rounding. Source: Global Wellness Institute, based on extensive primary research and secondary data sources for 218 countries.

⁴ For detailed data on individual wellness economy sectors by region, see the companion GWI Report: Yeung, O. and Johnston, K. (2021). *The Global Wellness Economy: Looking Beyond Covid*. Miami, FL: Global Wellness Institute. <https://globalwellnessinstitute.org/industry-research/the-global-wellness-economy-looking-beyond-covid/>.

North Americans and Europeans spend the most on wellness on a per capita basis.

Per capita spending on wellness is significantly higher in North America (\$3,567) and Europe (\$1,236) than in other regions of the world, reflecting both the level of wealth and the overall development of the wellness economy in these two regions.⁵ Per capita spending on wellness peaked in 2019 and then declined in 2020 across the board.⁶

Globally, the wellness economy represented about 5.14% of total GDP in 2020.⁷ The ratio of regional wellness industry size to GDP was in a similar range across North America (5.8%), Europe (5.2%), and Latin America-Caribbean (5.1%); it was slightly lower in Asia-Pacific (4.9%) and Sub-Saharan Africa (4.3%) and was the lowest in the Middle East-North Africa region (3.0%). Wellness economy as a share of GDP fell in all regions in 2020, reflecting the reality that many wellness sectors were harder hit by the pandemic than the overall economy.



Source: Global Wellness Institute, World Bank (population data), and IMF (GDP data)

The following pages present the wellness economy profile for each of the six regions.

⁵ Note that the wellness economy figures include expenditures by inbound wellness tourists, and so not all of the per capita spending in each region is from the residents within that region.

⁶ The exception is Latin America, where per capita spending on wellness has been on the decline since 2017.

⁷ 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: Wellness Economy Profile

	2017	2019	2020
Wellness Economy (US\$ billions)	\$1,370.5	\$1,602.8	\$1,500.2
Wellness Economy Per Capita (US\$)	\$337	\$387	\$360
Wellness Economy as a % of Regional GDP	4.95%	5.23%	4.89%
Wellness Economy as a % of Global Total	32%	33%	34%

Note: Figures for the eleven sectors shown below do not sum to the regional total due to overlap in sectors.

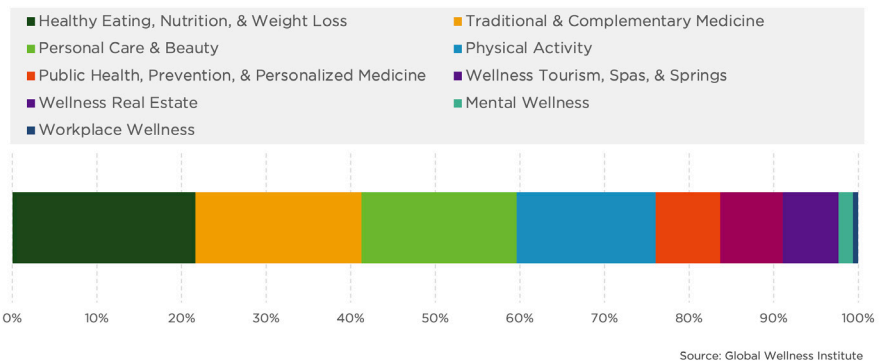
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 45 markets in Asia-Pacific); IMF World Economic Outlook, October 2021 Edition (GDP data); World Bank World Development Indicators (population data).

Wellness Economy: Top 10 Markets in Asia-Pacific (2020)

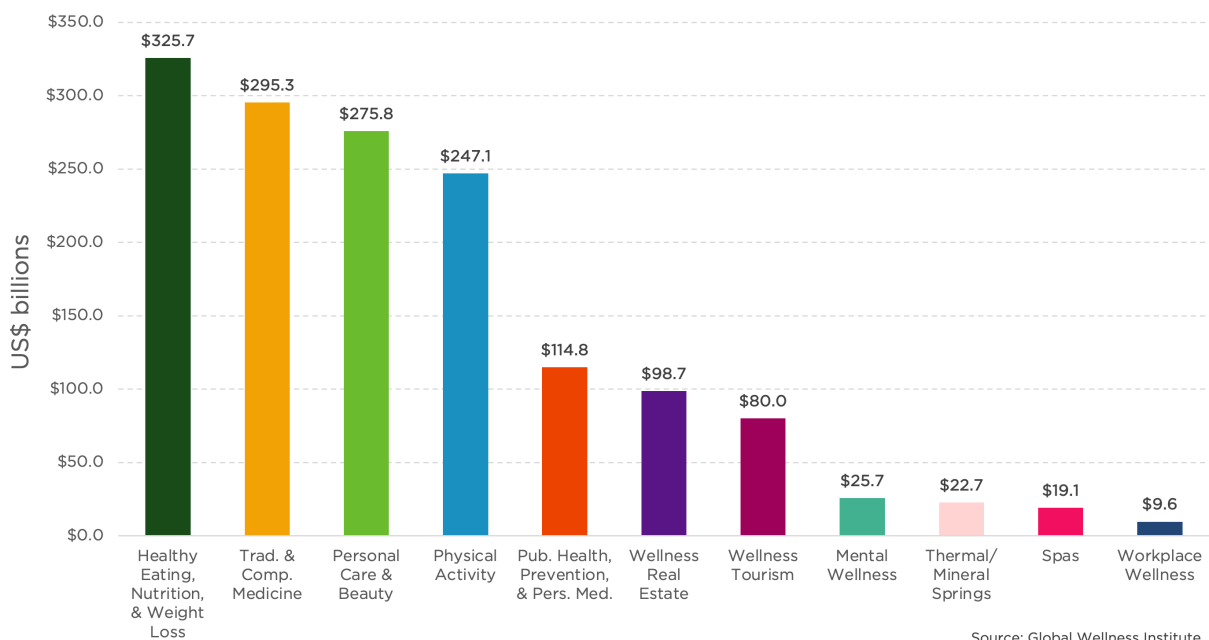
	US\$ billions
China	\$682.7
Japan	\$303.6
South Korea	\$94.1
Australia	\$84.4
India	\$77.6
Taiwan	\$38.4
Indonesia	\$36.4
Philippines	\$33.0
Thailand	\$29.0
Malaysia	\$24.4

Source: GWI

Asia-Pacific: Composition of the Wellness Economy (2020)



Asia-Pacific: Wellness Economy Sectors (2020)



Europe: Wellness Economy Profile

	2017	2019	2020
Wellness Economy (US\$ billions)	\$1,168.3	\$1,288.6	\$1,141.5
Wellness Economy Per Capita (US\$)	\$1,277	\$1,399	\$1,236
Wellness Economy as a % of Regional GDP	5.40%	5.63%	5.18%
Wellness Economy as a % of Global Total	27%	26%	26%

Note: Figures for the eleven sectors shown below do not sum to the regional total due to overlap in sectors.

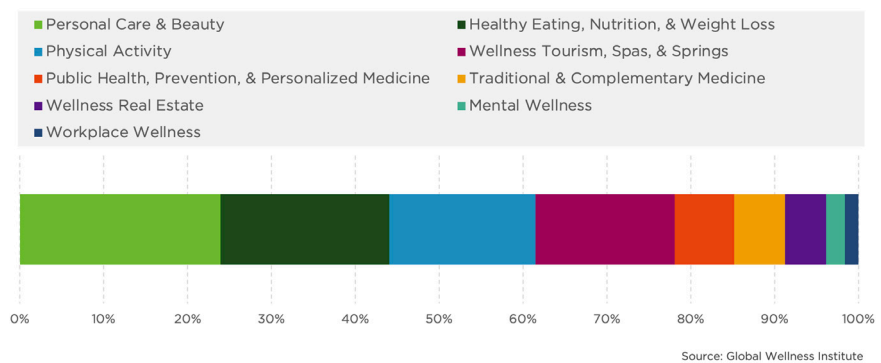
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 55 markets in Europe); IMF World Economic Outlook, October 2021 Edition (GDP data); World Bank World Development Indicators (population data).

Wellness Economy: Top 10 Markets in Europe (2020)

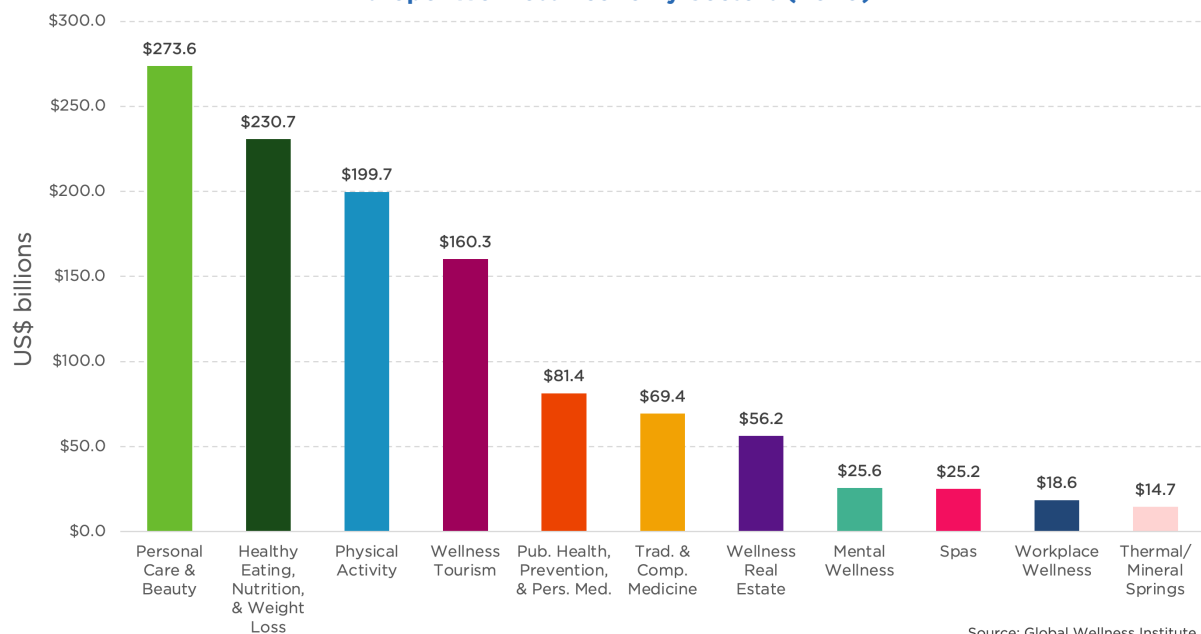
	US\$ billions
Germany	\$223.9
UK	\$158.4
France	\$133.1
Italy	\$91.8
Russia	\$71.4
Spain	\$62.6
Netherlands	\$41.0
Switzerland	\$38.2
Turkey	\$34.6
Austria	\$32.2

Source: GWI

Europe: Composition of the Wellness Economy (2020)



Europe: Wellness Economy Sectors (2020)



Latin America-Caribbean: Wellness Economy Profile

	2017	2019	2020
Wellness Economy (US\$ billions)	\$311.7	\$302.1	\$235.4
Wellness Economy Per Capita (US\$)	\$490	\$466	\$360
Wellness Economy as a % of Regional GDP	5.4%	5.5%	5.1%
Wellness Economy as a % of Global Total	7%	6%	5%

Note: Figures for the eleven sectors shown below do not sum to the regional total due to overlap in sectors.

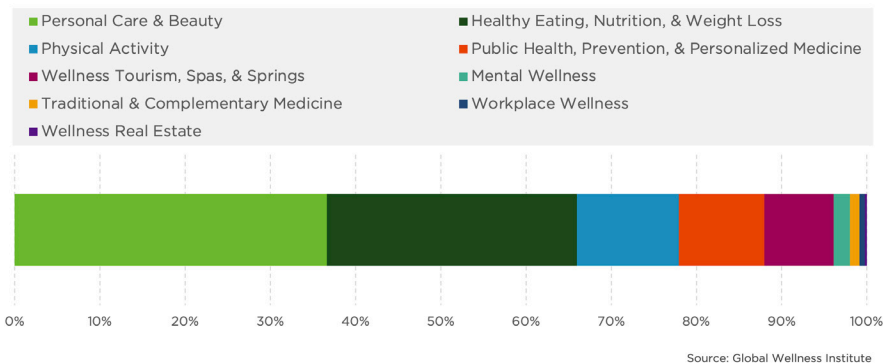
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 46 markets in Latin America-Carib.); IMF World Economic Outlook, October 2021 Edition (GDP data); World Bank World Development Indicators (population data).

Wellness Economy: Top 10 Markets in Latin America- Caribbean (2020)

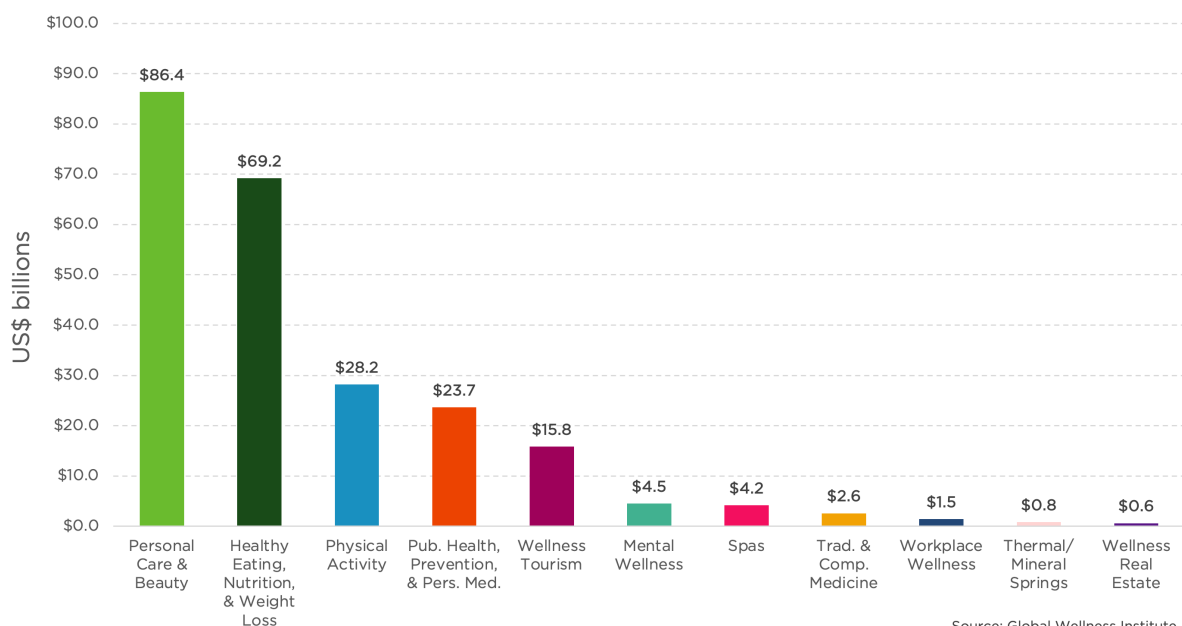
	US\$ billions
Brazil	\$82.6
Mexico	\$46.5
Argentina	\$17.1
Chile	\$13.3
Peru	\$13.1
Colombia	\$11.6
Costa Rica	\$7.2
Ecuador	\$7.2
Panama	\$5.0
Puerto Rico	\$3.8

Source: GWI

Latin America-Caribbean: Composition of the Wellness Economy (2020)



Latin America-Caribbean: Wellness Economy Sectors (2020)



Middle East-North Africa: Wellness Economy Profile

	2017	2019	2020
Wellness Economy (US\$ billions)	\$104.7	\$120.9	\$107.7
Wellness Economy Per Capita (US\$)	\$220	\$245	\$215
Wellness Economy as a % of Regional GDP	3.26%	3.27%	2.96%
Wellness Economy as a % of Global Total	2%	2%	2%

Note: Figures for the eleven sectors shown below do not sum to the regional total due to overlap in sectors.

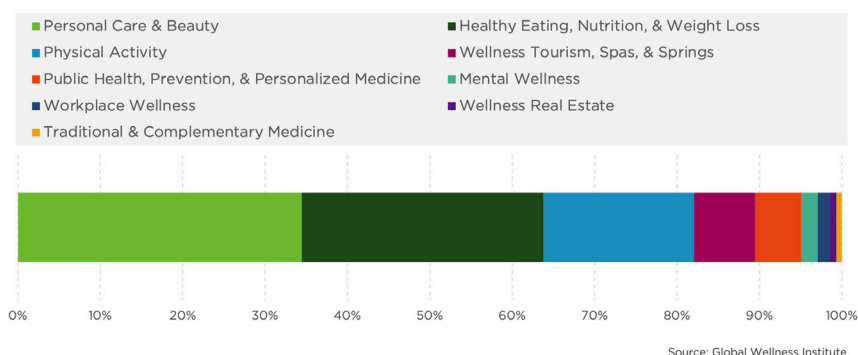
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 20 markets in Middle East-North Africa); IMF World Economic Outlook, October 2021 Edition (GDP data); World Bank World Development Indicators (population data).

Wellness Economy: Top 10 Markets in Middle East-North Africa (2020)

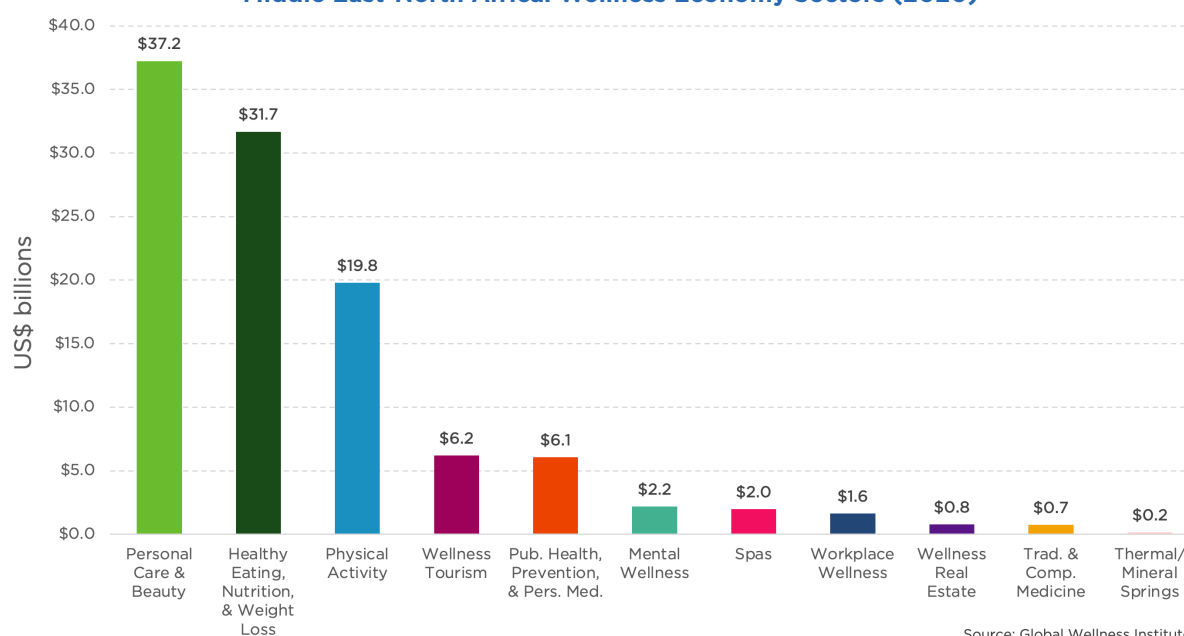
	US\$ billions
Saudi Arabia	\$15.2
Israel	\$14.2
UAE	\$13.9
Egypt	\$12.0
Iran	\$11.9
Algeria	\$6.4
Kuwait	\$5.9
Morocco	\$5.5
Oman	\$2.8
Tunisia	\$2.8

Source: GWI

Middle East-North Africa: Composition of the Wellness Economy (2020)



Middle East-North Africa: Wellness Economy Sectors (2020)



North America: Wellness Economy Profile

	2017	2019	2020
Wellness Economy (US\$ billions)	\$1,288.1	\$1,514.0	\$1,310.8
Wellness Economy Per Capita (US\$)	\$3,562	\$4,137	\$3,567
Wellness Economy as a % of Regional GDP	6.10%	6.55%	5.82%
Wellness Economy as a % of Global Total	30%	31%	30%

Note: Figures for the eleven sectors shown below do not sum to the regional total due to overlap in sectors.

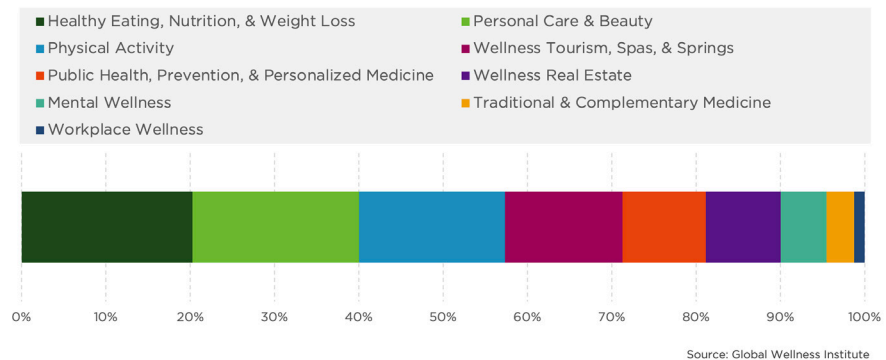
Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, October 2021 Edition (GDP data); World Bank World Development Indicators (population data).

Wellness Economy: Markets in North America (2020)

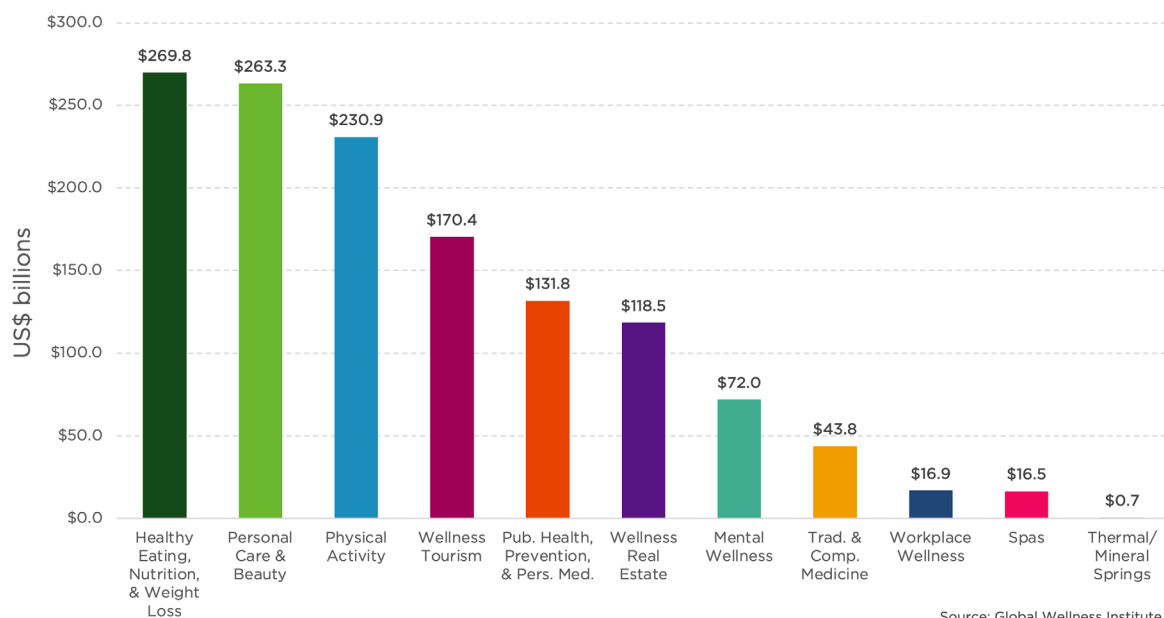
	US\$ billions
United States	\$1,215.7
Canada	\$95.1

Source: GWI

North America: Composition of the Wellness Economy (2020)



North America: Wellness Economy Sectors (2020)



Sub-Saharan Africa: Wellness Economy Profile

	2017	2019	2020
Wellness Economy (US\$ billions)	\$74.0	\$81.7	\$73.7
Wellness Economy Per Capita (US\$)	\$70	\$74	\$65
Wellness Economy as a % of Regional GDP	4.36%	4.47%	4.26%
Wellness Economy as a % of Global Total	2%	2%	2%

Note: Figures for the eleven sectors shown below do not sum to the regional total due to overlap in sectors.

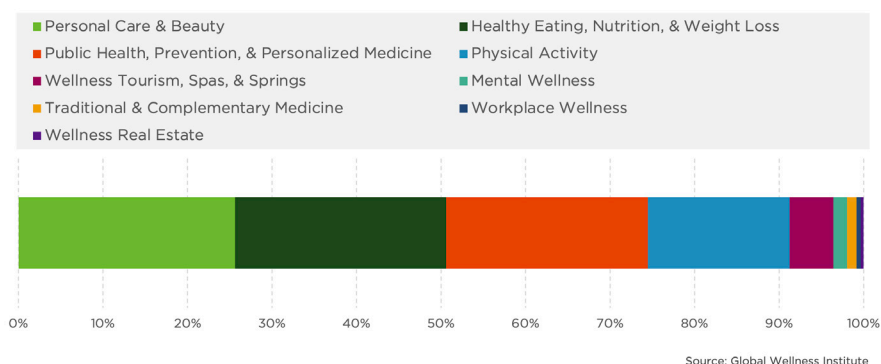
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 50 markets in Sub-Saharan Africa); IMF World Economic Outlook, October 2021 Edition (GDP data); World Bank World Development Indicators (population data).

Wellness Economy: Top 10 Markets in Sub-Saharan Africa (2020)

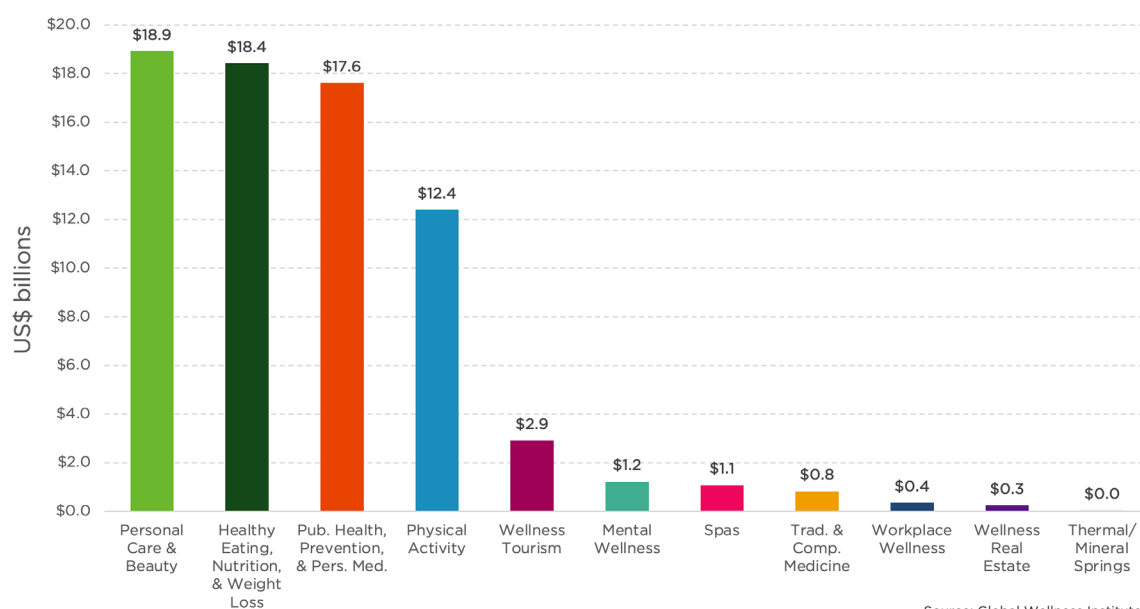
	US\$ billions
South Africa	\$21.7
Nigeria	\$11.4
Kenya	\$5.9
Ethiopia	\$3.1
Ghana	\$2.4
Uganda	\$2.1
Angola	\$1.9
Zimbabwe	\$1.9
Cote d'Ivoire	\$1.9
Tanzania	\$1.8

Source: GWI

Sub-Saharan Africa: Composition of the Wellness Economy (2020)



Sub-Saharan Africa: Wellness Economy Sectors (2020)



III. COUNTRY RANKINGS AND ANALYSIS

The top five wellness economies are the United States, China, Japan, Germany, and the United Kingdom.

Asia-Pacific, North America, and Europe together account for 90% of the global wellness economy, and all but two (Brazil and Mexico) of the twenty largest wellness markets are located in those regions. The United States is by far the largest market, at \$1.2 trillion in 2020 – nearly double the size of the second-largest market (China, at \$683 billion). In fact, the United States accounts for 28% of the entire global wellness economy in 2020. The top ten markets represent 71% of the global total.

All but one (Netherlands) of the twenty largest markets saw a decline in wellness spending during the pandemic (2019-2020). The middle-/high-income Asian markets generally had the smallest declines, while the large Latin American countries were hit hardest. As noted above, many Asian markets had pandemic business restrictions that were less severe or more intermittent than elsewhere, and therefore their wellness sectors suffered less shrinkage in 2020.

Wellness Economy: Top Twenty Markets in 2020

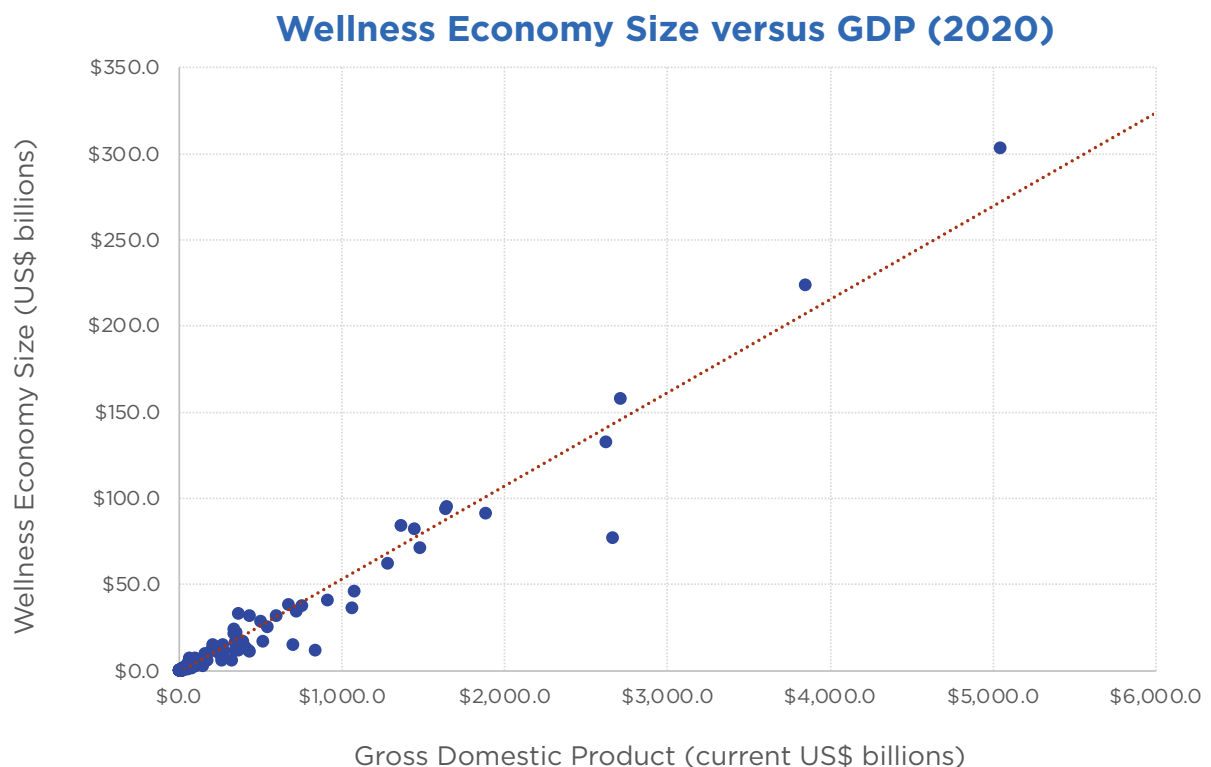
	Wellness Economy Size				Average Annual Growth Rate	
	US\$ billions			Rank in 2020	2017-2019	2019-2020
	2017*	2019	2020			
United States	\$1,198.1	\$1,409.7	\$1,215.7	1	8.5%	-13.8%
China	\$583.2	\$700.2	\$682.7	2	9.6%	-2.5%
Japan	\$288.6	\$323.0	\$303.6	3	5.8%	-6.0%
Germany	\$224.4	\$244.4	\$223.9	4	4.4%	-8.4%
United Kingdom	\$149.6	\$167.8	\$158.4	5	5.9%	-5.6%
France	\$136.9	\$150.5	\$133.1	6	4.8%	-11.6%
Canada	\$90.0	\$104.2	\$95.1	7	7.6%	-8.8%
South Korea	\$90.0	\$101.8	\$94.1	8	6.4%	-7.5%
Italy	\$100.9	\$107.5	\$91.8	9	3.2%	-14.5%
Australia	\$81.3	\$91.0	\$84.4	10	5.8%	-7.3%
Brazil	\$122.9	\$112.6	\$82.6	11	-4.3%	-26.6%
India	\$69.9	\$87.3	\$77.6	12	11.8%	-11.2%
Russia	\$78.6	\$86.8	\$71.4	13	5.1%	-17.7%
Spain	\$69.9	\$74.9	\$62.6	14	3.5%	-16.4%
Mexico	\$52.9	\$60.4	\$46.5	15	6.8%	-23.1%
Netherlands	\$36.4	\$40.3	\$41.0	16	5.2%	1.7%
Taiwan	\$36.8	\$39.1	\$38.4	17	3.0%	-1.8%
Switzerland	\$39.6	\$44.6	\$38.2	18	6.2%	-14.4%
Indonesia	\$34.9	\$40.6	\$36.4	19	7.9%	-10.3%
Turkey	\$39.4	\$39.9	\$34.6	20	0.6%	-13.4%

2017 figures have been revised since GWI released the previous version of the Wellness Economy Monitor. See **Table 1 for detailed time series data for 150 countries. Source: Global Wellness Institute, based on extensive primary research and secondary data sources.*

The size of each country's wellness market is generally proportionate to the size of its overall economy.

It is no surprise that the world's largest wellness markets are located in the largest economies as measured by GDP (see table on Page 14). All but one of the top twenty wellness economies also rank in the top twenty for GDP. The scatterplot chart further illustrates the clear, linear relationship between wellness economy size and GDP across 150 markets – i.e., the larger the economy, the larger its wellness market.

Similar to other major industries, the wellness economy is linked to the size and wealth of the population – see table on Page 14, which displays rankings by population size and by GDP per capita (a standard proxy measure of “wealth”). The largest wellness economies are either among the world's most populous countries (e.g., China, India, Indonesia, Brazil, Russia), or the wealthiest (e.g., Switzerland, Australia, Netherlands), or in countries that combine size with wealth (e.g., United States, Japan, Germany, United Kingdom, etc.).



Note that two outliers for GDP and Wellness Economy (United States and China) were removed from this scatterplot to improve visibility of data trends. Source: Global Wellness Institute and IMF (GDP data), based on data from 150 countries.

Wellness Economy and Size/Wealth Comparisons: Top Twenty Markets, 2020

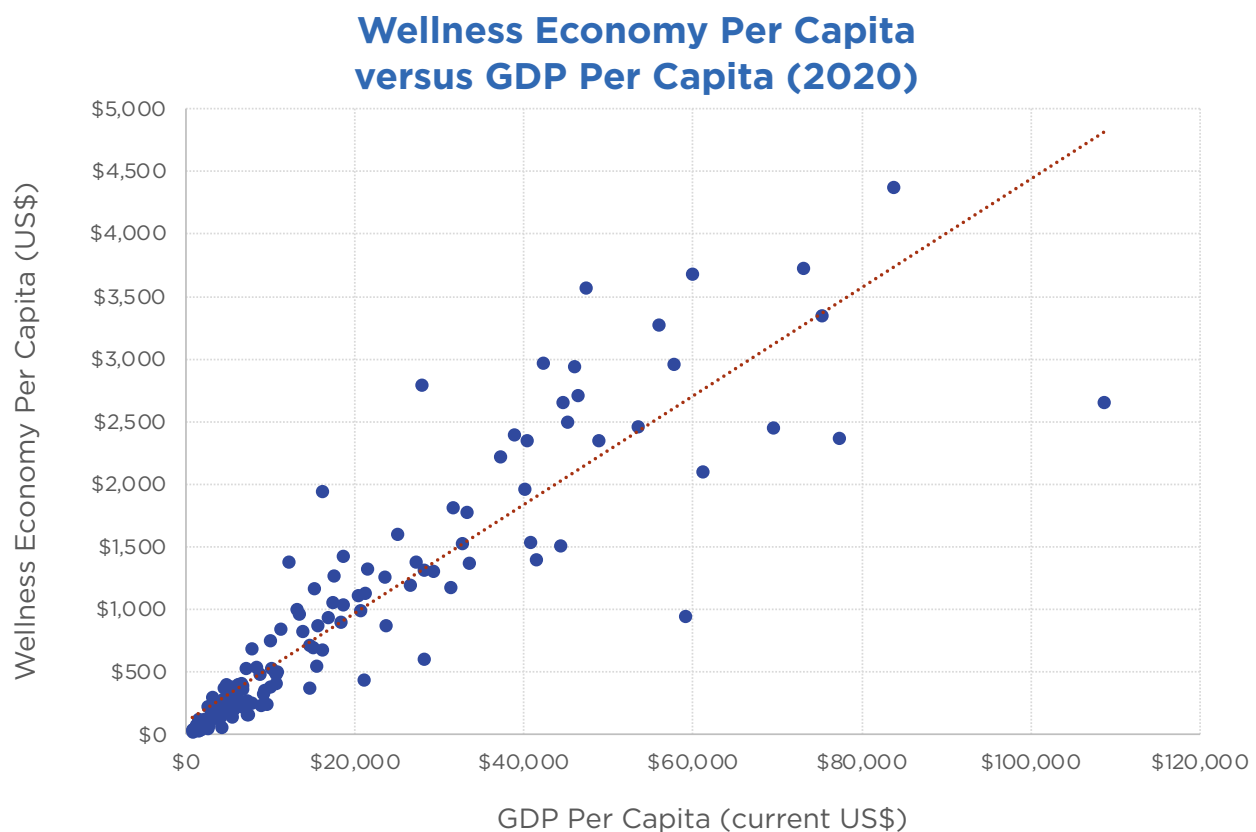
	Wellness Economy Size		Gross Domestic Product (GDP)		Population		GDP Per Capita	
	US\$ billions	Rank	US\$ billions	Rank	millions	Rank	Current US\$	Rank
United States	\$1,215.7	1	\$20,893.8	1	329.5	3	\$59,886	8
China	\$682.7	2	\$14,866.7	2	1,402.1	1	\$8,760	76
Japan	\$303.6	3	\$5,045.1	3	125.8	11	\$38,903	25
Germany	\$223.9	4	\$3,843.3	4	83.2	18	\$44,637	18
United Kingdom	\$158.4	5	\$2,709.7	5	67.2	21	\$40,350	23
France	\$133.1	6	\$2,624.4	7	67.4	20	\$40,054	24
Canada	\$95.1	7	\$1,644.0	9	38.0	34	\$45,192	17
South Korea	\$94.1	8	\$1,638.3	10	51.8	27	\$31,601	30
Italy	\$91.8	9	\$1,884.9	8	59.6	23	\$32,649	29
Australia	\$84.4	10	\$1,359.4	13	25.7	46	\$55,915	11
Brazil	\$82.6	11	\$1,444.7	12	212.6	6	\$9,978	70
India	\$77.6	12	\$2,660.2	6	1,380.0	2	\$1,981	128
Russia	\$71.4	13	\$1,478.6	11	144.1	9	\$10,724	66
Spain	\$62.6	14	\$1,280.5	14	47.4	29	\$28,197	34
Mexico	\$46.5	15	\$1,073.9	15	128.9	10	\$9,343	73
Netherlands	\$41.0	16	\$913.1	17	17.4	54	\$48,800	13
Taiwan	\$38.4	17	\$668.2	22	23.8	47	\$25,062	38
Switzerland	\$38.2	18	\$751.9	19	8.6	78	\$83,700	2
Indonesia	\$36.4	19	\$1,059.6	16	273.5	4	\$3,885	108
Turkey	\$34.6	20	\$719.9	20	84.3	16	\$10,629	67

Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, October 2021 Edition (GDP data); World Bank World Development Indicators (population data).

Per capita spending on wellness is highest in wealthy countries: Switzerland, Iceland, United States, Austria, and Norway.

The wellness economy is driven by consumers with ample disposable incomes, who are both willing *and* able to spend money on discretionary products and services like fitness, meditation, vitamins and supplements, self-help, beauty and personal care, and so on. The scatterplot chart to the right illustrates the clear, positive relationship between wellness consumption (represented by wellness economy per capita) and consumer wealth (represented by GDP per capita).⁸

As illustrated by both the scatterplot chart and the table below (Page 16), per capita spending on wellness is highest in very wealthy countries: Switzerland, Iceland, United States, Austria, and Norway. Nearly all of the top markets for wellness spending per capita also rank in the top 20 globally for GDP per capita.



Source: Global Wellness Institute, IMF (GDP data), and World Bank (Population data), based on data from 150 countries.

⁸ Note that the wellness economy figures include expenditures by inbound wellness tourists, and so not all of the per capita spending in each country is from the residents within that country. See Page 17 for more explanation.

Wellness Economy and GDP Per Capita: Top Twenty Markets, 2020

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Switzerland	\$4,372	1	\$83,700	2
Iceland	\$3,728	2	\$73,085	5
United States	\$3,685	3	\$59,886	8
Austria	\$3,568	4	\$47,318	14
Norway	\$3,346	5	\$75,307	4
Australia	\$3,271	6	\$55,915	11
New Zealand	\$2,969	7	\$42,335	20
Denmark	\$2,958	8	\$57,773	10
Hong Kong	\$2,943	9	\$46,032	16
Aruba	\$2,792	10	\$27,897	35
Finland	\$2,707	11	\$46,437	15
Luxembourg	\$2,658	12	\$108,622	1
Germany	\$2,651	13	\$44,637	18
Canada	\$2,498	14	\$45,192	17
Sweden	\$2,464	15	\$53,459	12
Ireland	\$2,448	16	\$69,487	6
Japan	\$2,396	17	\$38,903	25
Macau	\$2,365	18	\$77,257	3
United Kingdom	\$2,350	19	\$40,350	23
Netherlands	\$2,348	20	\$48,800	13

See **Table 2** for detailed time series data on wellness economy per capita in 150 countries.

Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, October 2021 Edition (GDP data).

Tourism can skew comparisons of wellness spending across different markets.

It may be surprising to see Aruba and Seychelles appear among the top countries for wellness economy per capita (see table on Page 16 and *Table 2* at the end of the report) because they are not especially “wealthy” countries as compared to the others on this list. It is important to keep in mind that not all of the wellness spending in each country is done by residents of that country. Some wellness economy sectors, like wellness tourism, include spending by tourists. In fact, 27% of all wellness tourism expenditures are from inbound travelers; likewise, a significant portion of the revenues in thermal/mineral springs and some types of spas come from international visitors. In small island economies like Seychelles and Aruba, tourism can really skew the data on wellness spending per capita. In these countries, most of the per capita wellness spending comes from inbound tourists; therefore, the high per capita spending figures reflect a robust wellness tourism market, but not necessarily a well-developed or diversified wellness market among local residents.

Other countries topping the list for wellness spending per capita (Switzerland, Iceland, United States, Austria, etc.) have large international and domestic tourism markets, served by a well-developed range of wellness businesses (spas, hot springs, wellness resorts, etc.). The large wellness economies and high per capita spending levels in these countries reflect a substantial domestic consumer market for wellness products and services, bolstered by high spending by inbound wellness tourists.

When we rank countries by the ratio of their wellness economy to the size of their GDP, the small, tourism-dependent economies stand out once again (see table below, or *Table 3* at the end of the report). Among the top five countries, the wellness economy represents more than 9.5% of GDP; in four of these countries (Seychelles, Maldives, Aruba, and St. Lucia), tourism also makes up a substantial share of the economy (more than 20%). By comparison, tourism spending represented just 3.2% of GDP globally in 2020.⁹

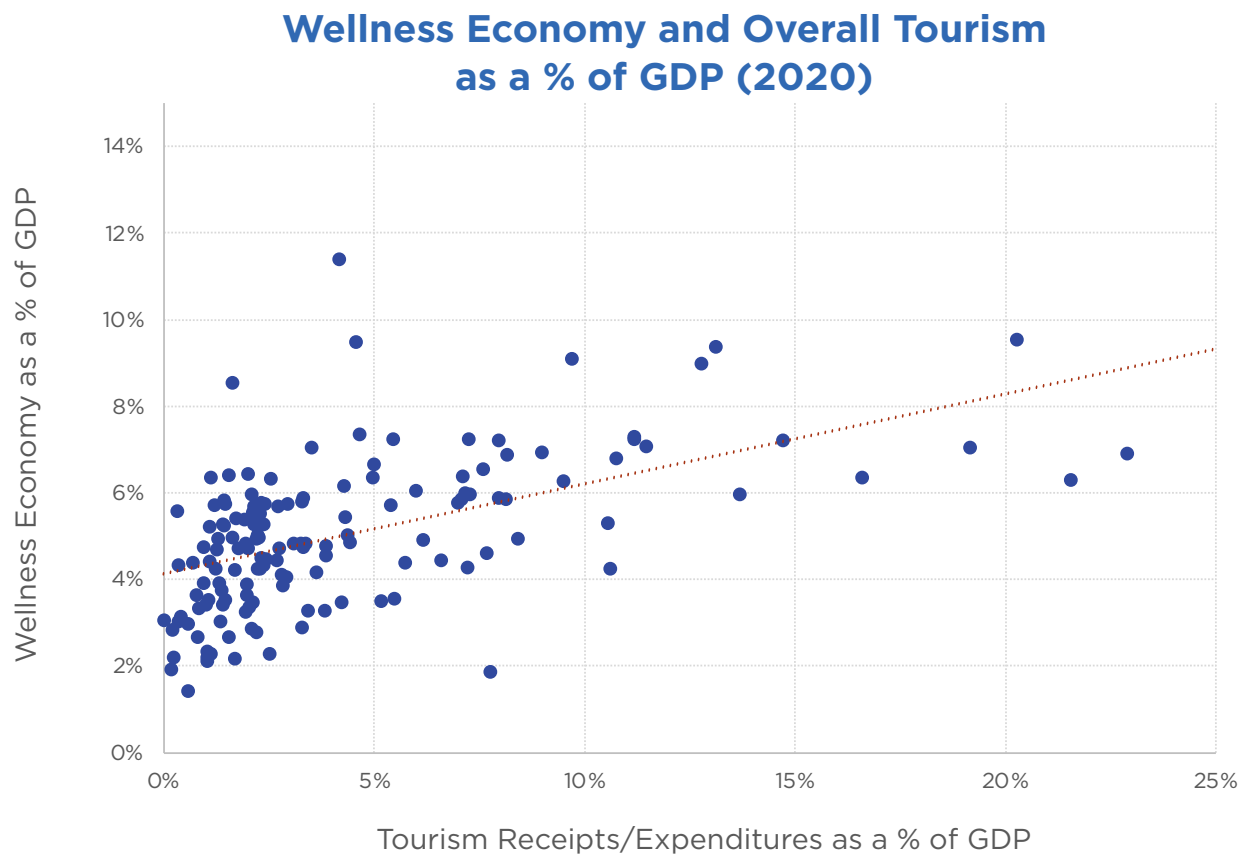
Wellness Economy and Tourism as a % of GDP: Top Five Markets, 2020

	Wellness Economy as a % of GDP		Overall Tourism as a % of GDP	
	% of GDP	Rank	% of GDP	Rank
Seychelles	16.8%	1	28.3%	3
Maldives	14.5%	2	55.9%	1
Aruba	11.9%	3	50.1%	2
Costa Rica	11.4%	4	4.2%	54
St. Lucia	9.6%	5	20.3%	6

See *Table 3* for detailed time series data on wellness economy as a % of GDP in 150 countries. Tourism figures include international/inbound and domestic trip expenditures. Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, October 2021 Edition (GDP data); Euromonitor (tourism data).

⁹Based on tourism data from Euromonitor (accessed in Fall 2021) and GDP data from the IMF *World Economic Outlook* (October 2021 edition). Note that tourism expenditures shrank significantly in 2020 due to the pandemic, and so tourism represented a smaller share of GDP in 2020, both globally and within individual countries, than it typically would. For comparison, tourism spending represented 5.4% of global GDP in 2019.

In many tourism-dependent countries, the tourism industry has evolved to develop and emphasize its wellness offerings in order to attract high-end international tourists and capture their spending. Therefore, wellness tourism is a large contributor to GDP, and the wellness economies in these countries are relatively large when compared to less tourism-dependent countries of a similar size. The scatterplot chart to the right illustrates the clear, positive relationship between the size of the wellness industry and the tourism industry when they are measured against the overall economy.

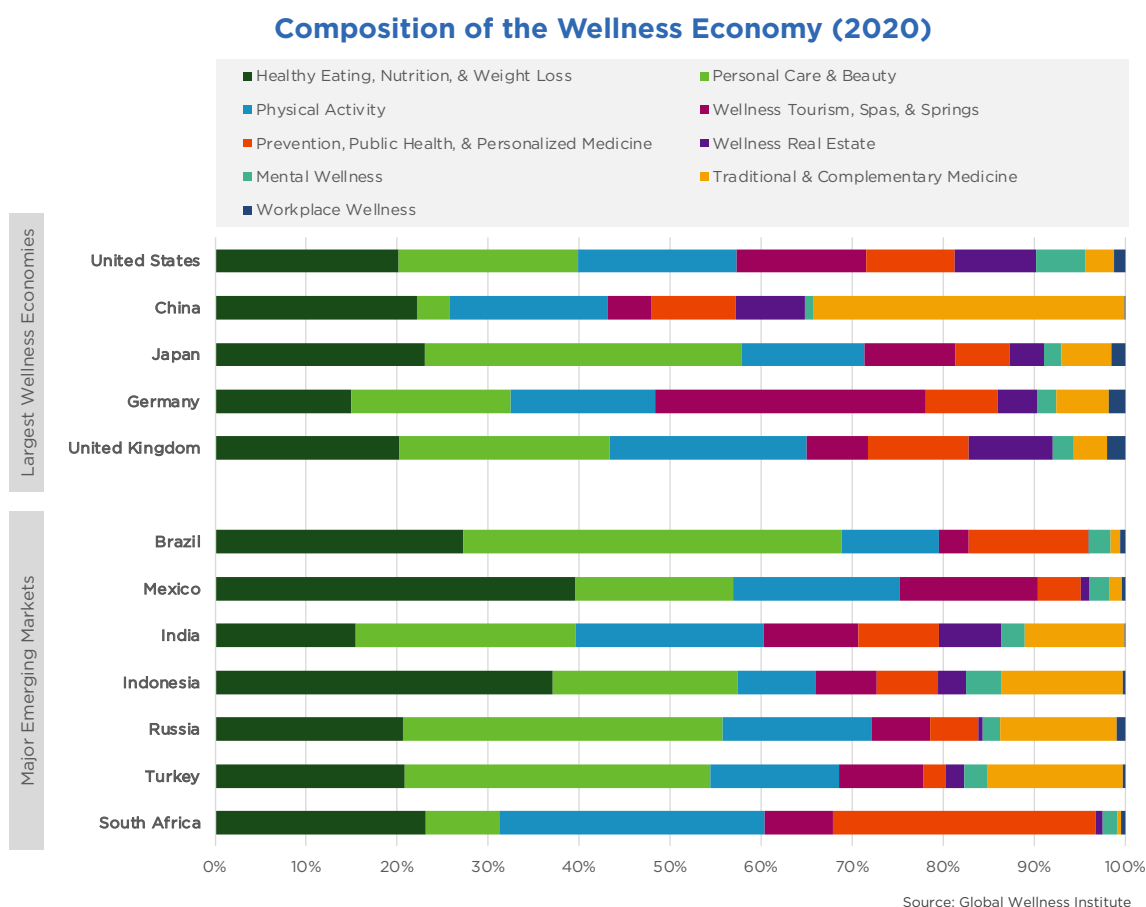


Note that three outliers for tourism (Maldives, Aruba, Seychelles) were removed from this scatterplot to improve visibility of data trends. Source: Global Wellness Institute, IMF (GDP data), and Euromonitor (tourism data), based on data from 150 countries.

The composition of the wellness economy differs dramatically across countries.

Industries develop differently in different countries, depending on their historical, cultural, and socioeconomic development contexts, and this is especially true for wellness. The wellness economy, as defined by GWI, is broad and diverse. Its eleven sectors encompass many different types of consumer activities and expenditures, including products, services, travel, and technology. The level of development and contribution of each wellness sector to the overall wellness economy vary across different countries around the world.

The chart below shows the distribution of the wellness sectors in the world's five largest wellness economies and in seven major emerging markets.¹⁰ Focusing on the five largest wellness economies (the top portion of the chart), it is clear that consumers have diverse priorities when it comes to their wellness expenditures. In the United States and United Kingdom, wellness spending is somewhat evenly distributed across many of the largest sectors (*healthy eating, personal care & beauty, physical activity, prevention & public health, etc.*). In Japan, *personal care & beauty* represents a much larger than average share of overall wellness spending. In China, *traditional & complementary medicine* is a very large portion of the market (due to the prevalence and long history of Traditional Chinese Medicine), while *personal care & beauty* is significantly smaller. In Germany, *wellness tourism, spas, and thermal/mineral springs* are much larger players in the wellness economy.



¹⁰ For this chart (and for those on the following pages) we have combined three wellness sectors (wellness tourism, spas, and thermal/mineral springs) because of their overlap, in order to reduce "double-counting" and to avoid overstating their size relative to the other wellness sectors.

The wellness economy composition in the major emerging market countries (the lower portion of the chart above) shows similar variations. In Brazil, *personal care & beauty* is the dominant sector in the wellness economy, while in Mexico and Indonesia, the *healthy eating* sector is much larger than average. India, Indonesia, Russia, and Turkey all have sizable *traditional & complementary medicine* sectors. South Africa has a very small *personal care & beauty* sector, but a large amount of spending on *prevention & public health*.

Healthy eating, physical activity, and personal care and beauty form the bulk of the wellness market in most countries.

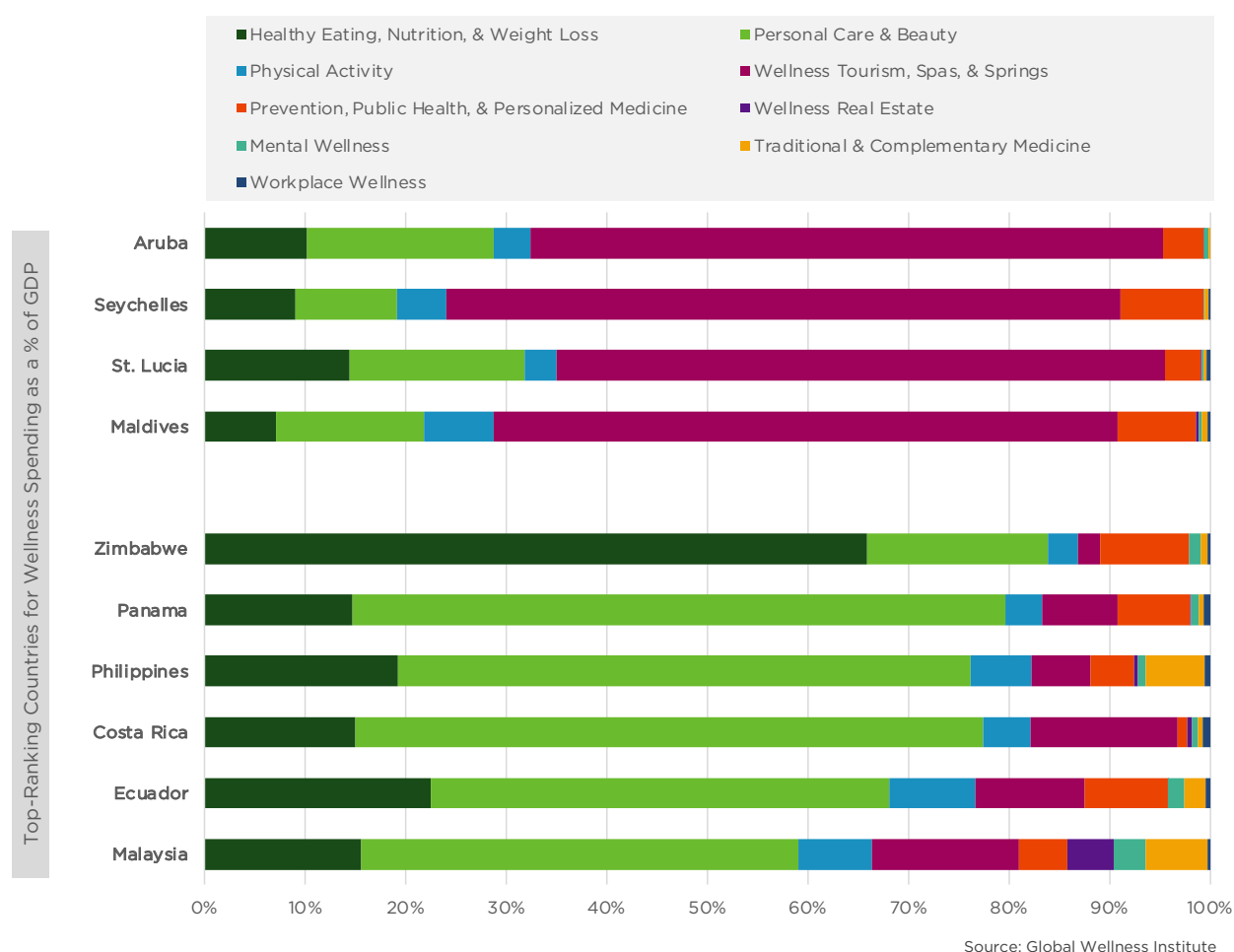
Both worldwide and in most countries, the majority of the wellness economy is concentrated in three sectors – *healthy eating, nutrition, & weight loss*; *personal care & beauty*; and *physical activity*. Globally, these three sectors account for over 60% of the wellness economy, and they account for over 50% of the wellness economy in 189 of the 218 countries measured by GWI. This is especially true in the large middle-income and high-income countries, where tourism does not dominate the economy (see chart above). Some exceptions to this pattern are China and Germany (as shown in the chart above) and a number of countries where wellness tourism is the primary driver of the wellness economy (see chart on Page 21).

In some countries wellness is an export industry, while in others it is primarily an import industry.

The chart below highlights countries where the wellness economy is very large relative to GDP (over 7%), and it is clear that wellness spending contributes to the local economy in very different ways. In the set of countries presented in the top portion of the chart (Aruba, Seychelles, etc.), *wellness tourism* and *spas* together are by far the dominant sectors in their wellness economies. As noted on Page 17, these countries' economies are heavily dependent on inbound tourism, and wellness is a major part of their tourism offerings. In these countries, the wellness economy is dominated by services, and wellness is primarily an export industry – contributing significant foreign exchange earnings and creating jobs in the local economy.

Among the countries shown in the lower portion of the chart below, the wellness economy is dominated by spending on *healthy eating* and *personal care & beauty*. These countries may have stronger than average consumer demand and purchases in *healthy eating* and *personal care & beauty*. At the same time, personal care, beauty, and food products are typically imported in low- and middle-income countries, and so the high spending in these sectors may be due to high import prices (especially during the pandemic year) and weak local currencies, and not necessarily greater consumer demand. In these markets, wellness is primarily an import industry, and consumer wellness spending is mostly on products rather than services.

Composition of the Wellness Economy (2020)

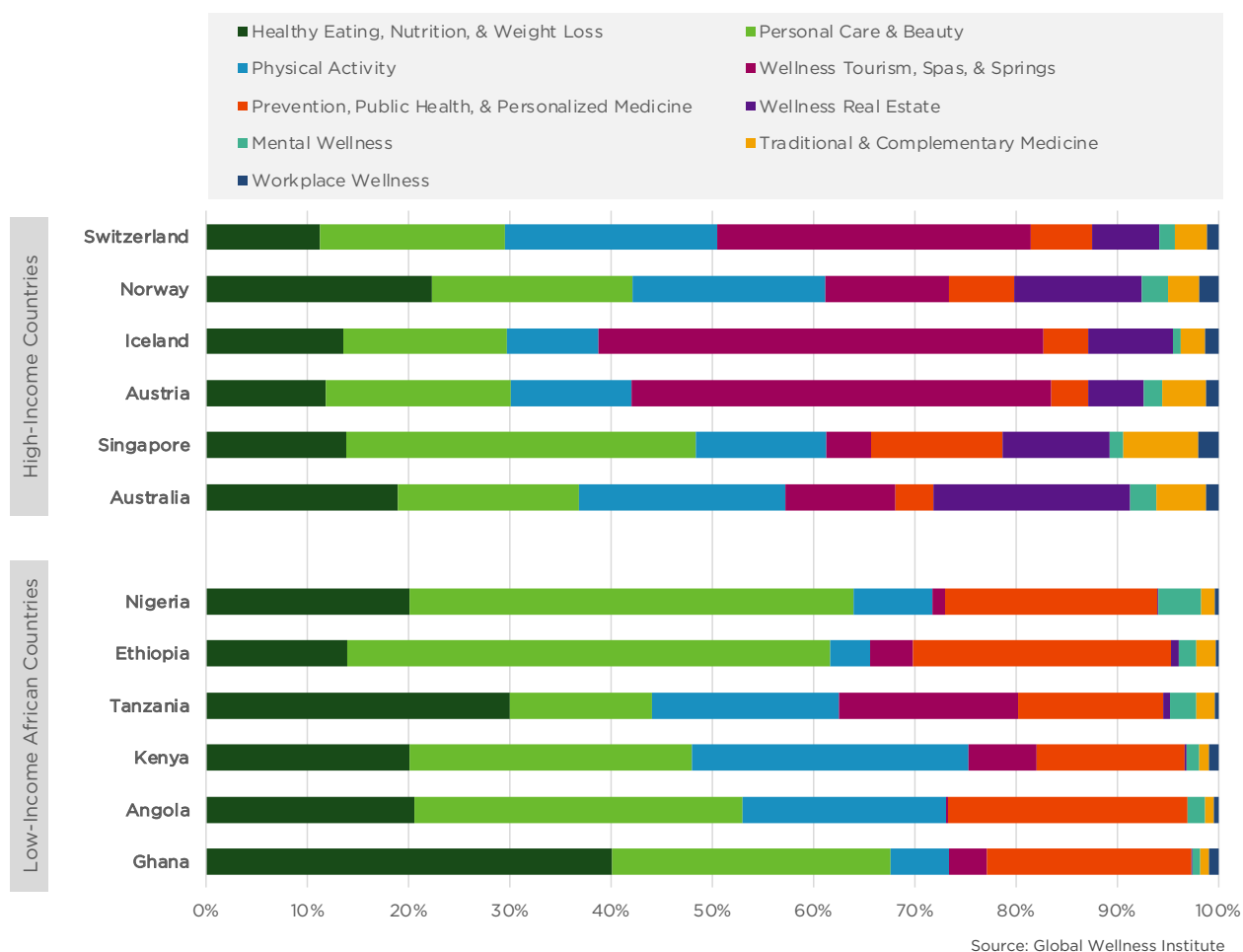


Higher-income countries tend to have more diversified wellness economies than lower-income countries.

The chart below compares the wellness economies in a selection of high-income countries (in Europe and Asia) and a selection of large, low-income countries (in Africa). Among the wealthy countries (presented in the top section of the chart), spending is distributed across many of the core wellness sectors. Most of these countries have large *wellness tourism, spas, & springs* sectors (especially in Switzerland, Iceland, and Austria) as well as sizable *wellness real estate* sectors (especially in Australia).

In the lower-income African countries (the bottom section of the chart), their wellness economies tend to be dominated by just a few sectors. *Healthy eating, personal care & beauty*, and *physical activity* together account for two-thirds to three-quarters of wellness spending in these countries, while other sectors like *wellness real estate* and *workplace wellness* are tiny to non-existent. One notable pattern in Sub-Saharan Africa is that spending on *public health & prevention* represents a substantial share of the wellness economy in most countries across the region. In the countries illustrated in this chart, *prevention & public health* accounts for 15-25% of each country's wellness economy, while the global average is only 9%.

Composition of the Wellness Economy (2020)



This reflects the fact that the other, consumer-driven wellness sectors are generally less developed across this region, due to lower disposable incomes – i.e., people have less money to spend on discretionary goods and services. Meanwhile, low- and lower-middle income countries (especially in Africa) tend to spend a larger portion of their health budgets on preventive and primary health services (often supported by donor aid), while there is less money available for advanced and specialized treatments and expensive pharmaceuticals.¹¹

For the African countries presented in this chart, four sectors (*healthy eating, personal care & beauty, physical activity, and prevention & public health*) account for over 90% of all wellness spending – except in Tanzania, which has a larger *wellness tourism* sector than the others. In contrast, those same four sectors account for only 40-75% of wellness spending in the set of wealthy countries shown at the top of the chart.

* * * * *

This report helps us to understand the role that the wellness economy plays across different regions and countries. Perhaps not surprisingly, the report confirms that consumers in the richest countries and regions spend a larger share of their incomes on wellness. In addition, this report demonstrates how the composition of wellness spending within countries can vary widely, with different wellness sectors dominating the wellness economy in different places. Moreover, the report highlights that some nations can be net exporters or importers of wellness products and services – so the size of the wellness economy in a specific country may not necessarily correlate with how the local population embraces wellness.

While this report provides valuable insights on some important and intriguing questions about how and why nations' wellness economies differ, like most research, it also serves to identify other avenues worth exploring. How can wellness leaders, businesses, governments, and other organizations create opportunities to grow certain wellness sectors? Who benefits directly and indirectly from the growth of these sectors? What is the correlation between the wellness economy and the health and well-being of a nation's population? What policies and practices within these wellness sectors enhance a nation's health and well-being? In our next report, GWI will examine these and other policy related questions, identifying how public policy may impact wellness-enhancing environments and access to wellness-related activities.

¹¹ See: WHO (2019). *Global Spending on Health: A World in Transition*. WHO/HIS/HGF/HFWorkingPaper/19.4. Geneva, Switzerland: WHO. https://www.who.int/health_financing/documents/health-expenditure-report-2019.pdf.

Country Data Tables

Table 1: Wellness Economy Size and Rankings Time Series (2017, 2019, 2020)

	Wellness Economy Size and Rankings Time Series					
	2017*		2019		2020	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
United States	\$1,198.1	1	\$1,409.7	1	\$1,215.7	1
China	\$583.2	2	\$700.2	2	\$682.7	2
Japan	\$288.6	3	\$323.0	3	\$303.6	3
Germany	\$224.4	4	\$244.4	4	\$223.9	4
United Kingdom	\$149.6	5	\$167.8	5	\$158.4	5
France	\$136.9	6	\$150.5	6	\$133.1	6
Canada	\$90.0	10	\$104.2	9	\$95.1	7
South Korea	\$90.0	9	\$101.8	10	\$94.1	8
Italy	\$100.9	8	\$107.5	8	\$91.8	9
Australia	\$81.3	11	\$91.0	11	\$84.4	10
Brazil	\$122.9	7	\$112.6	7	\$82.6	11
India	\$69.9	13	\$87.3	12	\$77.6	12
Russia	\$78.6	12	\$86.8	13	\$71.4	13
Spain	\$69.9	14	\$74.9	14	\$62.6	14
Mexico	\$52.9	15	\$60.4	15	\$46.5	15
Netherlands	\$36.4	20	\$40.3	20	\$41.0	16
Taiwan	\$36.8	19	\$39.1	22	\$38.4	17
Switzerland	\$39.6	16	\$44.6	16	\$38.2	18
Indonesia	\$34.9	21	\$40.6	18	\$36.4	19
Turkey	\$39.4	17	\$39.9	21	\$34.6	20
Philippines	\$29.2	25	\$35.5	23	\$33.0	21
Austria	\$36.9	18	\$40.6	19	\$32.2	22
Poland	\$30.9	24	\$35.3	24	\$31.9	23
Thailand	\$33.4	23	\$43.0	17	\$29.0	24
Sweden	\$26.1	26	\$26.9	27	\$25.6	25
Malaysia	\$23.5	29	\$28.7	25	\$24.4	26
Hong Kong	\$25.7	27	\$27.7	26	\$22.0	27
South Africa	\$23.8	28	\$25.7	28	\$21.7	28
Norway	\$19.3	30	\$20.0	30	\$18.1	29
Belgium	\$16.9	32	\$18.2	31	\$17.4	30
Denmark	\$15.4	35	\$18.2	32	\$17.3	31
Argentina	\$33.7	22	\$22.0	29	\$17.1	32
Vietnam	\$14.4	38	\$17.9	33	\$16.7	33
New Zealand	\$14.8	37	\$16.3	38	\$15.3	34
Saudi Arabia	\$15.1	36	\$16.0	39	\$15.2	35
Finland	\$15.9	33	\$17.3	35	\$15.1	36
Israel	\$13.3	43	\$15.3	40	\$14.2	37

	Wellness Economy Size and Rankings Time Series					
	2017*		2019		2020	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
United Arab Emirates	\$15.4	34	\$17.8	34	\$13.9	38
Portugal	\$14.3	39	\$16.4	37	\$13.8	39
Chile	\$17.1	31	\$16.8	36	\$13.3	40
Peru	\$13.8	40	\$15.2	41	\$13.1	41
Ireland	\$13.4	42	\$14.3	43	\$12.3	42
Egypt	\$9.2	49	\$13.7	46	\$12.0	43
Singapore	\$12.9	44	\$15.1	42	\$12.0	44
Iran	\$9.9	48	\$11.5	50	\$11.9	45
Colombia	\$13.4	41	\$14.1	45	\$11.6	46
Nigeria	\$10.1	47	\$12.6	48	\$11.4	47
Greece	\$12.0	45	\$14.2	44	\$11.1	48
Czech Republic	\$11.7	46	\$13.7	47	\$10.8	49
Ukraine	\$7.8	53	\$11.5	49	\$10.0	50
Romania	\$8.7	50	\$10.7	51	\$9.8	51
Costa Rica	\$8.0	51	\$8.6	53	\$7.2	52
Ecuador	\$7.6	54	\$8.4	55	\$7.2	53
Slovakia	\$7.0	56	\$8.6	54	\$7.1	54
Hungary	\$8.0	52	\$9.1	52	\$7.0	55
Algeria	\$6.9	57	\$7.1	57	\$6.4	56
Bangladesh	\$5.0	64	\$6.2	63	\$6.2	57
Kazakhstan	\$6.3	58	\$7.1	58	\$6.2	58
Pakistan	\$7.6	55	\$7.2	56	\$6.2	59
Kuwait	\$5.4	63	\$6.5	61	\$5.9	60
Kenya	\$5.7	61	\$6.5	60	\$5.9	61
Morocco	\$5.7	60	\$6.7	59	\$5.5	62
Panama	\$6.0	59	\$6.4	62	\$5.0	63
Sri Lanka	\$5.7	62	\$5.7	65	\$4.8	64
Croatia	\$4.9	65	\$5.8	64	\$4.0	65
Bulgaria	\$3.4	68	\$4.6	66	\$3.9	66
Puerto Rico	\$4.4	66	\$4.4	67	\$3.8	67
Uruguay	\$4.1	67	\$3.9	68	\$3.2	68
Ethiopia	\$2.9	75	\$3.7	69	\$3.1	69
Oman	\$3.0	73	\$3.3	73	\$2.8	70
Myanmar	\$2.4	82	\$2.8	79	\$2.8	71
Dominican Republic	\$3.1	70	\$3.6	70	\$2.8	72
Serbia	\$2.8	76	\$3.3	72	\$2.8	73
Tunisia	\$3.1	71	\$3.0	76	\$2.8	74
Qatar	\$2.7	78	\$3.0	77	\$2.7	75
Cuba	\$3.0	72	\$3.1	75	\$2.7	76

	Wellness Economy Size and Rankings Time Series					
	2017*		2019		2020	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
Lithuania	\$2.7	77	\$3.3	74	\$2.7	77
Slovenia	\$3.0	74	\$3.5	71	\$2.7	78
Jordan	\$2.5	80	\$3.0	78	\$2.6	79
Uzbekistan	\$2.7	79	\$2.6	81	\$2.5	80
Belarus	\$2.4	81	\$2.8	80	\$2.5	81
Ghana	\$2.2	83	\$2.6	82	\$2.4	82
Uganda	\$1.8	90	\$2.2	87	\$2.1	83
Angola	\$3.2	69	\$2.4	84	\$1.9	84
Cambodia	\$1.9	87	\$2.5	83	\$1.9	85
Azerbaijan	\$1.7	93	\$2.1	89	\$1.9	86
Zimbabwe	\$1.1	102	\$1.2	104	\$1.9	87
Cote d'Ivoire	\$1.4	98	\$1.8	95	\$1.9	88
Tanzania	\$1.8	91	\$2.1	90	\$1.8	89
Latvia	\$1.8	88	\$2.1	92	\$1.7	90
Luxembourg	\$1.8	89	\$2.1	93	\$1.7	91
Cameroon	\$1.3	99	\$1.6	98	\$1.7	92
Bolivia	\$1.5	96	\$1.7	97	\$1.6	93
Macau	\$2.1	84	\$2.4	85	\$1.6	94
Estonia	\$1.5	95	\$1.8	96	\$1.5	95
Nepal	\$1.5	94	\$1.9	94	\$1.5	96
Iceland	\$1.9	86	\$2.1	91	\$1.5	97
Bahrain	\$2.0	85	\$2.2	86	\$1.5	98
Cyprus	\$1.8	92	\$2.1	88	\$1.5	99
Paraguay	\$1.5	97	\$1.6	99	\$1.4	100
Bosnia Herzegovina	\$1.2	100	\$1.4	101	\$1.3	101
Albania	\$1.0	105	\$1.2	103	\$1.1	102
Georgia	\$1.0	104	\$1.4	100	\$1.0	103
Turkmenistan	\$0.7	115	\$0.9	112	\$1.0	104
Trinidad & Tobago	\$1.0	103	\$1.1	106	\$1.0	105
Senegal	\$0.8	111	\$1.0	110	\$0.9	106
Jamaica	\$1.1	101	\$1.2	102	\$0.9	107
Zambia	\$0.9	107	\$1.0	108	\$0.9	108
Nicaragua	\$0.9	109	\$1.0	111	\$0.8	109
Papua New Guinea	\$0.7	117	\$0.8	116	\$0.7	110
Bahamas	\$1.0	106	\$1.1	107	\$0.7	111
Malta	\$0.8	113	\$0.9	113	\$0.7	112
Laos	\$0.7	116	\$0.8	114	\$0.7	113
North Macedonia	\$0.7	118	\$0.7	118	\$0.7	114
Mauritius	\$0.9	108	\$1.0	109	\$0.6	115
Maldives	\$0.9	110	\$1.1	105	\$0.6	116

	Wellness Economy Size and Rankings Time Series					
	2017*		2019		2020	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
Moldova	\$0.6	120	\$0.7	120	\$0.6	117
Botswana	\$0.8	112	\$0.8	115	\$0.6	118
Armenia	\$0.6	119	\$0.8	117	\$0.6	119
Namibia	\$0.7	114	\$0.7	119	\$0.6	120
Rwanda	\$0.5	122	\$0.6	124	\$0.6	121
Mongolia	\$0.5	121	\$0.6	122	\$0.5	122
Kyrgyzstan	\$0.5	123	\$0.6	121	\$0.5	123
Guinea	\$0.4	129	\$0.5	126	\$0.5	124
Benin	\$0.4	125	\$0.5	125	\$0.5	125
Montenegro	\$0.4	124	\$0.6	123	\$0.4	126
Kosovo	\$0.4	132	\$0.4	131	\$0.4	127
New Caledonia	\$0.4	131	\$0.4	132	\$0.4	128
Gabon	\$0.3	133	\$0.4	133	\$0.4	129
Equatorial Guinea	\$0.3	134	\$0.4	135	\$0.3	130
French Polynesia	\$0.3	135	\$0.4	134	\$0.3	131
Barbados	\$0.4	126	\$0.5	127	\$0.3	132
Aruba	\$0.4	130	\$0.5	128	\$0.3	133
Congo, Rep.	\$0.3	137	\$0.3	136	\$0.3	134
Fiji	\$0.4	127	\$0.4	129	\$0.3	135
Brunei	\$0.2	141	\$0.3	137	\$0.3	136
U.S. Virgin Islands	\$0.3	136	\$0.3	140	\$0.2	137
Seychelles	\$0.4	128	\$0.4	130	\$0.2	138
Curacao	\$0.3	139	\$0.3	141	\$0.2	139
Swaziland (Eswatini)	\$0.2	143	\$0.2	143	\$0.2	140
Mauritania	\$0.2	144	\$0.2	144	\$0.2	141
St. Lucia	\$0.3	138	\$0.3	139	\$0.2	142
Belize	\$0.3	140	\$0.3	138	\$0.2	143
Bhutan	\$0.2	142	\$0.3	142	\$0.2	144
Lesotho	\$0.1	145	\$0.1	145	\$0.1	145
Vanuatu	\$0.1	149	\$0.1	148	\$0.1	146
Grenada	\$0.1	146	\$0.1	146	\$0.1	147
St. Vincent & the Grenadines	\$0.1	147	\$0.1	147	\$0.1	148
Timor-Leste	\$0.1	148	\$0.1	149	\$0.1	149
Solomon Islands	\$0.0	150	\$0.1	150	\$0.1	150

*2017 figures have been revised since GWI released the previous version of the Wellness Economy Monitor. For more information, see the companion GWI report: *The Global Wellness Economy: Looking Beyond COVID (2021)*.

Note: While GWI's global and regional wellness economy figures include analysis of 218 countries, this table excludes most countries with populations of less than 1 million and/or with a GDP per capita of less than US\$1,000, as well as those with major conflicts or humanitarian crises. Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

Table 2: Wellness Economy and GDP Per Capita (2020)

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Switzerland	\$4,372	1	\$83,700	2
Iceland	\$3,728	2	\$73,085	5
United States	\$3,685	3	\$59,886	8
Austria	\$3,568	4	\$47,318	14
Norway	\$3,346	5	\$75,307	4
Australia	\$3,271	6	\$55,915	11
New Zealand	\$2,969	7	\$42,335	20
Denmark	\$2,958	8	\$57,773	10
Hong Kong	\$2,943	9	\$46,032	16
Aruba	\$2,792	10	\$27,897	35
Finland	\$2,707	11	\$46,437	15
Luxembourg	\$2,658	12	\$108,622	1
Germany	\$2,651	13	\$44,637	18
Canada	\$2,498	14	\$45,192	17
Sweden	\$2,464	15	\$53,459	12
Ireland	\$2,448	16	\$69,487	6
Japan	\$2,396	17	\$38,903	25
Macau	\$2,365	18	\$77,257	3
United Kingdom	\$2,350	19	\$40,350	23
Netherlands	\$2,348	20	\$48,800	13
U.S. Virgin Islands	\$2,224	21	\$37,233	26
Singapore	\$2,106	22	\$61,175	7
France	\$1,964	23	\$40,054	24
Seychelles	\$1,944	24	\$16,181	52
South Korea	\$1,814	25	\$31,601	30
Bahamas	\$1,779	26	\$33,191	28
Taiwan	\$1,599	27	\$25,062	38
Israel	\$1,539	28	\$40,791	22
Italy	\$1,529	29	\$32,649	29
Belgium	\$1,506	30	\$44,274	19
Curacao	\$1,428	31	\$18,658	46
United Arab Emirates	\$1,399	32	\$41,444	21
Kuwait	\$1,385	33	\$27,194	36
Costa Rica	\$1,383	34	\$12,185	63
New Caledonia	\$1,373	35	\$33,474	27
Portugal	\$1,322	36	\$21,483	41
Spain	\$1,312	37	\$28,197	34
Malta	\$1,307	38	\$29,341	32

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Slovakia	\$1,274	39	\$17,554	49
Slovenia	\$1,259	40	\$23,511	40
Cyprus	\$1,191	41	\$26,580	37
Puerto Rico	\$1,178	42	\$31,347	31
Panama	\$1,165	43	\$15,178	56
French Polynesia	\$1,127	44	\$21,197	42
Estonia	\$1,115	45	\$20,431	45
Barbados	\$1,061	46	\$17,423	50
Greece	\$1,036	47	\$18,578	47
Maldives	\$1,001	48	\$13,201	62
Czech Republic	\$995	49	\$20,667	44
Croatia	\$964	50	\$13,450	61
Qatar	\$944	51	\$59,128	9
Lithuania	\$938	52	\$16,879	51
Uruguay	\$900	53	\$18,388	48
Latvia	\$877	54	\$15,613	54
Bahrain	\$868	55	\$23,632	39
St. Lucia	\$842	56	\$11,262	64
Poland	\$831	57	\$13,869	60
Malaysia	\$754	58	\$9,965	71
Hungary	\$715	59	\$14,591	59
Chile	\$696	60	\$15,035	57
Montenegro	\$692	61	\$7,800	79
Trinidad & Tobago	\$678	62	\$16,174	53
Brunei	\$605	63	\$28,237	33
Oman	\$553	64	\$15,482	55
Bulgaria	\$544	65	\$8,382	77
Grenada	\$528	66	\$10,153	69
St. Vincent & the Grenadines	\$527	67	\$7,187	83
Mauritius	\$507	68	\$10,485	68
Romania	\$506	69	\$10,777	65
Russia	\$487	70	\$10,724	66
China	\$483	71	\$8,760	76
Saudi Arabia	\$435	72	\$21,114	43
Thailand	\$411	73	\$6,596	86
Turkey	\$409	74	\$10,629	67
Ecuador	\$406	75	\$6,217	89
Belize	\$402	76	\$4,792	98

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Serbia	\$401	77	\$6,293	88
Peru	\$395	78	\$6,728	84
Brazil	\$387	79	\$9,978	70
Bosnia Herzegovina	\$384	80	\$5,392	97
Argentina	\$377	81	\$14,618	58
Albania	\$371	82	\$4,526	99
South Africa	\$364	83	\$6,678	85
Mexico	\$357	84	\$9,343	73
Kazakhstan	\$332	85	\$9,187	74
North Macedonia	\$311	86	\$5,462	94
Philippines	\$301	87	\$3,153	116
Jamaica	\$301	88	\$5,413	96
Fiji	\$299	89	\$6,050	90
Georgia	\$280	90	\$4,359	100
Botswana	\$271	91	\$7,287	81
Belarus	\$260	92	\$5,779	91
Jordan	\$257	93	\$4,274	102
Dominican Republic	\$256	94	\$7,875	78
Equatorial Guinea	\$245	95	\$9,625	72
Moldova	\$245	96	\$3,479	111
Cuba	\$239	97	\$8,940	75
Tunisia	\$234	98	\$3,436	112
Colombia	\$227	99	\$6,577	87
Ukraine	\$225	100	\$2,656	120
Namibia	\$223	101	\$5,439	95
Sri Lanka	\$217	102	\$4,077	105
Kosovo	\$216	103	\$4,027	107
Armenia	\$210	104	\$3,869	109
Paraguay	\$196	105	\$5,608	92
Azerbaijan	\$187	106	\$4,218	103
Vanuatu	\$178	107	\$3,159	115
Vietnam	\$170	108	\$2,958	118
Mongolia	\$165	109	\$3,595	110
Swaziland (Eswatini)	\$162	110	\$4,031	106
Bhutan	\$161	111	\$3,235	114
Turkmenistan	\$161	112	\$7,248	82
Gabon	\$158	113	\$7,370	80
Morocco	\$148	114	\$3,147	117
Algeria	\$146	115	\$4,080	104

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Iran	\$142	116	\$5,472	93
Bolivia	\$134	117	\$3,389	113
Indonesia	\$132	118	\$3,885	108
Zimbabwe	\$126	119	\$1,527	135
Nicaragua	\$122	120	\$2,156	125
Egypt	\$117	121	\$2,485	122
Cambodia	\$110	122	\$1,448	137
Kenya	\$110	123	\$1,805	131
Laos	\$92	124	\$2,453	123
Kyrgyzstan	\$80	125	\$1,255	141
Papua New Guinea	\$79	126	\$2,755	119
Ghana	\$78	127	\$2,087	126
Solomon Islands	\$74	128	\$2,292	124
Uzbekistan	\$74	129	\$1,900	130
Cote d'Ivoire	\$70	130	\$2,067	127
Cameroon	\$63	131	\$1,425	138
Angola	\$59	132	\$4,300	101
India	\$56	133	\$1,981	128
Nigeria	\$56	134	\$1,969	129
Senegal	\$55	135	\$1,361	139
Lesotho	\$54	136	\$1,166	143
Congo, Rep.	\$53	137	\$2,555	121
Myanmar	\$52	138	\$1,177	142
Nepal	\$51	139	\$1,048	145
Zambia	\$50	140	\$1,501	136
Uganda	\$46	141	\$833	147
Rwanda	\$43	142	\$784	150
Timor-Leste	\$41	143	\$1,286	140
Benin	\$38	144	\$1,136	144
Mauritania	\$38	145	\$1,759	132
Bangladesh	\$38	146	\$1,564	133
Guinea	\$37	147	\$796	149
Tanzania	\$30	148	\$1,003	146
Pakistan	\$28	149	\$1,544	134
Ethiopia	\$27	150	\$829	148

For more information on the wellness economy data, see the companion GWI report: *The Global Wellness Economy: Looking Beyond COVID (2021)*. Note: While GWI's global and regional wellness economy figures include analysis of 218 countries, this table excludes most countries with populations of less than 1 million and/or with a GDP per capita of less than US\$1,000, as well as those with major conflicts or humanitarian crises. Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, October 2021 Edition (GDP data).

Table 3: Wellness Economy and Tourism as a Percent of GDP (2020)

	Wellness Economy as a % of GDP		Overall Tourism as a % of GDP	
	% of GDP	Rank	% of GDP	Rank
Seychelles	16.8%	1	28.3%	3
Maldives	14.5%	2	55.9%	1
Aruba	11.9%	3	50.1%	2
Costa Rica	11.4%	4	4.2%	54
St. Lucia	9.6%	5	20.3%	6
Panama	9.5%	6	4.6%	48
Belize	9.4%	7	13.1%	11
Philippines	9.1%	8	9.7%	19
Montenegro	9.0%	9	12.8%	12
Zimbabwe	8.5%	10	1.6%	109
Austria	7.4%	11	4.6%	47
Cambodia	7.3%	12	11.2%	15
Ecuador	7.2%	13	5.4%	42
St. Vincent & the Grenadines	7.2%	14	11.2%	14
Malaysia	7.2%	15	7.2%	31
Curacao	7.2%	16	14.7%	9
New Zealand	7.2%	17	8.0%	25
Albania	7.1%	18	11.4%	13
Bahamas	7.1%	19	19.2%	7
Tunisia	7.1%	20	3.5%	59
Croatia	6.9%	21	9.0%	21
U.S. Virgin Islands	6.9%	22	22.9%	4
Barbados	6.9%	23	8.1%	23
Kyrgyzstan	6.8%	24	10.8%	16
Slovakia	6.7%	25	5.0%	45
Georgia	6.5%	26	7.6%	29
South Africa	6.4%	27	2.0%	99
Nicaragua	6.4%	28	1.5%	112
Ukraine	6.4%	29	7.1%	34
Bosnia Herzegovina	6.4%	30	1.1%	127
Jamaica	6.4%	31	16.6%	8
Hong Kong	6.4%	32	5.0%	46
Peru	6.3%	33	2.5%	75
Macau	6.3%	34	21.5%	5
Iceland	6.3%	35	9.5%	20
Australia	6.2%	36	4.3%	52
Cyprus	6.0%	37	6.0%	39

	Wellness Economy as a % of GDP		Overall Tourism as a % of GDP	
	% of GDP	Rank	% of GDP	Rank
Jordan	6.0%	38	7.2%	33
Japan	6.0%	39	2.1%	96
Fiji	6.0%	40	13.7%	10
Portugal	6.0%	41	7.3%	30
Sri Lanka	5.9%	42	3.3%	62
Mauritius	5.9%	43	8.0%	26
Vanuatu	5.9%	44	8.1%	24
Greece	5.9%	45	7.1%	35
United Kingdom	5.8%	46	1.4%	116
United States	5.8%	47	3.3%	64
Grenada	5.8%	48	7.0%	36
Canada	5.8%	49	2.3%	81
Kenya	5.8%	50	1.4%	114
Lesotho	5.8%	51	2.4%	78
Germany	5.7%	52	2.9%	68
South Korea	5.7%	53	1.2%	125
Thailand	5.7%	54	5.4%	43
Taiwan	5.7%	55	2.1%	91
Brazil	5.7%	56	2.7%	73
Kuwait	5.6%	57	0.3%	146
Finland	5.6%	58	2.1%	94
Uruguay	5.5%	59	2.3%	86
Uganda	5.5%	60	2.3%	84
Bulgaria	5.4%	61	4.3%	51
Rwanda	5.4%	62	1.7%	106
Moldova	5.4%	63	1.9%	104
French Polynesia	5.3%	64	10.5%	18
Namibia	5.3%	65	2.4%	80
Poland	5.3%	66	2.1%	92
North Macedonia	5.3%	67	1.4%	117
Chile	5.3%	68	1.4%	115
Serbia	5.2%	69	1.1%	128
France	5.0%	70	4.4%	50
Switzerland	5.0%	71	2.2%	88
Latvia	5.0%	72	1.6%	110
Norway	5.0%	73	2.3%	85
Bhutan	5.0%	74	8.4%	22
Kosovo	4.9%	75	1.3%	122
Slovenia	4.9%	76	2.2%	90
Armenia	4.9%	77	6.1%	38

	Wellness Economy as a % of GDP		Overall Tourism as a % of GDP	
	% of GDP	Rank	% of GDP	Rank
Spain	4.9%	78	4.4%	49
Denmark	4.8%	79	1.9%	102
Estonia	4.8%	80	3.1%	67
Vietnam	4.8%	81	3.2%	66
Italy	4.8%	82	3.4%	61
Turkey	4.8%	83	3.9%	55
Morocco	4.8%	84	3.3%	63
Russia	4.8%	85	0.9%	135
Swaziland (Eswatini)	4.7%	86	1.8%	105
Zambia	4.7%	87	2.0%	98
Sweden	4.7%	88	2.7%	72
Lithuania	4.7%	89	1.2%	123
Malta	4.6%	90	7.7%	28
China	4.6%	91	3.8%	56
Hungary	4.5%	92	2.3%	82
Netherlands	4.5%	93	2.4%	77
Oman	4.5%	94	6.6%	37
Azerbaijan	4.4%	95	2.7%	74
Nepal	4.4%	96	1.1%	129
Trinidad & Tobago	4.4%	97	5.7%	40
Argentina	4.4%	98	0.7%	140
Czech Republic	4.3%	99	2.4%	79
Algeria	4.3%	100	0.4%	144
Mexico	4.3%	101	7.2%	32
Colombia	4.3%	102	2.2%	87
Bahrain	4.3%	103	10.6%	17
Uzbekistan	4.2%	104	1.2%	124
Bolivia	4.2%	105	2.3%	83
Botswana	4.2%	106	1.7%	108
Cameroon	4.2%	107	3.6%	58
Mongolia	4.1%	108	2.8%	71
Belarus	4.1%	109	2.9%	69
Paraguay	3.9%	110	1.3%	121
Romania	3.9%	111	0.9%	136
New Caledonia	3.9%	112	2.0%	100
United Arab Emirates	3.9%	113	2.8%	70
Senegal	3.8%	114	1.4%	119
Puerto Rico	3.6%	115	2.0%	101
Kazakhstan	3.6%	116	0.8%	139
Laos	3.6%	117	5.5%	41

	Wellness Economy as a % of GDP		Overall Tourism as a % of GDP	
	% of GDP	Rank	% of GDP	Rank
Ghana	3.5%	118	1.1%	130
Singapore	3.5%	119	1.5%	113
Dominican Republic	3.5%	120	5.2%	44
Israel	3.5%	121	2.1%	93
Myanmar	3.5%	122	4.2%	53
Equatorial Guinea	3.4%	123	1.0%	134
Indonesia	3.4%	124	1.4%	118
Belgium	3.4%	125	2.0%	97
Angola	3.3%	126	0.8%	137
Egypt	3.3%	127	3.4%	60
Solomon Islands	3.3%	128	3.8%	57
Ethiopia	3.2%	129	1.9%	103
Guinea	3.1%	130	0.4%	143
Timor-Leste	3.1%	131	0.0%	150
Cote d'Ivoire	3.0%	132	0.3%	145
Papua New Guinea	3.0%	133	1.3%	120
Benin	3.0%	134	0.6%	142
India	2.9%	135	3.3%	65
Ireland	2.9%	136	2.1%	95
Congo, Rep.	2.8%	137	0.2%	148
Tanzania	2.8%	138	2.2%	89
Cuba	2.7%	139	1.5%	111
Nigeria	2.7%	140	0.8%	138
Pakistan	2.4%	141	1.0%	131
Gabon	2.3%	142	1.1%	126
Luxembourg	2.3%	143	2.5%	76
Brunei	2.2%	144	1.0%	133
Mauritania	2.2%	145	0.2%	147
Saudi Arabia	2.2%	146	1.7%	107
Turkmenistan	2.1%	147	1.0%	132
Bangladesh	1.9%	148	0.2%	149
Qatar	1.9%	149	7.7%	27
Iran	1.4%	150	0.6%	141

Tourism figures include international/inbound and domestic trip expenditures. For more information on the wellness economy data, see the companion GWI report: The Global Wellness Economy: Looking Beyond COVID (2021).

Note: While GWI's global and regional wellness economy figures include analysis of 218 countries, this table excludes most countries with populations of less than 1 million and/or with a GDP per capita of less than US\$1,000, as well as those with major conflicts or humanitarian crises.

Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, October 2021 Edition (GDP data); Euromonitor (tourism data).

APPENDIX A: WELLNESS ECONOMY DEFINITIONS

This Appendix provides overall definitions for the wellness economy and its eleven sectors. For more details on the Global Wellness Institute's detailed definitions and measurement methodology for individual sectors, see the companion report, *The Global Wellness Economy: Looking Beyond COVID* (2021).¹²

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).

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.

¹² Yeung, O. and Johnston, K. (2021). *The Global Wellness Economy: Looking Beyond Covid*. Miami, FL: Global Wellness Institute. <https://globalwellnessinstitute.org/industry-research/the-global-wellness-economy-looking-beyond-covid/>.

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.

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.

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.

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.

APPENDIX B: ACKNOWLEDGEMENTS

Measuring the size of the global wellness economy is a massive endeavor that requires research, data, expertise, and insights in eleven sectors across all regions/countries of the world. This update was made more complicated by COVID-19, which upended markets and businesses models in all sectors, shifting consumer behavior and challenging many assumptions we held before the pandemic. The authors want to give special thanks to **Victor Koo** and **Teresa Dai** of Tianren Culture for providing research assistance in multiple sectors for the vast Chinese wellness market. We appreciate **Tomonori Maruyama** of Mitsui Knowledge Industry Co. for his help in accessing and analyzing data in the Japanese spa, hot springs, and hospitality sectors. We thank **Mary Imboden** for computing special workplace wellness data for us using the HERO Scorecard, and **Sara Karerat** of the Center for Active Design for sharing global data on healthy buildings. **Vicky Nash** conducted an informal survey of U.S. hot springs to inform our research, and **Melissa Rodriguez** kindly shared IHSA research reports that contain invaluable information on the global fitness market. We also thank **Lynne McNees** and **Crystal Ducker** of ISPA for sharing their data on the U.S. spa industry with us.

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