

# Understanding Wellness:

## Four Global Forces Driving the Growth of the Wellness Economy

.....

Global Wellness Institute  
White Paper Series

JULY 2019



**GLOBAL WELLNESS  
INSTITUTE™**

EMPOWERING WELLNESS WORLDWIDE

---

# Understanding Wellness:

Four Global Forces Driving the  
Growth of the Wellness Economy

Global Wellness Institute White Paper Series

**JULY 2019**

---



**GLOBAL WELLNESS  
INSTITUTE™**  
EMPOWERING WELLNESS WORLDWIDE

[GLOBALWELLNESSINSTITUTE.ORG](http://GLOBALWELLNESSINSTITUTE.ORG)

# GLOBAL WELLNESS INSTITUTE

## UNDERSTANDING WELLNESS SERIES

---

In a short time span, wellness has become ubiquitous in media and advertising, public discourse, and private conversations, as well as in purchasing decisions and lifestyle choices all around the world. The promise of wellness as a global industry is garnering the attention of entrepreneurs, investors, and even governments. Yet, the concept of wellness is often not well understood, and the usage of the term can be inconsistent and confusing. The Global Wellness Institute (GWI) is the first organization to define the global wellness economy and to provide data on its size and opportunities. In this working paper series - *Understanding Wellness* - GWI researchers will explore the qualitative aspects of the wellness economy to provide an informed point of view and insights on how wellness is evolving now and into the future. Topics may include: the history of wellness, the global forces shaping its growth, its social and economic implications, important definitions and terminologies, etc. This first paper in the series, *Understanding Wellness: The Global Forces Driving the Growth of the Wellness Economy*, examines the four macro forces that are propelling consumer demand and the ongoing robust growth of the wellness economy around the world.

### 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](http://www.globalwellnessinstitute.org)

### ABOUT THE AUTHORS

This white paper was prepared by Ophelia Yeung and Katherine Johnston, Senior Research Fellows at the Global Wellness Institute. Together, they have four decades of experience leading research and strategy development for businesses, universities, research institutions, and multilateral and government organizations under the auspices of SRI International, a Silicon Valley-based technology and innovation company. Since 2008, Ms. Yeung and Ms. Johnston have worked with the team at what has become the Global Wellness Institute to pioneer groundbreaking research on the global wellness economy and its subsectors.

### Copyright © 2019 by the Global Wellness Institute

Quotation of, citation from, and reference to any of the data, findings, and research methodology from this report must be credited to "Global Wellness Institute, *Understanding Wellness: Four Global Forces Driving the Growth of the Wellness Economy*, July 2019." For more information, please contact [research@globalwellnessinstitute.org](mailto:research@globalwellnessinstitute.org) or visit [www.globalwellnessinstitute.org](http://www.globalwellnessinstitute.org).

# CONTENTS

---

.....

<b><i>Background</i></b>	
What Is Wellness?	<i>i</i>
What Is the Wellness Economy?	
.....	
<b>Introduction</b>	<b>1</b>
.....	
<b>The world’s population is growing sicker, lonelier, and older</b>	<b>3</b>
.....	
<b>The environmental crisis is also a health crisis</b>	<b>5</b>
.....	
<b>Health systems are failing to keep up, while the economic burden rises</b>	<b>7</b>
.....	
<b>Consumer demographics, value systems, and lifestyles are rapidly evolving</b>	<b>9</b>
.....	
<b>Looking to the Future</b>	<b>11</b>
.....	
Endnotes	11
.....	

# BACKGROUND: WHAT IS WELLNESS?

Wellness is a modern word with ancient roots. The key tenets of wellness as both preventive and holistic can be traced back to ancient civilizations from the East (India, China) to the West (Greece, Rome). In 19th century Europe and the United States, a variety of intellectual, religious, and medical movements developed in parallel with conventional medicine. With their focus on holistic and natural approaches, self-healing, and preventive care, these movements have provided a firm foundation for wellness today. Wellness-focused and holistic modalities have gained more visibility since the 1960s/1970s under the writings and thought leadership of an informal network of U.S. physicians and thinkers (such as Halbert Dunn, Jack Travis, Don Ardell, Bill Hettler, and others). As these have evolved, proliferated, and gone mainstream, they have informed the healthy-living, self-help, self-care, fitness, nutrition, diet, and spirituality practices that have become a flourishing wellness movement in the 21st century.

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 as we work toward an optimal state of health and wellbeing. Second, wellness is linked to holistic health – that is, it extends beyond physical health and incorporates many different dimensions that should work in harmony (see figure).

Wellness is an individual pursuit – we have self-responsibility for our own choices, behaviors, and lifestyles – but it is also significantly influenced by the physical, social, and cultural environments in which we live.

Wellness is often confused with terms like health, wellbeing, and happiness. While there are common elements among them, wellness is distinguished by not referring to a static state of being (i.e., being happy, in good health, or a state of wellbeing). Rather, wellness is associated with an active process of being aware and making choices that lead toward an outcome of optimal holistic health and wellbeing.

## WELLNESS IS MULTIDIMENSIONAL



Source: Global Wellness Institute

# BACKGROUND: WHAT IS THE WELLNESS ECONOMY?

The wellness economy is a colossal global industry, estimated by the Global Wellness Institute (GWI) as \$4.2 trillion and representing roughly 5.3% of global economic output in 2017. Defined as **industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives**, the wellness economy encompasses ten varied and diverse sectors (see figure).

## GLOBAL WELLNESS ECONOMY: \$4.2 trillion in 2017



Source: Global Wellness Institute

GWI first pioneered this concept and measured the wellness economy in the 2014 *Global Wellness Economy Monitor*. Since that time, the wellness economy grew from \$3.4 trillion to \$4.2 trillion, or by 5.8% annually. This growth rate is over five times as fast as global economic growth (1.1% annually) from 2013-2017.<sup>i</sup>

GWI has conducted original, country-level research to define and quantify five sectors within the wellness economy (wellness real estate, workplace wellness, wellness tourism, spas, thermal/mineral springs). For the other five sectors, GWI draws upon secondary sources to produce a global aggregate figure. GWI's wellness economy figures are updated and released every few years in the *Global Wellness Economy Monitor*. For more information and GWI's most recent data and analysis for the global wellness economy, see: <https://globalwellnessinstitute.org/industry-research/>.

# UNDERSTANDING WELLNESS: FOUR GLOBAL FORCES DRIVING THE GROWTH OF THE WELLNESS ECONOMY

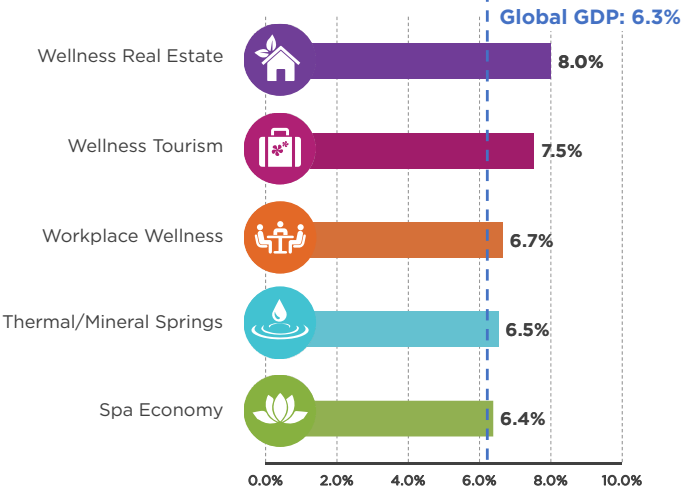
## Introduction

Wellness is a word that was not often spoken or seen in print just ten years ago. Yet, in the last few years, it has become ubiquitous in consumer and trade media and has entered the vernacular all around the world. Within a relatively short span of time, wellness has emerged as a dominant lifestyle value, driving interest in fitness, healthy eating, self-care, mindfulness, stress reduction, wellness vacations, healthy aging, complementary medicine, holistic health, and other wellness practices. As consumer interest in all things related to wellness accelerates, wellness is becoming a selling point for all kinds of products and services – from food and vitamins to real estate and vacation packages, and from gym memberships and healthcare plans to meditation apps and DNA testing kits.

Wellness is estimated by the Global Wellness Institute to be a \$4.2 trillion market in 2017. Its growth rate has consistently outpaced global GDP growth, posting positive gains even in years of global economic downturn. There is no sign that this trend is slowing down. For the next five years, GWI projects robust growth in the five wellness sectors that we track in detail, all of which are projected to continue to grow faster than global GDP (see figure).

What accounts for the seemingly unstoppable growth of wellness, and its proliferation throughout the economy? In recent decades, vast economic, technological, social, demographic, and environmental changes have transformed every aspect of our lives – our homes and communities, food, work, shopping, education, friendship, leisure, travel, etc. – with both positive and negative impacts on our health and wellbeing. The growth of wellness practices and businesses is fundamentally a consumer response to these developments, and this response is turning into a major societal and economic force.

Projected Average Annual Growth Rate, 2017-2022



Source: Global Wellness Institute. Global GDP data from IMF.

This GWI white paper examines the four macro forces that are propelling consumer demand and the ongoing robust growth of the wellness economy.





## The world's population is growing sicker, lonelier, and older.

Deteriorating health, the spread of loneliness and mental illness, and the ramifications of aging all negatively impact people's happiness and wellbeing. In response, consumers around the world are proactively turning to wellness modalities as alternatives to address these challenges.

Lifestyle & environmental disease

Loneliness & mental health

Population aging



## The environmental crisis is also a health crisis.

Environmental degradation directly and indirectly affects us, through the air we breathe, how we procure and consume food, and how we live and travel. As people become aware of these risks, they are seeking out alternative lifestyles that are simultaneously healthier for themselves and more sustainable for the planet.

Pollution

Agriculture & food

Car dependence & unwell lifestyles

Growth of the \$4.2t Wellness Economy



## Health systems are failing to keep up, while the economic burden rises.

Health systems are failing in countries all around the world, and the economic burden is unsustainable. Therefore, it is not surprising that consumers, employers, and even governments are turning to wellness approaches to complement and address deficiencies in healthcare and to turn from "sick care" to prevention.

Failing health systems

Unsustainable economic costs



## Demographics, value systems, & lifestyles are evolving toward wellness.

Consumer values are changing, moving toward a lifestyle of wellness that is fundamentally shifting consumer behaviors and consumption patterns. This shift is bolstered by the rise of the middle class, the accessibility of new options, and a burgeoning concern about the impacts of ubiquitous technology.

Urbanization & middle class growth

Awareness & self-responsibility

Technology & connectivity



# THE WORLD'S POPULATION IS GROWING SICKER, LONELIER, AND OLDER.

---

Consumers are seeking different approaches and models in their personal lives, not only to deal with aging, but also rising chronic and lifestyle diseases, alongside increasing stress and mental health issues. Global statistics in these areas are alarming.

**Lifestyle and environmental disease.** Over the last 50 years, noncommunicable diseases (NCDs) have replaced communicable/infectious diseases as the leading causes of death globally. NCDs (including heart disease, stroke, cancer, diabetes, chronic lung disease, etc.) are collectively responsible for 71% of deaths worldwide,<sup>ii</sup> and they account for more than one-half the global burden of disease.<sup>iii</sup> Once considered to be a “rich country” problem, more than three-quarters of global NCD-related deaths now occur in low- and middle-income countries.<sup>iv</sup>



According to the World Health Organization (WHO), World Economic Forum, United Nations, Council on Foreign Relations, and others, NCDs represent one of the greatest future challenges to global health.<sup>v</sup> And yet, at least 80% of heart disease, stroke, and type 2 diabetes, as well as 40% of cancers, could be prevented by addressing key risk factors.<sup>vi</sup> Consumers are becoming aware that they can reduce risks through physical activity, healthy diets, moderated use of tobacco and alcohol, lower levels of stress, and healthier lifestyles overall. Meanwhile, scientists are only beginning to understand how environmental hazards (such as toxins, molds, pesticides, plastics, and other environmental substances) – along with socioeconomic, community, and social environment factors – contribute to NCDs and other health risks.<sup>vii</sup>

**Loneliness and mental health.** The last 5-10 years have brought growing awareness of a mounting global mental health crisis, alongside the rising burden of physical disease. In 2017, there were an estimated 1.1 billion cases reported worldwide of mental and substance use disorders (affecting around 15% of the world’s population)<sup>viii</sup> – and since mental disorders are widely underreported, the prevalence may be even higher. According to the WHO, depression increased by more than 18% from 2005-2015, and it is the leading global cause of illness and disability.<sup>ix</sup> More than 70% of people with mental illness do not seek treatment, often due to stigma and misunderstanding.<sup>x</sup>

Policymakers and physicians in developed countries are also worried about the rise of loneliness and isolation as a public health epidemic. A recent cross-country survey found that 9% of adults in Japan, 22% in the United States, and 23% in the United Kingdom report always or often feeling lonely or socially isolated.<sup>xi</sup> Loneliness is closely linked with physical and mental illness and has significant health impacts – in fact, its impact on lifespan is similar to smoking 15 cigarettes per day and greater than that of obesity, and it is associated with a greater risk of heart disease, depression, anxiety, dementia, and premature death.<sup>xii</sup> The growing visibility of mental health/illness and its gradual de-stigmatization have opened the door to people seeking help through wellness modalities such as meditation, mindfulness, and yoga.

**Population aging.** Globally, the population aged 60 and over is growing faster than all younger age groups.<sup>xiii</sup> By 2020, adults over age 65 will outnumber children under age 5,<sup>xiv</sup> and by 2050 all regions of the world except Africa will have nearly a quarter or more of their populations at age 60 and above.<sup>xv</sup> With aging populations comes the rise of chronic disease, as well as risk of the risk of loneliness as seniors lose mobility and independence. Social isolation is particularly detrimental for seniors at a phase of their lives when they need more medical care, social services, friends, and hobbies than ever, and is linked with cognitive decline, poor physical and mental health, and higher risk of death.<sup>xvi</sup>

According to the United Nations, “population ageing...is poised to become one of the most significant social transformations of the twenty-first century, with implications for nearly all sectors of society.”<sup>xvii</sup> For individuals, the important question is no longer about increasing lifespan but how to maximize healthy lifespan (compression of morbidity). The world’s aging population, who have collectively amassed considerable wealth in developed countries, is an important market force behind the wellness economy.

Around the world, people’s happiness and wellbeing have been affected by deteriorating health, the spread of loneliness and mental illness, and the ramifications of aging. Wellness provides consumers with new insights, approaches, and tools to address these challenges.



# THE ENVIRONMENTAL CRISIS IS ALSO A HEALTH CRISIS.

---

As the world heads into an environmental crisis, too many governments are not treating it with adequate urgency, partly because the ramifications of things like climate change may seem remote or indirect to most people. However, there is mounting evidence that environmental degradation and its causes are also bringing immediate, direct, severe, and widespread harm to human health and wellbeing.

**Pollution.** Modern living and human activities release enormous toxins into our air, water, soil, and food. This pollution not only affects planetary health, but also human health. Pollution is now the largest environmental cause of disease and premature death, responsible for 9 million avoidable premature deaths worldwide (or 16% of all deaths) in 2015. Over 90% of these deaths were in low- and middle-income countries.<sup>xviii</sup> Nearly three-quarters of these deaths were due to outdoor and indoor air pollution, which increases the incidences of asthma, lung cancer, heart disease, stroke, and other chronic diseases.<sup>xix</sup> In low income regions, people who cook with coal or biomass fuels face particularly high risks from indoor air pollutants, suffering as many as 4 million premature deaths every year from these practices.<sup>xx</sup> Even in high-income countries, where research on “sick-building syndrome” is only emerging, studies have shown that indoor air pollution can be 2-5 times worse than outdoors.<sup>xxi</sup>

The shifting of focus from environmental to human welfare is also beginning to bring attention to some of the sustainability practices that can be harmful to health, such as sealing windows and insulating buildings with toxic materials and substances. In addition to air, water, and soil pollution, researchers are just beginning to realize how light and noise pollution affect human health and wellness. A constant background of artificial sounds, lights, and distractions in the built environment – including traffic, airplanes, and machinery; heating and cooling systems; and digital displays, electronic sounds, and “canned” music – makes it hard to find mental respite, raises stress levels, affects sleep, and even has physical health impacts.



**Agriculture and food.** The 20th century's Green Revolution and industrialization of agriculture have had serious environmental ramifications, including monoculture, reduction of biodiversity, nutrient depletion in soil, pesticides and runoff, genetically-modified organisms, greenhouse gas emissions, and global warming. Only in the last couple of decades has attention shifted to the negative social and health impacts of modern, industrialized agriculture and food systems. The grassroots food movement is now raising awareness of a host of concerns, including the deep connections among farming practices, land use, and health, as well as widespread issues with "food deserts," food insecurity, food equity, and food safety.

The proliferation of the modern, industrialized system of farming and food production, distribution, and marketing is linked to the spread of unhealthy, nutrition-poor, highly-processed Western diets, which contribute to the rise of obesity and chronic disease worldwide. According to the Global Burden of Disease study, poor diet is a factor in one out of five deaths around the world.<sup>xxii</sup> In addition, contaminated foods are responsible for 600,000 million illnesses (nearly 1 in 10 people) and 420,000 deaths every year, resulting in the loss of 33 million healthy life years.<sup>xxiii</sup>

**Car dependence and unwell lifestyles.** North America has been the epicenter of low-density, car-dependent, residential suburban development and sprawl over the last century, and these building practices have increasingly been adopted in other regions throughout the world (especially in rapidly urbanizing developing countries that lack resources and planning for public transit). While the widespread environmental costs of automobile dependency are widely recognized (fossil fuel dependence, pollution, climate change), attention has turned more recently to its health and wellbeing impacts. Planning and design approaches that favor motor vehicles over pedestrians have greatly reduced people's ability to walk or cycle as a means of transport and greatly increased the time spent in cars, thereby reducing daily exercise opportunities and time with family and friends. The car culture also reinforces housing design conventions that reduce social interaction (e.g., wide streets, lack of sidewalks and trees, and attached garages in which people park their cars and immediately disappear into their homes without seeing any neighbors).

In many parts of the world, people now live and work in obesogenic built environments that reinforce a sedentary and even anti-social lifestyle – favoring driving over biking, sitting over walking, riding in elevators over using the stairs, texting over face-to-face conversation with a neighbor, and watching videos over outdoor recreation. It is no wonder that one in four adults do not get sufficient physical activity, obesity has nearly tripled worldwide since 1975, and 39% of adults are now overweight<sup>xxiv</sup> – all key risk factors that directly contribute to the rise of NCDs. Looking at the longer term, most scientists agree that our carbon-dependent built environments and lifestyles are leading to global climate change and increased risk of storms, floods, droughts, rising sea levels, pests, and so on – with potentially catastrophic threats to our living environments and health.

Environmental degradation directly and indirectly affects our health and wellbeing, through the air we breathe, how we procure and consume food, and how we live and travel. As people become aware of these risks, they are seeking out alternative lifestyles that are simultaneously healthier for themselves and more sustainable for the planet.



# HEALTH SYSTEMS ARE FAILING TO KEEP UP, WHILE THE ECONOMIC BURDEN RISES.

---

Focused on “sick care” and burdened by rising costs, healthcare systems in countries across the development spectrum are ill-prepared to address the global crisis of noncommunicable disease and mental illness. The burden of disease is immense, affecting families (out of pocket costs, lost work and income, suffering), businesses (rising health premiums for employees, lost productivity, absenteeism, etc.), and governments (rising costs for national healthcare systems, etc.).

**Failing health systems.** Health systems around the world are failing to meet the challenges of caring for the growing number of aging, chronically ill, and mentally ill patients. The specific problems vary from country to country, but mainly involve widespread issues with cost, availability, and quality of healthcare, as well as systemic issues with inequality and health equity. The current healthcare industry model, based on the paradigm of conventional Western medicine, is increasingly seen to be broken – a model that costs too much and delivers too little. Global health expenditures reached \$7.2 trillion in 2015 and have grown from 8.6% of global GDP in 2000 to 9.9% in 2015.<sup>xxvi</sup>

While healthcare expenditures are becoming unsustainable – especially in developed economies where health spending growth is outpacing GDP growth<sup>xxvii</sup> – these ever-growing expenditures are failing to stem the rising tide of chronic disease. Most medical systems are designed to focus on acute care over chronic care and prevention. The Global Wellness Institute (GWI) estimates that only about 4-5% of annual global health expenditures are on prevention, risk reduction, and public health. Meanwhile, recent research on the determinants of health indicates that up to 80-90% of our health outcomes may be due to external and environmental factors. These include economic and housing inequality, neighborhood and city planning, transportation infrastructure, education systems, social and cultural environments, physical environments, and many other factors that extend far beyond the realm of the healthcare system.<sup>xxviii</sup> These “upstream”



factors have only recently started to be recognized and understood by public health experts and would require attention at all levels of government in order to address the growing global health epidemic and escalating medical costs.

**Unsustainable economic costs.** Failure to address these global health crises creates an enormous economic burden – not only from direct medical costs, but also from tremendous social and business costs that reduce productivity, shrink the labor force, and dampen economic growth. Families and communities face prolonged disability, loss of breadwinners, and diminished financial resources, alongside extensive human suffering. Businesses face significant costs due to employee absenteeism and presenteeism (i.e., when a person at work is unable to perform at full capacity due to illness, stress, or other issues). The World Economic Forum and Harvard School of Public Health estimated that four major chronic diseases and mental illness will result in a projected cumulative \$47 trillion in lost economic output globally from 2011-2030, and this loss “represents enough money to eradicate two dollar-a-day poverty among the 2.5 billion people in that state for more than half a century.”<sup>xix</sup>

While high-income countries currently bear the largest share of these costs, lower- and middle-income countries will bear more and more of this burden as their economies and populations grow. In developing countries, the cumulative economic losses from chronic disease and mental illness are projected at \$21.3 trillion from 2011-2030 – a cost that is equivalent to nearly three-quarters of the combined economic output of these countries in 2017. Growth of NCDs in these countries directly impedes progress toward key UN Sustainable Development Goals such as poverty alleviation and reduced inequality, due to lack of resources for treatment, greater risk of death, and a “disease-poverty trap” among poorer populations that is passed down through generations. Healthy populations are critical to sustain future economic growth.

Health systems are failing in countries all around the world, and the economic burden is unsustainable. Therefore, it is not surprising that consumers, employers, and even governments are turning to wellness approaches to complement and address deficiencies in healthcare and to turn from “sick care” to prevention.

# CONSUMER DEMOGRAPHICS, VALUE SYSTEMS, AND LIFESTYLES ARE RAPIDLY EVOLVING TOWARD WELLNESS.

---

Rapidly evolving global demographics, lifestyles, and value systems are increasing consumer interest in, knowledge of, and access to wellness modalities, products, and services, even as these developments create more need for wellness.

**Urbanization and growth of the middle class.** Economic growth is rapidly enlarging the global middle class. September 2018 marked a “tipping point” where more than 50 percent of the global population (3.8 billion people) are now considered “middle class” or “rich.” Most of the new entrants to the middle class are Asian and from developing countries.<sup>xxxii</sup> Middle class consumers drive global economic growth, with their large numbers and their discretionary funds to spend on enhancing quality of life or searching for fulfilment and happiness (e.g., health, education, travel, entertainment, experiences, etc.). The wellness economy has benefitted from this growing consumer base.

Parallel to this development is rapid urbanization. The share of global population living in urban areas has risen from 30% in 1950 to 55% in 2018, and it is projected to grow to 68% by 2050. Much of this growth will come from developing countries, especially India, China, and Nigeria.<sup>xxxiii</sup> The twin phenomenon of urbanization and a growing middle class has upended traditional lifestyles and aspirations, including living arrangements, eating habits, physical activities, work, families, communities, values, tastes, and much more. This “new” lifestyle has many unhealthy aspects, such as automobile dependency, consumption of processed foods, sedentary lives, stress, loneliness and social isolation, increased exposure to pollutants, etc.,<sup>xxxiii</sup> which in turn increase the risk factors for chronic disease, as well as the demand for wellness.

**Consumer awareness, openness, and self-responsibility.** Wellness first took hold in the West 30-40 years ago, when the interest of Baby Boomers in complementary and non-Western health modalities, wellness, foods, mind-body, and so on brought practices such as chiropractic, yoga, meditation/mindfulness, acupuncture, Traditional Chinese Medicine, herbal remedies, and vitamins/supplements into





the mainstream culture in North America and Europe. Baby Boomers have fueled the birth and growth of the modern fitness, spa, organic/healthy food, and workplace wellness industries, and will continue to be among the largest purchasers of health- and wellness-related products and services as they seek to mitigate the effects of aging.

Meanwhile, the values of younger generations are driving further cultural, social, and economic shifts, especially as they head into their peak earning years. Millennials now account for over 31 percent of the world's population,<sup>xxxiv</sup> and nearly nine out of ten Millennials live in developing countries.<sup>xxxv</sup> Core values of this generation include meaningful work and self-fulfillment, work-life balance and flexibility, collaboration and connection, diversity, experience, and authenticity, and these values are driving growth and major shifts in health and wellness, travel, media, technology, and many other industries. Particularly important to wellness are younger generations' emphasis on experiences over consumption, as well as their environmental and social consciousness.

**Technology and connectivity.** Technological innovations have brought both positive and negative impacts for human health and wellbeing. Advances in medicine, public health, and urban planning have extended lifespans, reduced communicable diseases, and improved quality of life for people worldwide. The rise of the Internet and digital technologies has exposed billions of people to different healing practices, healthcare approaches, and philosophies and beliefs across countries and cultures, supporting the growing interest in and business growth around non-Western and traditional wellness modalities such as yoga, Ayurveda, Traditional Chinese Medicine, reiki, balneotherapy, and so on. Supported by today's all-pervasive media, celebrities, social media influencers, and self-help experts around the world promote self-actualization, living your best life, improving your self-image, living and eating better, getting fit, and all things wellness. Technology also brings new wellness and preventive health opportunities, including wellness apps and trackers for individuals, DNA screening and analysis, new diagnostic methods and tools, personalized medicine and telemedicine, etc.

However, technology is also a double-edged sword. Some of its adverse effects on wellness include: 1) reduced sleep quantity and quality; 2) inactivity, obesity, other physiological effects from prolonged sitting and screen time; 3) reduced mental wellness linked with screen time and social media usage (including depression, anxiety, and childhood cognitive development and attention); 4) reduced quality of social relationships and loneliness; 5) distraction and safety (e.g., texting while driving); and 6) reduced productivity due to an always-on culture and stress.<sup>xxxvi</sup> Growing consumer awareness of the many unhealthy aspects of technology is supporting a burgeoning backlash; recognition of the need to disconnect, slow down, and be more mindful; and growth of many wellness-related movements and offerings, such as digital detox and digital-free zones, nature-based therapies and getaways (e.g., forest bathing, thermal bathing), off-the-grid travel, silent retreats, bans on after-hours emails in workplaces, a new industry of sleep-related therapies and products, and much more.

Consumer values are changing, moving toward a wellness lifestyle that is fundamentally shifting consumer behaviors and consumption patterns. This shift is bolstered by the rise of the middle class, the accessibility of new product and service options, and a burgeoning concern about the impacts of ubiquitous technology.

## LOOKING TO THE FUTURE

---

For an expanding set of consumers, wellness has become an important value system used to filter daily life and decision-making, with a growing focus on issues such as food quality and the way food is prepared and consumed; mitigating stress and boosting mental wellness; incorporating movement into daily activities; environmental consciousness; the yearning for connection; the desire for self-actualization; and a search for happiness. The upward momentum of the global wellness economy will be strong, as the underlying trends that propel it remain as compelling as ever.

## ENDNOTES

---

i Global GDP data from: IMF, *World Economic Outlook Database*, October 2018 Edition, <https://www.imf.org/external/pubs/ft/weo/2018/02/weodata/index.aspx>.

ii WHO (2018, June 1). *Fact Sheet: Noncommunicable diseases*. <http://www.who.int/en/news-room/fact-sheets/detail/noncommunicable-diseases>.

iii Benziger, C.P., Roth, G.A., and Moran, A.E. (2016). The Global Burden of Disease Study and the Preventable Burden of NCD. *Global Heart*, 11(4), 393-397. <https://doi.org/10.1016/j.gheart.2016.10.024>.

iv Ibid.

v See: 1) WHO (2005). *Preventing Chronic Diseases: A Vital Investment*. [http://www.who.int/chp/chronic\\_disease\\_report/contents/en/](http://www.who.int/chp/chronic_disease_report/contents/en/). 2) Adler-Waxman, A. (2017, Dec. 7). This is the biggest challenge to our health. *World Economic Forum: Shaping the Future of Health and Healthcare Initiative*. <https://www.weforum.org/agenda/2017/12/healthcare-future-multiple-chronic-disease-ncd/>. 3) United Nations (2018, Feb. 16). *New UN high-profile panel set to take on noncommunicable diseases, cause of seven in 10 deaths globally*. <https://news.un.org/en/story/2018/02/1002921>. 4) Council on Foreign Relations, *The Emerging Crisis: Noncommunicable Diseases*, [https://www.cfr.org/interactives/diseases-noncommunicable?cid=otr-marketing\\_use-NCDs\\_interactive/#!/](https://www.cfr.org/interactives/diseases-noncommunicable?cid=otr-marketing_use-NCDs_interactive/#!/).

vi WHO (2005). *Preventing Chronic Diseases: A Vital Investment - Misunderstanding #4*. [https://www.who.int/chp/chronic\\_disease\\_report/part1/en/index11.html](https://www.who.int/chp/chronic_disease_report/part1/en/index11.html).

vii See: 1) Sears, M.E., and Genus, S.J. (2012). Environmental Determinants of Chronic Disease and Medical Approaches: Recognition, Avoidance, Supportive Therapy, and Detoxification. *Journal of Environmental and Public Health*, 2012, 15 pages. <https://doi.org/10.1155/2012/356798>. 2) Rappaport, S., and Smith, M.T. (2010). Environment and Disease Risks, *Science*, 330(6003), 460-461. <https://doi.org/10.1126/science.1192603>. 3) Egger, G., and Dixon, J. (2014). Beyond Obesity and Lifestyle: A Review of 21st Century Chronic Disease Determinants. *BioMed Research International*. 2014, 12 pages. <https://doi.org/10.1155/2014/731685>.

viii Authors' analysis of data from Institute for Health Metrics and Evaluation, *Global Health Data Exchange*, <http://ghdx.healthdata.org/>, accessed November 30, 2018.

ix WHO (2017, March 30). 'Depression: let's talk' says WHO, as depression tops list of causes of ill health. *WHO News Release*. <http://www.who.int/en/news-room/detail/30-03-2017--depression-let-s-talk-says-who-as-depression-tops-list-of-causes-of-ill-health>.

x Henderson, C., Evans-Lacko, S., and Thornicroft, G. (2013). Mental Illness Stigma, Help Seeking, and Public Health Programs. *American Journal of Public Health*, 103(5), 777-780. <https://doi.org/10.2105/AJPH.2012.301056>.

xi DiJulio, B., Hamel, L., et al (2018, August 30). *Loneliness and Social Isolation in the United States, the United Kingdom, and Japan: An International Survey*. <https://www.kff.org/other/report/loneliness-and-social-isolation-in-the-united-states-the-united-kingdom-and-japan-an-international-survey/>.

xii McGregor, J. (2017, Oct. 4). This former surgeon general says there's a 'loneliness epidemic' and work is partly to blame. *Washington Post*. [https://www.washingtonpost.com/news/on-leadership/wp/2017/10/04/this-former-surgeon-general-says-theres-a-loneliness-epidemic-and-work-is-partly-to-blame/?utm\\_term=.47eb7d4d8bc5](https://www.washingtonpost.com/news/on-leadership/wp/2017/10/04/this-former-surgeon-general-says-theres-a-loneliness-epidemic-and-work-is-partly-to-blame/?utm_term=.47eb7d4d8bc5).

- xiii United Nations (n.d.). *Global Issues: Ageing*. <http://www.un.org/en/sections/issues-depth/ageing/>, accessed November 30, 2018.
- xiv He, W., Goodkind, D., and Kowall, P. (2016, March). *An Aging World: 2015*. U.S. Census Bureau, International Population Reports. Washington, DC: U.S. Government Publishing Office. <https://www.census.gov/content/dam/Census/library/publications/2016/demo/p95-16-1.pdf>.
- xv United Nations (n.d.). *Global Issues: Ageing*. <http://www.un.org/en/sections/issues-depth/ageing/>, accessed November 30, 2018.
- xvi Snedeker, L. (2017, Jan./Feb.). Aging & Isolation – Causes and Impacts. *Social Work Today*, 17(1), 24. <http://www.socialworktoday.com/archive/011917p24.shtml>.
- xvii United Nations, Dept. of Economic and Social Affairs, Population Division (2015). *World Population Ageing*. New York: United Nations. [http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2015\\_Report.pdf](http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2015_Report.pdf).
- xviii Landrigan, P.J., et al (2018). The Lancet Commission on Pollution and Health. *The Lancet*, 391(10119), 462-512. [https://doi.org/10.1016/S0140-6736\(17\)32345-0](https://doi.org/10.1016/S0140-6736(17)32345-0).
- xix WHO (n.d.). *Air pollution*. <https://www.who.int/airpollution/en/>, accessed November 30, 2018.
- xx WHO (2018, May 8). *Household Air Pollution and Health Fact Sheet*. <http://www.who.int/mediacentre/factsheets/fs292/en/>.
- xxi U.S. Environmental Protection Agency (n.d.). *Volatile Organic Compounds' Impact on Indoor Air Quality*. <https://www.epa.gov/indoor-air-quality-iaq/volatile-organic-compounds-impact-indoor-air-quality>, accessed November 30, 2018.
- xxii Boseley, S. (2017, Sept. 14). Poor diet is a factor in one in five deaths, global disease study reveals. *The Guardian*. <https://www.theguardian.com/society/2017/sep/14/poor-diet-is-a-factor-in-one-in-five-deaths-global-disease-study-reveals>. Cites data from: *The Lancet*, Global Burden of Disease Study, <https://www.thelancet.com/gbd>.
- xxiii WHO (2017, Oct. 31). *Food Safety Fact Sheet*. <http://www.who.int/news-room/fact-sheets/detail/food-safety>.
- xxiv 1) WHO (2018, Feb. 23). *Physical Activity Fact Sheet*. <http://www.who.int/news-room/fact-sheets/detail/physical-activity>. 2) WHO (2016, June). *Obesity and Overweight Fact Sheet*. <http://www.who.int/mediacentre/factsheets/fs311/en/>.
- xxv WHO, *Global Health Observatory: Health Financing*, [https://www.who.int/gho/health\\_financing/en/](https://www.who.int/gho/health_financing/en/).
- xxvi WHO *Global Health Expenditures* data, as cited in World Bank, *World Development Indicators*, <https://data.worldbank.org/indicator/SH.XPD.CHEX.GD.ZS>.
- xxvii OECD (2015). *Fiscal Sustainability of Health Systems: Bridging Health and Finance Perspectives*. Paris: OECD Publishing. <http://www.oecd.org/health/fiscal-sustainability-of-health-systems-9789264233386-en.htm>.
- xxviii See Global Wellness Institute (2018). *Build Well to Live Well: Wellness Lifestyle Real Estate and Communities*. <https://globalwellnessinstitute.org/industry-research/wellness-real-estate-communities-research/>.
- xxix Bloom, D.E., et al (2011, September). *The Global Economic Burden of Non-communicable Diseases*. Geneva, Switzerland: World Economic Forum. [http://www3.weforum.org/docs/WEF\\_Harvard\\_HE\\_GlobalEconomicBurdenNonCommunicableDiseases\\_2011.pdf](http://www3.weforum.org/docs/WEF_Harvard_HE_GlobalEconomicBurdenNonCommunicableDiseases_2011.pdf).

xxx Bloom, et al. GDP data from World Bank, *World Development Indicators*.

xxxi Kharas, H. and Hamel, K. (2018, Sept. 27). A global tipping point: Half the world is now middle class or wealthier. *Brookings*. <https://www.brookings.edu/blog/future-development/2018/09/27/a-global-tipping-point-half-the-world-is-now-middle-class-or-wealthier/>.

xxxii United Nations (2018). *World Urbanization Prospects: The 2018 Revision – Key Facts*. <https://esa.un.org/unpd/wup/Publications/Files/WUP2018-KeyFacts.pdf>.

xxxiii Kharas, H. (2017, Feb.). *The Unprecedented Expansion of the Global Middle Class: An Update*. Brookings Global Economy & Development Working Paper 100. Washington, DC: Brookings. [https://www.brookings.edu/wp-content/uploads/2017/02/global\\_20170228\\_global-middle-class.pdf](https://www.brookings.edu/wp-content/uploads/2017/02/global_20170228_global-middle-class.pdf).

xxxiv Miller, L.J., and Lu, W. (2018, Aug. 20). Gen Z Is Set to Outnumber Millennials Within a Year. *Bloomberg*. <https://www.bloomberg.com/news/articles/2018-08-20/gen-z-to-outnumber-millennials-within-a-year-demographic-trends>.

xxxv See: 1) Hamel, K., Fenz, K., and Hofer, M. (2018, April 30). How to harness the spending power of millennials: Move beyond the US. *Brookings*. <https://www.brookings.edu/blog/future-development/2018/04/30/how-to-harness-the-spending-power-of-millennials-move-beyond-the-us/>. 2) Tilford, C. (2018, June 6). The Millennial Moment – In Charts. *Financial Times*. <https://www.ft.com/content/f81ac17a-68ae-11e8-b6eb-4acfcfb08c11>.

xxxvi McCarthy, J., Bauer, B., et al (2018, April). *Wellness in the Age of the Smartphone*. Global Wellness Institute: Digital Wellness Initiative. <https://globalwellnessinstitute.org/initiatives/initiative-projects/wellness-in-the-age-of-the-smartphone-whitepaper/>.



**GLOBAL WELLNESS**  
**INSTITUTE™**  
EMPOWERING WELLNESS WORLDWIDE

333 S.E. 2nd Avenue, Suite 2048  
Miami, FL 33131, USA

[www.globalwellnessinstitute.org](http://www.globalwellnessinstitute.org)