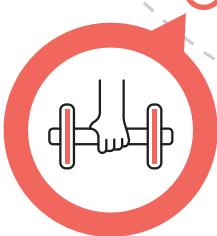


Move to be Well:

The Global Economy of Physical Activity



Equipment & Supplies



Fitness



Apparel & Footwear



Sports & Active Recreation



Mindful Movement



Technology

Executive Summary
OCTOBER 2019



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Move to be Well: The Global Economy of Physical Activity

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EXECUTIVE SUMMARY



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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

Move to be Well: The Global Economy of Physical Activity was co-authored 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. Tonia Callender, GWI Research Fellow, contributed significant research in global, regional, and country-level developments. Alice Rusnak, Research Intern, provided assistance in literature and data research.

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EXECUTIVE SUMMARY

Physical activity is essential to health, and yet, collectively we have become more inactive.

Physical activity is intrinsic to wellness, and the link between physical activity and good health has been clinically and scientifically proven. Yet, physical activity has been declining in the past few decades¹, to the point where as many as 27.5%² to 31%³ of adults around the world are now physically inactive. *The Lancet* has described the rise of physical inactivity as “pandemic, with far-reaching health, economic, environmental, and social consequences.”⁴ There is no question that our modern lifestyles discourage physical activity. Practically all aspects of life – from work and home chores to socialization, shopping, entertainment, etc. – have been transformed by urbanization, technology, motorized transportation, and new business models to become ever more sedentary. Meanwhile, our modern built environments – with auto-centric planning, declining recreational and green spaces, etc. – also discourage natural movement. Not surprisingly, most people now need to schedule time and activities in order to stay physically active.

The global growth of the fitness industry plays an important role in expanding access to physical activity, by making exercise more convenient, affordable, fun, personalized, and results-driven. Health clubs and gyms have experienced tremendous global expansion over the last decade, with over 50% growth in revenues from 2007-2018.⁵ In 2017, the Global Wellness Institute (GWI) estimated that the “fitness and mind-body” sector was worth \$595 billion, an important component of the \$4.2 trillion global wellness economy.⁶ The conundrum is that alongside the growth of the fitness industry, physical inactivity, obesity, and chronic disease have all continued to rise. As the fitness industry develops more and more choices for those who are able and can afford to exercise, there remains a massive swath of inactive population who have limited options (including many seniors; women and girls; children and teens; people in poor health; and those living in poor, rural, and marginalized areas). The reality is that participating in “fitness” remains a privilege that is not accessible for many people around the world.

The opportunity to engage in physical activity that enables a healthy life should not be a privilege or choice, but a right.

Health-enhancing physical activities are much broader than things that typically take place within a gym or health club. To make good health equitable to all, it is necessary for all populations to engage in physical activities of many kinds, beyond what is generally considered within the narrow definition of “fitness.” For this reason, GWI has expanded the scope of this key wellness sector from “fitness and mind-body” to “physical activity.” Reversing the global trend of physical inactivity is a gargantuan task that will require concerted efforts by the public and nonprofit sectors, in addition to private enterprises, to improve access and remove barriers to physical activity for all.

What does this study measure?

Physical activity is not only something that we do for our health, but also generates significant economic activity. Expenditures on leisure-time fitness, exercise, and active recreation represent a growing household spending line item, providing business and innovation opportunities for entrepreneurs and investors around the world. The purpose of this study is to measure the size of the **global physical activity market** and its key segments, and to highlight emerging trends, business models, cross-country variations, and public/nonprofit initiatives that can help bring physical activity to all. In this study, the global physical activity market is defined as **consumer spending associated with intentional physical activities performed during leisure and recreation**. The core of the market is the services that allow consumers to participate in three categories of recreational physical activities: **fitness, sports and active recreation, and mindful movement**. It also includes the supporting sectors that enable and facilitate participation in recreational physical activities: **equipment and supplies, apparel and footwear, and technology**.

Physical activity is also supported by significant government expenditures, including publicly-funded infrastructure for active transportation, parks and recreation, sports facilities and programs, physical education in schools, prescriptions for exercise, etc. These public expenditures are massive, made at the national, state/provincial, and local levels in almost every country; however, they are impossible to measure across the world and are therefore beyond the scope of this study. (See discussion of “What This Study Does Not Measure” in *Chapter II* of the full report on the sectors and economic activities that are excluded by this study.)

Physical activity is an \$828 billion global market.

The Global Wellness Institute (GWI) estimates that recreational physical activities generated \$828.2 billion in private sector economic activity in 2018. Within this market, 44% or \$367.7 billion represents direct consumer expenditures on activity participation (fitness, sports and active recreation, and mindful movement). The remaining 56% or \$465.9 billion represents the enabling sectors (apparel and footwear; fitness equipment, sporting goods, and related supplies; and fitness- and exercise-related technologies).

GLOBAL PHYSICAL ACTIVITY ECONOMY: \$828 Billion in 2018



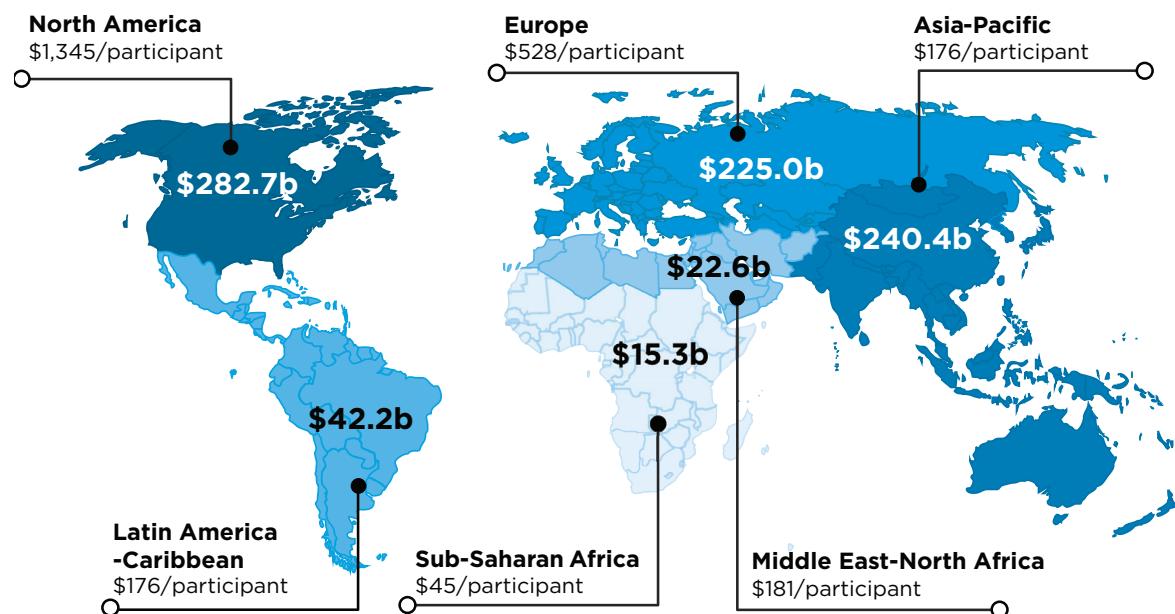
Note: Numbers do not sum to total due to overlap in segments.

Source: Global Wellness Institute

Globally, physical activity spending averages about \$306 per participant per year, with \$136 spent on participating in activities and \$172 spent on apparel, footwear, equipment, sporting goods, and technology devices and services. Per participant expenditures are very high in North America (\$1,345) and Europe (\$528) while significantly lower in the rest of the world. **Importantly, a large portion of the global population, especially in less wealthy countries, participates in recreational physical activities without spending much money** – for example, playing soccer in an empty field, swimming in a public/community pool, running in the streets, or doing tai chi in a park. Many of these free activities depend on publicly-funded infrastructure such as local parks and recreational centers, but participation in these activities still generates significant private sector economic activities, such as athletic shoes and clothing purchases, government purchases of equipment for community gyms or parks, etc.

Physical Activity Market by Region, 2018

Expenditures on participation in recreational physical activities and supporting products and services (equipment & supplies, apparel & footwear, technology)



Global: \$828.2b Expenditures (\$306/participant) • 35% Participation Rate

Note: Numbers may not sum to total due to rounding.
Source: Global Wellness Institute

Globally, the top twenty markets account for 86% of all physical activity spending globally. In many large markets, spending on enabling sectors – largely driven by apparel and shoes purchases – can greatly exceed spending on actual physical activity participation, such as in the United States, France, Brazil, India, and South Africa. In other countries, such as South Korea, Australia, and Netherlands, the opposite is the case. The rate of participation in recreational physical activities varies widely among the top markets, ranging from a high of 84% in Australia and Taiwan to a low of 15% in India.

Top Twenty Physical Activity Markets by Market Size, 2018

	Recreational Physical Activities		Enabling Sectors (US\$ billions)	TOTAL Physical Activity Market (US\$ billions)	Rank in 2018
	Participation Rate*	Market Size* (US\$ billions)			
United States	58.8%	\$105.0	\$162.2	\$264.6	1
China	48.6%	\$53.6	\$56.9	\$109.3	2
Japan	69.6%	\$20.8	\$23.2	\$43.9	3
United Kingdom	56.8%	\$20.5	\$20.6	\$40.9	4
Germany	56.2%	\$20.3	\$19.3	\$39.4	5
France	51.7%	\$11.0	\$15.4	\$26.3	6
South Korea	73.7%	\$14.2	\$9.3	\$23.5	7
Italy	35.9%	\$8.9	\$10.5	\$19.3	8
Canada	48.4%	\$9.3	\$9.0	\$18.1	9
Australia	84.1%	\$11.4	\$5.4	\$16.7	10
Spain	49.5%	\$7.9	\$7.8	\$15.6	11
Brazil	37.7%	\$5.9	\$8.3	\$14.1	12
India	15.0%	\$3.5	\$10.0	\$13.4	13
Russia	57.8%	\$4.9	\$7.6	\$12.4	14
Mexico	44.0%	\$4.2	\$6.9	\$11.1	15
Netherlands	65.2%	\$6.0	\$3.3	\$9.3	16
Switzerland	71.8%	\$5.9	\$3.3	\$9.2	17
South Africa	31.3%	\$2.1	\$6.1	\$8.2	18
Taiwan	84.0%	\$3.7	\$4.1	\$7.7	19
Sweden	78.0%	\$2.8	\$3.2	\$5.9	20

* Participation rate measures the share of the total population who participate in one or more of the three physical activity categories on a regular basis (at least monthly). Market size measures consumer expenditures on classes, memberships, entry fees, trainers, and related services and methods of participation.

Note: Figures may not sum to total due to overlap between segments and rounding.

Source: Global Wellness Institute estimates, based upon data from Euromonitor International, Statista, and many other sources

Global Rankings for Recreational Physical Activity by Participation, 2018

	Participation Rate*	Rank		Participation Rate*	Rank
Australia	84.1%	1	Uruguay	45.5%	38
Taiwan	84.0%	2	Czech Republic	45.3%	39
Norway	83.9%	3	Lithuania	44.4%	40
New Zealand	83.8%	4	Costa Rica	44.3%	41
Iceland	79.2%	5	Mexico	44.0%	42
Sweden	78.0%	6	Panama	43.6%	43
Finland	77.5%	7	Trinidad & Tobago	42.5%	44
Mongolia	75.0%	8	Kuwait	41.8%	45
South Korea	73.7%	9	Hungary	41.3%	46
Denmark	73.5%	10	Malaysia	41.1%	47
Switzerland	71.8%	11	Peru	40.7%	48
Japan	69.6%	12	Slovakia	40.5%	49
Luxembourg	66.0%	13	Laos	39.8%	50
Netherlands	65.2%	14	Malawi	39.6%	51
Singapore	64.9%	15	Argentina	39.5%	52
Ireland	64.1%	16	Cuba	39.3%	53
Israel	61.5%	17	Turkey	39.2%	54
Slovenia	60.2%	18	Botswana	39.1%	55
Belgium	59.1%	19	Ecuador	39.1%	56
United States	58.8%	20	Bahrain	38.5%	57
Hong Kong	58.2%	21	Qatar	38.5%	58
Russia	57.8%	22	Brazil	37.7%	59
United Kingdom	56.8%	23	Latvia	37.3%	60
Germany	56.2%	24	Angola	36.0%	61
France	51.7%	25	Italy	35.9%	62
Macau	51.1%	26	Togo	35.9%	63
Austria	50.4%	27	Tanzania	35.9%	64
Cyprus	49.9%	28	Chile	35.7%	65
Spain	49.5%	29	Vietnam	35.7%	66
China	48.6%	30	Liberia	34.7%	67
Canada	48.4%	31	Oman	34.7%	68
Lebanon	48.3%	32	Portugal	34.6%	69
Eswatini	48.1%	33	Zambia	34.6%	70
Estonia	47.6%	34	Uganda	34.3%	71
Poland	47.2%	35	Indonesia	34.2%	72
Zimbabwe	46.7%	36	Croatia	33.5%	73
Papua New Guinea	46.4%	37	Cote d'Ivoire	33.3%	74

* Participation rate measures the share of the total population who participate in one or more of the three physical activity categories on a regular basis (at least monthly). Table excludes most countries with populations less than 1 million and those with major conflicts or humanitarian crises.

Source: Global Wellness Institute

	Participation Rate*	Rank		Participation Rate*	Rank
Colombia	33.2%	75	Congo, Rep.	27.6%	113
Philippines	32.7%	76	Madagascar	27.6%	114
Tajikistan	32.4%	77	Guinea-Bissau	27.4%	115
Nigeria	32.2%	78	Puerto Rico	27.3%	116
Guatemala	31.9%	79	Tunisia	27.1%	117
Nicaragua	31.8%	80	Armenia	27.0%	118
Equatorial Guinea	31.8%	81	Albania	26.9%	119
Namibia	31.6%	82	Algeria	26.9%	120
El Salvador	31.5%	83	Georgia	26.7%	121
Gabon	31.5%	84	Timor-Leste	26.3%	122
Lesotho	31.4%	85	Macedonia	26.2%	123
Honduras	31.3%	86	Serbia	26.1%	124
South Africa	31.3%	87	Saudi Arabia	26.1%	125
Paraguay	31.3%	88	Belarus	25.7%	126
UAE	31.2%	89	Iran	25.5%	127
Greece	31.1%	90	Bosnia-Herzegov.	25.5%	128
Morocco	30.9%	91	Burkina Faso	25.4%	129
Kyrgyzstan	30.9%	92	Ukraine	25.3%	130
Bolivia	30.8%	93	Bangladesh	25.2%	131
Kenya	30.6%	94	Ethiopia	25.2%	132
Romania	30.6%	95	Bulgaria	25.0%	133
Turkmenistan	30.6%	96	Mali	24.4%	134
Uzbekistan	30.0%	97	Jordan	24.3%	135
Ghana	29.7%	98	Rwanda	24.2%	136
Chad	29.4%	99	Mauritius	24.1%	137
Kazakhstan	29.1%	100	Niger	23.6%	138
Guinea	29.1%	101	Eritrea	23.1%	139
Gambia	28.7%	102	Mauritania	22.0%	140
Egypt	28.6%	103	Cambodia	21.4%	141
Dominican Rep.	28.6%	104	Myanmar	21.3%	142
Libya	28.5%	105	Moldova	20.3%	143
Burundi	28.3%	106	Nepal	20.0%	144
Azerbaijan	28.2%	107	Sri Lanka	19.2%	145
Jamaica	27.9%	108	Sierra Leone	18.9%	146
Benin	27.9%	109	India	15.0%	147
Cameroon	27.9%	110	Haiti	14.0%	148
Senegal	27.9%	110	Pakistan	13.2%	149
Thailand	27.8%	112	Mozambique	13.1%	150

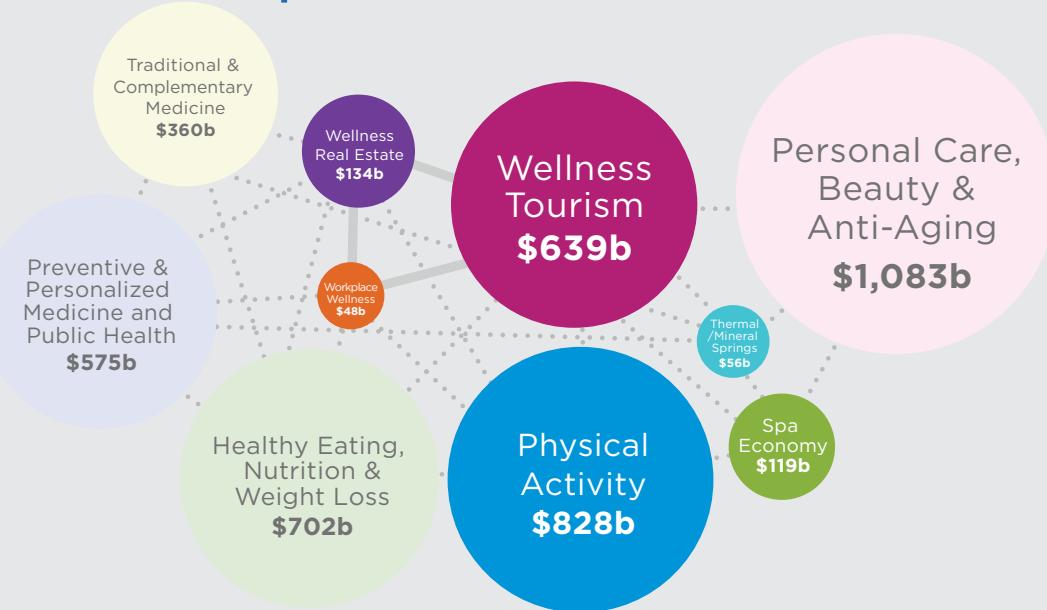
* Participation rate measures the share of the total population who participate in one or more of the three physical activity categories on a regular basis (at least monthly). Table excludes most countries with populations less than 1 million and those with major conflicts or humanitarian crises.

Source: Global Wellness Institute

From *Fitness & Mind-Body* to *Physical Activity*: GWI's New Definition for this Important Wellness Sector

The Global Wellness Institute's (GWI's) most recent *Global Wellness Economy Monitor* estimated the global wellness economy at \$4.2 trillion in 2017. *Fitness & Mind-Body* was one of the ten sectors that comprise the wellness economy and was estimated at \$595 billion in 2017.⁷ In this report, GWI is expanding the definition of this important sector to incorporate a wider range of physical activities – it now includes not only fitness/gym and mind-body (“mindful movement”) activities, but also a variety of other sports and active recreation activities that people engage in as part of being physically active. As such, we have renamed the sector *Physical Activity* and now measure it at \$828 billion in 2018. The difference between the two figures is due to the expanded definition; they should not be compared as a time series because they are measuring different things. **If we incorporate the expanded *Physical Activity* measurement into the wellness economy, wellness becomes a \$4.5 trillion market.** Future editions of GWI's *Global Wellness Economy Monitor* will replace *Fitness & Mind-Body* with the renamed and expanded *Physical Activity* sector.

GLOBAL WELLNESS ECONOMY: \$4.5 Trillion Market



Note: Numbers do not add due to overlap in segments. Dark colored bubbles are the sectors for which GWI conducts in-depth, country-level primary research. Light colored bubbles are sectors for which GWI aggregates global estimates only, drawing from secondary sources.

Source: Global Wellness Institute

⁷ Global Wellness Institute (2018).

The \$368 billion in consumer spending on recreational physical activities does not capture the full extent of global participation.

Worldwide, GWI estimates that 35% of the population participates in recreational physical activities, spending \$367.7 billion out-of-pocket on doing these activities in 2018. Asia-Pacific has the largest expenditures due to its high level of spending in the sports and active recreation category. However, on average Asian consumers spend only \$85 per participant per year on doing physical activities, compared with much higher spending rates in North America (\$544 per year) and Europe (\$256 per year). **The level of spending on recreational physical activities does not represent the level of participation in these activities.** For example, as a region Latin America-Caribbean has a higher participation rate than Asia-Pacific, although its per participant spending is quite a bit lower. Similarly, Sub-Saharan Africa has a participation rate that is just slightly lower than Asia-Pacific, although the per person spending in Africa is only \$12 (as compared to \$85 in Asia). People around the world participate actively in recreational physical activities in a variety of public and free venues (e.g., in public parks and plazas, in neighborhood basketball courts or ball fields, in vacant lots, in the streets, and at home).

Recreational Physical Activities by Region, 2018

	Recreational Physical Activities Market (US\$ billions)				
	Sports & Active Recreation	Fitness	Mindful Movement	TOTAL Market Size* (US\$ billions) (Per Participant)	TOTAL Participation Rate*
Asia-Pacific	\$83.0	\$22.7	\$10.9	\$116.6 (\$85)	33.2%
North America	\$62.4	\$40.5	\$11.4	\$114.3 (\$544)	57.8%
Europe	\$69.2	\$33.8	\$6.3	\$109.2 (\$256)	46.6%
Latin America & Caribbean	\$9.9	\$5.9	\$0.3	\$16.0 (\$67)	36.7%
Middle East & North Africa	\$4.2	\$3.3	\$0.1	\$7.6 (\$61)	25.7%
Sub-Saharan Africa	\$1.4	\$2.5	\$0.03	\$3.9 (\$12)	31.0%
Total Recreational Physical Activities Market	\$230.1	\$108.6	\$29.1	\$367.7 (\$136)	35.5%

* Participation rate measures the share of the total population who participate in one or more of the three physical activity categories on a regular basis (at least monthly). Market size measures consumer expenditures on classes, memberships, entry fees, trainers, and related services and methods of participation.

Note: Figures may not sum to total due to overlap between segments and rounding.

Source: Global Wellness Institute

Sports and active recreation is by far the most popular way for people to engage in recreational physical activities, accounting for \$230.1 billion in spending.

An estimated 33.3% of the world's population regularly engages in sports and active recreation, spending \$90 on average, and accounting for \$230.1 billion of economic activity in 2018. Sports and active recreation represents two-thirds of all recreational physical activity spending, because these activities are the most diverse, accessible, affordable, and prevalent across every region and population group. The top markets include wealthier countries with high participation rates and high average spending per participant, such as the United States, United Kingdom, Japan, Germany, and South Korea, as well as countries with lower participation rates but very high average spending, such as Italy, Canada, and Spain. Several less wealthy countries also rank among the top twenty – notably China, Brazil, Mexico, and India – because they have large populations and, therefore, a large number of participants and overall expenditures, despite lower average spending rates.

Top Twenty Sports & Active Recreation Markets by Market Size, 2018

	Sports & Active Recreation Participation Rate*	Sports & Active Recreation Market Size* (US\$ billions)	Rank in 2018
United States	51.5%	\$57.6	1
China	43.5%	\$42.3	2
United Kingdom	54.1%	\$13.5	3
Japan	66.5%	\$13.3	4
Germany	52.6%	\$12.9	5
South Korea	70.6%	\$10.9	6
France	49.3%	\$7.5	7
Australia	77.4%	\$6.7	8
Italy	33.6%	\$5.7	9
Canada	41.9%	\$4.8	10
Spain	45.8%	\$4.6	11
Switzerland	68.7%	\$4.6	12
Netherlands	60.6%	\$4.0	13
Brazil	36.8%	\$3.7	14
Taiwan	80.7%	\$2.8	15
Russia	57.2%	\$2.6	16
Mexico	43.5%	\$2.3	17
India	12.9%	\$1.8	18
Sweden	72.8%	\$1.7	19
Ireland	62.3%	\$1.4	20

* Participation rate measures the share of the total population who participate in this physical activity category on a regular basis (at least monthly). Market size measures consumer expenditures on classes, memberships, entry fees, trainers, and related services and methods of participation.

Source: Global Wellness Institute

The \$108.6 billion global fitness market is dynamic, diverse, and fast-growing.

GWI estimates that 3.7% of the world's population are members of gyms, health clubs, and fitness studios and/or participate in structured or independent fitness activities or classes on a regular basis. Participants spent \$108.6 billion, or an average of \$384 per participant in 2018. Within the fitness market, GWI estimates that about 190 million people spend money on memberships, classes, and training at commercial gyms, health clubs and fitness studios, accounting for \$83.1 billion in expenditures. Another 58 million or so participate in fitness at venues that often cost much less or nothing, such as public and nonprofit gyms and fitness programs, free outdoor gyms and fitness classes, university fitness centers, etc. Interest in fitness has been growing, with new business models (e.g., luxury fitness, budget gyms, 24-hour gyms, boutique studios, small independent studios, small group training, international and regional franchises, etc.) proliferating around the world to cater to different needs, preferences, and price points.

Top Twenty Fitness Recreation Markets by Market Size, 2018

	Fitness Participation Rate*	Fitness Market Size* (US\$ billions)	Rank in 2018
United States	29.3%	\$37.0	1
United Kingdom	17.3%	\$6.3	2
Germany	16.5%	\$6.1	3
Japan	7.8%	\$5.6	4
China	0.8%	\$5.5	5
Australia	24.3%	\$3.9	6
Canada	26.4%	\$3.5	7
France	12.0%	\$3.1	8
Spain	13.8%	\$2.7	9
Italy	11.0%	\$2.7	10
South Korea	9.2%	\$2.6	11
Brazil	6.2%	\$2.0	12
Mexico	4.3%	\$1.8	13
South Africa	5.1%	\$1.6	14
Netherlands	21.7%	\$1.6	15
Poland	10.0%	\$1.2	16
Switzerland	16.8%	\$1.0	17
India	0.3%	\$1.0	18
Turkey	3.3%	\$1.0	19
Sweden	29.4%	\$1.0	20

* Participation rate measures the share of the total population who are paying members of various types of gym/health club/fitness facilities and/or who access or utilize their services/classes/facilities on a regular basis (at least monthly). Market size measures consumer expenditures on classes, memberships, entry fees, trainers, and related services and methods of participation.

Source: Global Wellness Institute

The \$29.1 billion mindful movement market is concentrated in higher-income countries, but practices are quickly spreading throughout the world.

GWI estimates that 3.8% of the world's population participates in mindful movement activities on a regular basis, with a total spending of \$29.1 billion in 2018. Yoga is the predominant activity, followed by tai chi and qigong, Pilates, barre, and a range of other niche activities that are less mainstream (e.g., Gyrotonic, Feldenkrais, etc.). Worldwide, people participating in mindful movement spent an average of \$101 per year in 2018. The rising popularity of mindful movement practices has been accompanied by a proliferation of ways in which to participate – gyms, independent studios, YMCAs and community centers, streaming apps, books and instructional DVDs, and so on – and this is especially the case with yoga. A significant portion of the growth in yoga practice worldwide is in online, at home, and low-cost methods of practicing, which is expanding access and lowering cost barriers to participation.

Top Twenty Mindful Movement Markets by Market Size, 2018

	Mindful Movement Participation Rate*	Mindful Movement Market Size* (US\$ billions)	Rank in 2018
United States	17.7%	\$10.4	1
China	7.1%	\$5.8	2
Japan	6.3%	\$1.9	3
Russia	1.4%	\$1.3	4
Germany	7.7%	\$1.2	5
Canada	15.3%	\$1.0	6
Australia	17.1%	\$0.9	7
United Kingdom	4.2%	\$0.7	8
India	4.0%	\$0.7	9
South Korea	5.1%	\$0.7	10
Spain	9.5%	\$0.6	11
Italy	4.8%	\$0.5	12
Netherlands	9.7%	\$0.4	13
France	4.7%	\$0.4	14
Taiwan	8.6%	\$0.4	15
Switzerland	5.8%	\$0.2	16
Brazil	1.1%	\$0.2	17
Hong Kong	9.0%	\$0.2	18
Denmark	13.8%	\$0.1	19
Sweden	9.2%	\$0.1	20

* Participation rate measures the share of the total population who participate in this physical activity category on a regular basis (at least monthly). Market size measures consumer expenditures on classes, memberships, entry fees, trainers, and related services and methods of participation.

Source: Global Wellness Institute

Enabling sectors account for \$465.9 billion of the physical activity market.

The physical activity enabling sectors include a wide array goods and services that support or enhance people's participation in recreational physical activities. GWI estimates that the enabling sectors generated \$465.9 billion in global economic activity in 2018, or an average of \$172 per participant. Apparel and footwear is the largest category (\$332.7 billion), followed by equipment and supplies (\$108.6 billion). Technology is the smallest of the enabling sectors, at \$26.3 billion.

North America is the region with the largest market for the enabling sectors (\$171.2 billion) and is also largest in two sub-categories – apparel and footwear, and equipment and supplies. Asia-Pacific is the second-largest market overall (\$125.5 billion) and leads in the technology segment. In every region, expenditures on the enabling sectors (both overall and per participant) are higher than expenditures on actually participating in recreational physical activities. This is primarily due to the high level of spending on apparel and footwear.

Physical Activity Enabling Sectors by Region, 2018

Physical Activity Enabling Sectors Market (US\$ billions)				
	Technology	Equipment & Supplies	Apparel & Footwear	TOTAL Market Size* (US\$ billions) (Per Participant)
North America	\$8.6	\$40.0	\$123.1	\$171.2 (\$814)
Asia-Pacific	\$10.8	\$27.6	\$87.5	\$125.5 (\$92)
Europe	\$4.8	\$35.0	\$77.4	\$116.5 (\$274)
Latin America & Caribbean	\$1.0	\$2.9	\$22.3	\$26.2 (\$110)
Middle East & North Africa	\$0.4	\$2.6	\$12.1	\$15.1 (\$721)
Sub-Saharan Africa	\$0.7	\$0.5	\$10.3	\$11.5 (\$34)
Total Physical Activity Enabling Sectors	\$26.3	\$108.6	\$332.7	\$465.9 (\$172)

Note: Figures do not sum to total due to overlap between segments and rounding.

Source: Global Wellness Institute estimates, based upon data from Euromonitor International, Statista, Crunchbase, and other sources

The physical activity market is expected to enjoy robust growth in the next five years.

For the next five years, GWI projects that the physical activity economy will grow by 6.6% annually, significantly faster than global GDP growth (5.1% annually, as projected by the IMF).

The physical activity economy is projected to surpass \$1.1 trillion, and Asia-Pacific will overtake North America as the largest region by expenditures. Over 40% of the increase in the physical activity market will be in Asia-Pacific region. China and India together are projected to account for nearly one-third of the market growth, while the United States will account for one-quarter of the increase and Europe will account for one-fifth. Around the world, rising concern about obesity and chronic disease and the awareness of their link to inactivity will continue to push governments, nonprofits, medical systems, employers, and consumers to pay more attention to physical activity. In lower- and middle-income countries and regions, demand for exercise opportunities will be fueled by expanding populations and a growing middle class with rising disposable incomes, who are increasingly embracing healthier and more active lifestyles.

Physical Activity Market Growth Projections, 2018-2023

	Projected Market Size (US\$ billions)		Projected Average Annual Growth Rate
	2018	2023	2018-2023
Total Physical Activity Economy	\$828.2	\$1,139.7	6.6%
By Region			
Asia-Pacific	\$240.4	\$373.5	9.2%
North America	\$282.7	\$366.0	5.3%
Europe	\$225.0	\$287.9	5.1%
Latin America-Caribbean	\$42.2	\$56.6	6.0%
Middle East-North Africa	\$22.6	\$33.0	7.8%
Sub-Saharan Africa	\$15.3	\$22.7	8.2%
By Sector			
Active Recreation & Sports	\$230.1	\$323.4	7.0%
Fitness	\$108.6	\$147.9	6.4%
Mindful Movement	\$29.1	\$52.1	12.4%
Apparel & Footwear	\$332.7	\$453.1	6.4%
Equipment & Supplies	\$108.6	\$139.4	5.1%
Technology	\$26.3	\$39.8	8.6%

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

Growth in consumer spending on physical activity will not guarantee increasing participation. Public and private sectors must work together to address the physical inactivity crisis.

The irony in these projections is that ever-increasing consumer spending on physical activity is not necessarily the solution to the global crisis of physical inactivity. From a public health perspective, the aim is simply to get more people more active, more often – regardless of whether they spend more money while doing so. The question we must ask is whether the growth in expenditures reflects more wealthy and able-bodied people (who already have a higher propensity for physical activity) spending more money on the latest fitness fads, gadgets, and apparel? Or does it reflect growing participation rates among people who were not previously physically active? In most countries, the growth projections incorporate both, at varying rates.

We do not have to spend any money at all in order to be physically active and stay healthy, especially when we have access to good parks, recreation, and outdoor amenities, and when we get enough “natural movement” in our daily lives. The world needs more appealing spaces and options for the one-quarter to one-third of adults who are physically inactive (by WHO standards), and for the two-thirds of the population who are not currently participating in recreational physical activities (by GWI’s estimates), in order to engage these people in physical activities they enjoy, at price points that are accessible to them. As such, investment in public infrastructure, parks, outdoor gyms, school programs, physical education, etc. is critically important.

GWI firmly believes that government expenditures on fitness and other recreational physical activities are complementary to the private fitness and recreation industries, and not a competitor or substitute. If the aim is to reduce sedentary behavior and expand access to facilities and services that support physical activity, then both public and private efforts are essential. Physical activity and participation rates are so low in countries around the world, there are enormous opportunities to grow the market and reach new customers – and there is a health imperative to do so. Governments, nonprofits, and private enterprises and entrepreneurs all have a major role to play.

Business innovations and public initiatives can help to overcome barriers to physical activity, mitigate a public health challenge, and expand market opportunities.

The \$828.2 billion global physical activity sector, while enormous, is currently only engaging about one-third of the world's population. The large and growing share of inactive population represents a major ongoing, global public health challenge. The solution lies in addressing the major barriers to physical activity across all spheres of life – transportation, domestic, and occupational physical activity ("natural movement"), as well as leisure and recreation options, and the recreational physical activity sector is a critical part of the solution.

GWI research and review of dozens of national and cross-country surveys revealed the major motivations and barriers to physical activity worldwide. Among adults, the top reasons for not engaging in physical activities are: **lack of time; lack of interest; physical or health conditions; and lack of motivation or habit**. Among youth, the top reasons are: **lack of time, lack of convenient facility or activity near home; not having fun; and prefer to do something else**. Across countries, time constraints are typically a more significant barrier in higher-income countries. In lower-income countries, a lack of interest or motivation and lack of access to facilities are cited more often as barriers. More surprising is that physical conditions (e.g., health-related reasons, illness, age, or the perceived inability to engage in physical activity) are frequently mentioned as a barrier, more so than cost/money constraints or access to facilities. Personal safety and being uncomfortable at a gym are also mentioned as a concern by women and girls in some countries where gender and social norms discourage female participation in sports and outdoor recreation, prevent activities in co-ed settings, or prohibit physical activity for females in general.

Top Barriers to Physical Activity Worldwide	Top Motivations for Physical Activity Worldwide
Adults <ol style="list-style-type: none">1. Lack of time2. Lack of interest3. Physical or health conditions4. Lack of motivation or habit	Adults <ol style="list-style-type: none">1. Maintaining good health2. Stress reduction or relaxation3. For fun or pleasure
Youth <ol style="list-style-type: none">1. Lack of time2. Lack of convenient facility or activity near home3. Not having fun4. Prefer to do something else	Youth <ol style="list-style-type: none">1. For fun, entertainment, or joy of movement2. To be with friends3. To be fit or healthy

Source: Global Wellness Institute review of over 75 studies and surveys across 60 countries

The full report provides numerous examples of innovations, new business models, and public policy initiatives that can help overcome barriers to physical activity, increase participation, and extend the many benefits of movement to more people around the world. These approaches are summarized below.

Mitigating time constraints and increasing convenience. The market has developed many new approaches, services, and businesses to make physical activity more flexible and convenient.

- Apps and digital services are enabling workouts on demand.
- New business models and technologies are revolutionizing the home gym.
- The fitness-hospitality nexus enables people to continue their exercise routines during travel.

Making physical activity a daily habit. As natural movement declines in daily life, there are ways to re-insert movement back into our routine activities and the places where we spend much of our time.

- Workplace wellness initiatives incorporate physical activity into work days.
- New business models are enabling fitness for freelancers.
- Physical education in schools builds lifelong physical activity habits.
- Schools can incorporate movement for children throughout the day.

Making physical activity fun and appealing. Recognizing that consumers are more motivated by fun than by a sense of obligation, businesses and communities have introduced different ways of making physical activity more fun and appealing.

- Build connections with leaders, teams, tribes, and communities.
- Put the “play” back into youth sports.
- Leverage technology to make physical activities fun and rewarding.
- Dance as exercise.

Enabling movement in all physical conditions. The activities and businesses that exist today mainly serve people who are already active or capable of conducting physical activity, leaving out many people whose physical conditions (related to age, medical conditions, disability, injury, etc.) make it difficult for them to participate. There are opportunities to serve this population, who could benefit greatly from physical activities.

- This rise of silver fitness.
- Mainstreaming therapeutic and recovery fitness.
- Prescribing exercise.

Embedding physical activity in the built environment. An important way to engage more people in physical activity is by making movement a default in daily life, through infrastructure, design, and convenient amenities.

- Designing buildings, neighborhoods, and cities to encourage natural movement.
- The rise of wellness real estate.

Making physical activity affordable and accessible to everyone. Accessibility of facilities and affordability remain important barriers to physical activity, especially for people with lower incomes or who live in low-resource areas. Both private businesses and the public sector can play important roles in improving accessibility and lowering cost barriers.

- The growth of high-value, low-price gyms.
- The importance of small business in serving communities.
- Safe and comfortable spaces for women and girls.
- Government investments in infrastructure and programs are critical for improving access.

Research Scope and Methodology

The definitions, conceptual framework, and estimation models for the global economy of physical activity are developed by the authors under the auspices of the Global Wellness Institute (GWI). All data presented in this report are for the year 2018. The analysis and figures are based on extensive primary and secondary research conducted from January 2018 to August 2019, including literature reviews, qualitative and quantitative research, and expert interviews.

Country-level data on physical activity participation rates and expenditures are developed by the authors using our proprietary databases and economic models, cross-referenced with in-house data and research conducted by GWI and the authors for other key wellness industries (e.g., wellness real estate, wellness tourism, workplace wellness, etc.). Key public and private sources consulted include: World Bank, International Monetary Fund, World Health Organization, United Nations, Eurostat, Euromonitor International, Statista, government ministries and statistical agencies, and a wide variety of country-specific and industry-specific organizations, databases, publications, and media sources. Specific resources used to develop different types of data presented in this report are listed below:

- **For physical activity participation rates, motivations, and barriers:** Sports/recreation/physical activity population surveys conducted at the country level by government ministries, public statistical agencies, and nonprofit/academic research institutes (over 330 studies across 94 countries, in 17 languages); regional sports/recreation/physical activity data gathered by the European Union/Eurostat (in 28 EU member countries); WHO STEPwise Approach to Surveillance (STEPS) country reports (conducted in 113 countries); International Health, Racquet, & Sportsclub Association (IHRSA) global and regional reports (covering 65 countries); activity-specific participation studies and data from a variety of research institutes, journal articles, private organizations, media, websites, etc. (e.g., yoga studies conducted by *Yoga Journal* or the German Professional Association of Yoga Teachers/BDY).
- **For physical activity expenditures:** Spending data were gathered from the same sources listed above, as well as consumer expenditures data from Euromonitor International and from national consumer expenditure/household budget surveys conducted on a regular basis by governmental statistical agencies in 67 countries around the world.
- **For physical activity enabling sectors (technology, equipment, apparel):** GWI relied primarily on data from Euromonitor International, Statista, and Crunchbase for these segments, supplemented by numerous industry-specific organizations, publications, websites, and media sources, and GWI's own original research for some technology segments.

GWI's estimates generally do not directly mirror data found in any of the sources listed above, because we have made adjustments to ensure numbers fit our definitions and methodology, and we have used our own estimation models to fill in data for countries not covered by these sources.

Move to be Well: The Global Economy of Physical Activity

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To access the *Move to be Well: The Global Economy of Physical Activity* full report, go to www.globalwellnessinstitute.org.

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