

Asia-Pacific 2019

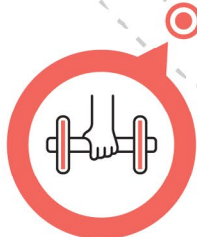


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Move to be Well: The Global Economy of Physical Activity



Equipment
& Supplies



Fitness



Apparel &
Footwear



Sports & Active
Recreation



Mindful
Movement



Technology

Move to be Well: The Global Economy of Physical Activity

ASIA-PACIFIC - OCTOBER 2019



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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.

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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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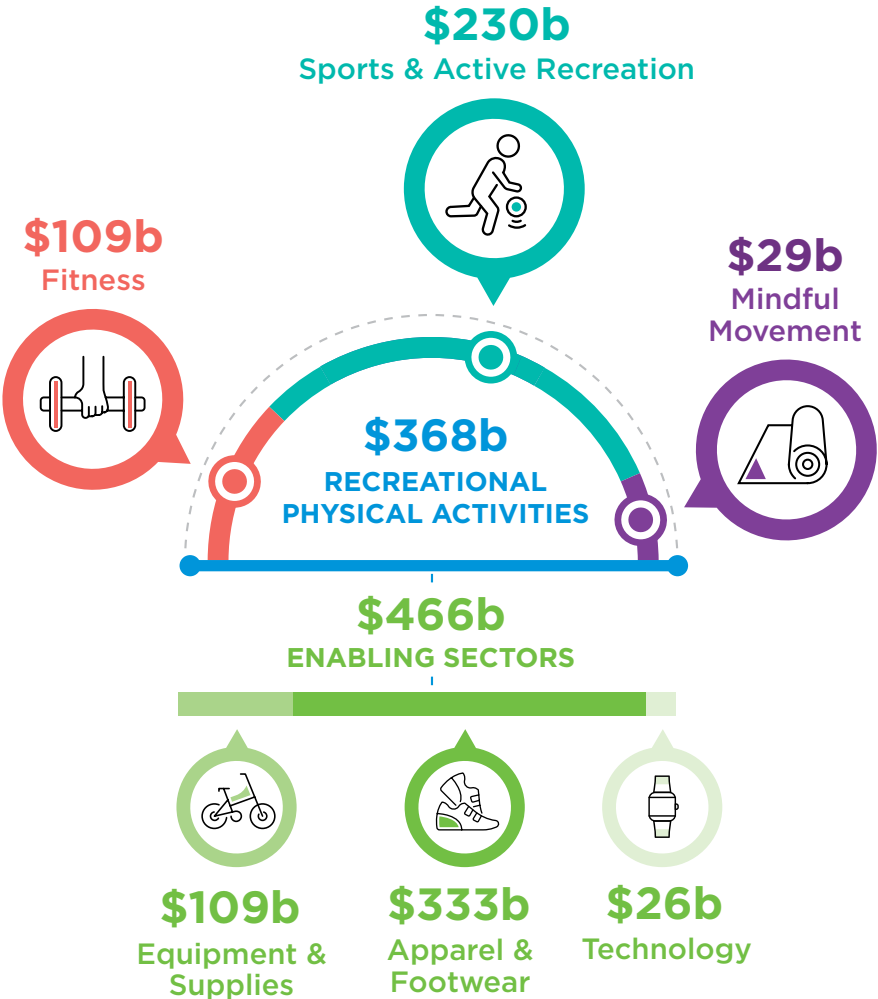
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Global Context

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

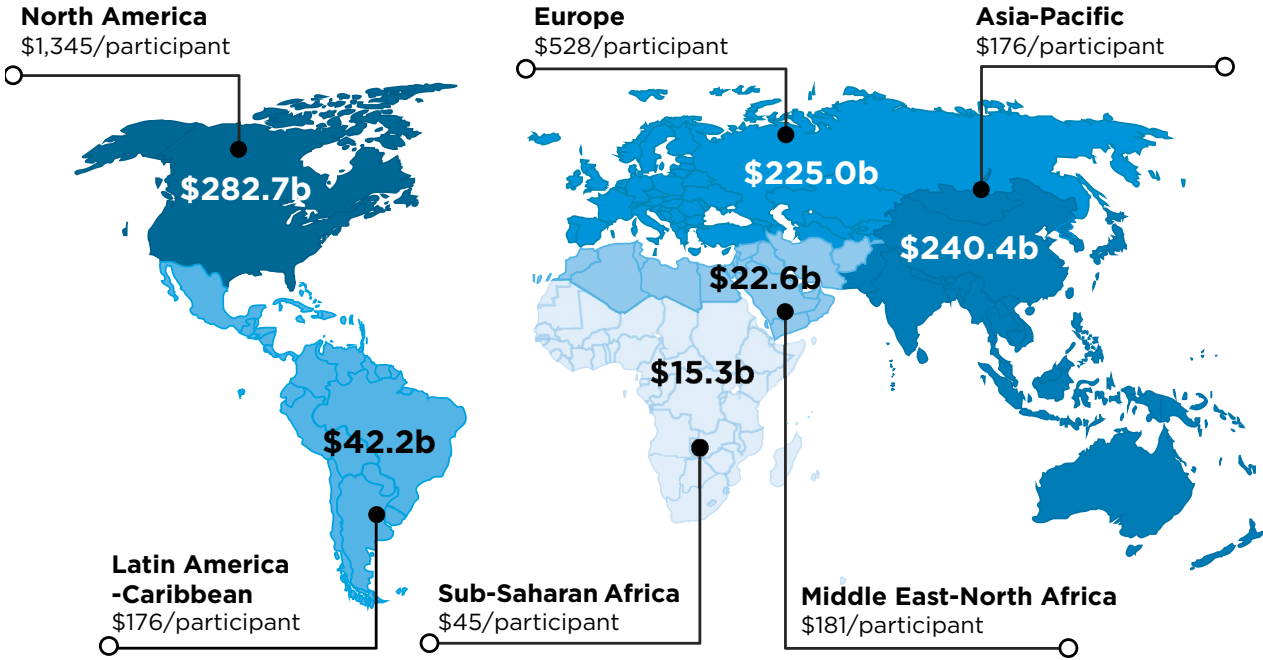


*Note: Numbers do not sum to total due to overlap in segments.
Source: Global Wellness Institute*

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*

Asia-Pacific Highlights

Physical Activity Economy in Asia-Pacific, 2018

	Market Size* Participation Rate* / (US\$ Billions)		Average Spending per Participant
Recreational Physical Activities	33.2%	\$116.6	\$85
Sports & Active Recreation	30.4%	\$83.0	\$66
Fitness	1.1%	\$22.7	\$494
Mindful Movement	4.5%	\$10.9	\$58
Enabling Sectors		\$125.5	\$92
Apparel & Footwear		\$87.5	\$8
Equipment & Supplies		\$27.6	\$20
Technology		\$10.8	\$64
Total Physical Activity Economy in Asia-Pacific		\$240.4	\$176

* Market size measures consumer expenditures on classes, memberships, entry fees, trainers, and related services and methods of participation. 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). Note: Numbers may not sum because of overlap between segments and rounding. Source: Global Wellness Institute

Top Ten Physical Activity Markets in Asia-Pacific, 2018

	Recreational Physical Activities* (US\$ millions)	Enabling Sectors (US\$ billions)			Total Market Size (US\$ millions)
		Technology	Equipment & Supplies	Apparel & Footwear	
China	\$53,560.6	\$6,590.0	\$10,404.6	\$40,115.9	\$109,348.8
Japan	\$20,793.2	\$514.9	\$8,756.0	\$13,981.9	\$43,888.4
South Korea	\$14,246.5	\$383.9	\$1,933.8	\$7,047.1	\$23,463.9
Australia	\$11,448.4	\$326.7	\$1,543.4	\$3,525.1	\$16,730.3
India	\$3,511.6	\$1,820.1	\$381.9	\$7,816.8	\$13,388.1
Taiwan	\$3,691.9	\$269.2	\$2,206.8	\$1,659.4	\$7,730.1
Hong Kong	\$1,404.6	\$84.5	\$348.4	\$2,299.2	\$4,110.1
New Zealand	\$1,720.8	\$46.7	\$278.7	\$997.8	\$3,027.7
Thailand	\$743.7	\$72.9	\$449.5	\$1,646.2	\$2,894.0
Indonesia	\$1,299.9	\$179.9	\$178.0	\$983.7	\$2,611.8

* Measures consumer expenditures on classes, memberships, entry fees, trainers, and related services and methods of participation in three types of recreational physical activities (sports & active recreation, fitness, and mindful movement). Source: Global Wellness Institute

Top Ten Sports & Active Recreation Markets in Asia-Pacific, 2018

	Sports & Active Recreation Participation Rate*	Sports & Active Recreation Market Size* (US\$ millions)
China	43.5%	\$42,281.6
Japan	66.5%	\$13,301.8
South Korea	70.6%	\$10,940.5
Australia	77.4%	\$6,709.1
Taiwan	80.7%	\$2,792.8
India	12.9%	\$1,773.8
New Zealand	79.1%	\$1,134.0
Hong Kong	54.0%	\$787.3
Indonesia	33.7%	\$685.6
Singapore	60.2%	\$607.2

* 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

Top Ten Fitness Markets in Asia-Pacific, 2018

	Fitness Participation Rate*	Fitness Market Size* (US\$ millions)
Japan	7.8%	\$5,554.6
China	0.8%	\$5,525.4
Australia	24.3%	\$3,871.7
South Korea	9.2%	\$2,593.8
India	0.3%	\$1,020.4
Indonesia	0.7%	\$547.3
Taiwan	5.5%	\$522.6
New Zealand	20.0%	\$491.7
Hong Kong	9.3%	\$461.7
Singapore	19.5%	\$429.3

* 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

Top Ten Mindful Movement Markets in Asia-Pacific, 2018

	Mindful Movement Participation Rate*	Mindful Movement Market Size* (US\$ millions)
China	7.1%	\$5,753.7
Japan	6.3%	\$1,936.8
Australia	17.1%	\$867.6
India	4.0%	\$717.4
South Korea	5.1%	\$712.3
Taiwan	8.6%	\$376.5
Hong Kong	9.0%	\$155.6
New Zealand	10.7%	\$95.0
Indonesia	1.7%	\$67.0
Thailand	2.0%	\$45.3

* 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

Asia-Pacific Developments

Asia-Pacific has one of the largest and most diverse physical activity markets in the world.

- Valued at \$240.4 billion, the physical activity market in Asia-Pacific is large, diverse, and dynamic. Buoyed by economic growth, the rising purchasing power of the middle-class, and a growing interest in healthy and active lifestyles, Asia's physical activity economy is fast-growing and increasingly competitive. Consumers in higher-income countries and in the major metropolises keenly follow the latest fitness and recreational trends and offerings – from Europe's running craze to North America's passion for yoga and Pilates, and from spinning and HIIT to martial arts and dance. Meanwhile, Asia's vibrant private sector innovates, imports, improvises, and adapts to meet rising demand with a wide range of business models, including comprehensive luxury gyms, boutique studios, discount gyms, mobile gyms, 24-hour establishments, group exercise, personalized training, aggregators, apps, technology, etc. The growing range of options provides consumers with diverse offerings that include the newest classes, equipment, and technology-enabled services, at every price point. Yoga, Pilates, and other mindful modalities are in high demand, as are sports and recreational activities.
- Not surprisingly, the region is led by China and Japan, which rank second and third globally for the overall size of their physical activity markets. Across the region, physical activity participation varies widely; Australia and New Zealand boast some of the highest participation rates in the world, while South and Southeastern Asian countries lag far behind. As noted earlier, the value of the market is determined by the number of participants and their spending. Importantly, many people in Asia conduct their leisure-time physical activity in public places with little or no spending. For example, exercise in public outdoor gyms is very popular in China, especially among seniors. That is a large reason why the average per participant spending on doing recreational physical activities is \$85 in Asia-Pacific, as compared to \$544 in North America and \$256 in Europe.

Supported by rising consumer demand and government policy, China's physical activity sector is dynamic and fast-growing.

- Estimated at \$109.3 billion by GWI, China's physical activity economy ranks second only to the United States. The sector has grown rapidly over the last decade. The proliferation of health clubs and gyms in Tier 1 cities, alongside the widespread adoption of fitness apps and other online options, has captured wide investor and industry attention. Chinese consumers in the top cities can choose from a variety of large and boutique gyms, a broad array of virtual and online options, and a growing number of sports and recreational facilities and spaces, for pursuits that range from CrossFit, spinning, and tennis to boxing, yoga, and tai chi. Although many of the popular physical activity trends originate in the United States and Europe, both domestic and international enterprises quickly adapt to the preferences of Chinese consumers.
- China's physical activity sector is vast, diverse, and vibrant. While the size of China's fitness/gym market is on par with Japan (both estimated at \$5.5-5.6 billion by GWI), China's fitness participation rate is only 0.8%, compared with much higher rates (from 5-10%) in the rest of East Asia, suggesting significant potential for expansion in second tier cities and other urban areas. Traditional martial arts, with more than a thousand years of history, have lost some luster as young people gravitate toward Western-style "combat fitness."

- Outside of gyms and formal classes, a great number of Chinese exercise in public spaces, both individually and in groups, including in outdoor gyms, informal tai chi groups in parks, group runs, etc. The popularity of “plaza dancing,” practiced by an estimated 100 million women (and some men) who are mostly middle-aged and seniors, has attracted investment in related music and online enterprises. China is also a leading market for fitness technologies, and its fitness wearables market is now the largest in the world (\$4.6 billion according to GWI estimates).
- China’s physical activity sector also benefits from the government’s ongoing efforts to raise awareness about the importance of physical activity, combined with public investments in infrastructure and facilities to increase participation and reduce the disparity of access across regions. In 2016, China announced a National Fitness Plan as part of a comprehensive strategy to improve the general health of Chinese people. The plan laid out ambitious goals of having 700 million engaged in exercise at least once a week, and 435 million exercising regularly, through all types of fitness, sports, and active recreation activities, with the involvement of both the public and private sector. In the past few years, China has made substantial investments in public sports and recreational facilities, outdoor gyms and running paths, as well as in sports programs and promotion campaigns. A separate plan aims to build 3,000 martial arts schools. These efforts have greatly increased the awareness and interest of the Chinese public in physical activity, and they have contributed to rising participation in running, walking, hiking, community sports, and fitness training in the past few years.

Australia and New Zealand have highly active populations, sophisticated fitness markets, and well-developed sports and recreation infrastructure.

- Australians and New Zealanders are very physically active, with sports and active recreation participation rates exceeding 75%, and fitness/gym participation rates exceeding 20%. Consequently, these two countries have the most mature and sophisticated fitness markets in the Asia-Pacific region. They are the source of some of the world’s best-known and innovative brands, including Les Mills (which opened its first club in Auckland in 1968) and Australia-based F45, a franchise built on its 45-minute high-intensity group exercise workout that has quickly expanded to 1,300 facilities globally in just a few years. Both countries also have highly developed fitness professional markets and well-trained instructors, who are supporting a growing market for small group training and personalized training, often favored by middle-aged and senior fitness participants. Increasing demand to address stress and mental wellness is propelling the growth of the mindful movement sector. Adjacent to the private sector, governments in both countries invest in a robust physical activity infrastructure that supports community sports and active recreation among children and youth, as well as low-cost options at publicly-subsidized gyms and community recreational centers.

The East Asian economies and Singapore have relatively mature physical activity markets marked by intense competition and the latest trends.

- Japan, Hong Kong, Taiwan, South Korea, and Singapore all have highly developed and intensely competitive physical activity markets that cater to their sophisticated consumer base. Consumers on the high-end are often early adopters of the latest North American and European fitness modules, classes, equipment, and technologies. All of these markets have experienced steady growth – from internationally branded luxury gyms to small independent studios – spurred by strong purchasing power, population aging, and rising interest in healthier and more active lifestyles. In addition to a full range of private operators, consumers in Singapore and Japan also have access to a large number of public facilities that offer lower-cost fitness, sports, and recreation activities. In Japan, public facilities account for half of the nation’s gyms, and they are supplemented with facilities in schools and universities that are accessible to the public. In South Korea, Hong Kong, and Taiwan, outdoor recreation activities such as running, walking and hiking, and exercising in parks and squares remain popular, despite the growing memberships in gyms and fitness studios, underlying the ongoing importance of public infrastructure.
- Governments in these countries are also active in promoting physical activity through public education campaigns (e.g., South Korea’s Program 7330 and Singapore’s Active Health program). Steady government investment has been supporting the development, diversification, and upgrading of active recreation infrastructure in all of these markets, especially to serve an aging population. Japan has been at the forefront of these efforts; currently, adults over 50 make up 50% of Japan’s gym users, and senior gym memberships are growing. Concern over rising healthcare costs has led the government to intensify its efforts on improving physical activity among seniors, working with communities and the private sector to motivate seniors to be active, and to increase access to facilities and programs. An example is a major national project in Japan that will promote better health among seniors through “fun” walking. Facing similar demographic trends, the Taiwan and South Korean governments are also working to keep their aging citizens physically active (e.g., Exercise for Health, a public-private partnership in Taiwan).

South and Southeast Asian nations have lower levels of physical activity; however, rising incomes and growing health consciousness are stimulating demand.

- Southeast Asian countries, such as Malaysia, Thailand, Philippines, and Indonesia, have smaller physical activity sectors, lower levels of physical activity participation, and the lowest fitness industry penetration rates in the region. Generally, young professional and urban elites in major cities, such as Bangkok, Kuala Lumpur, Jakarta, and Manila, have access to a variety of fitness offerings, including large comprehensive gyms, small independent studios, start-of-the-art equipment, group classes, and personalized training. Across the board, rising obesity and chronic disease related to urbanization and unhealthy lifestyles have been driving demand for fitness. Generally, the urban infrastructure in these countries for an active lifestyle (public parks, jogging trails, bike paths, recreational facilities, etc.) is not well-developed. Outside major cities, the infrastructure for recreational physical activity – both private and public facilities – is even more limited. The vast majority of the population lacks access to sports and recreational facilities and has limited knowledge about the importance of exercise. To the extent that physical activity is supported in schools, the emphasis is often preparing the best athletes for competition rather than encouraging physical activity for all. Several country governments have launched media campaigns (e.g., Fit Malaysia) to encourage physical activity, while also making investments to improve public infrastructure and facilities. The government of the Philippines is especially motivated to improve public awareness, as it is the host of the 2019 Southeast Asian Games. Rising incomes from a growing middle class and emerging government initiatives targeting the health and physical activity of citizens will continue to fuel the growth of the physical activity sector in these markets.
- Despite very low rates of participation, India has a sizable physical activity economy, valued at \$13.4 billion, due to its sheer population size. In the top metro areas such as Mumbai, Delhi, and Bangalore, high-income urban professionals and a growing middle class drive the growth of comprehensive gyms and fitness clubs. However, the industry is mostly dominated by small, independent, low-cost fitness clubs that cater to consumers at much lower price points. Overall, the country lacks physical activity infrastructure, especially outdoor active recreation venues in cities. But this is changing. Since 2016, members of parliament have used local development funds to install 1,700 open-air gyms in parks throughout In Delhi (at approximately \$10,000 each), and hundreds more are being planned.¹ Similar to India, Pakistan’s physical activity sector is small compared to its population size, with very low levels of participation, limited public awareness about the health benefits of exercise, and an undeveloped infrastructure throughout the country. In both markets, female participation in physical activity, especially in sports and active recreation, has been hampered by cultural and religious beliefs; however, attitudes are changing, especially among the urban and educated elites, and women’s and girls’ participation in recreational physical activity is growing.

¹ See: 1) Manohar, M. and Singh, P. (2018, Aug.22). New Delhi: Open gyms make fitness a mass exercise. *Times of India*. <https://timesofindia.indiatimes.com/city/delhi/open-gyms-make-fitness-a-mass-exercise/articleshow/65507526.cms>.

Asia is the source of the most important mindful movement modalities in the world, now widely adopted for their mental and physical health benefits.

- Tai chi is an ancient form of martial arts in China that was codified into a structured exercise by various martial arts schools and later by the Chinese government (Chinese Sports Committee) in the 1950s. Tai chi has long been practiced by the Chinese (including those in Taiwan and Hong Kong) in public places, and is often taught informally when groups gather to exercise in parks or public squares as an early morning ritual. Because the movements are slow, gentle, and deliberate, with a focus on breathing and balance, it is often favored by the elderly. Tai chi has enjoyed a resurgence around the world along with other mindful movement modalities, and it has developed a large following in Asian countries such as Japan and Thailand, and to a lesser extent in Europe and North America. Its various benefits can include: reducing fall risks; improving energy and stamina; increasing flexibility, balance, and agility; decreasing stress, anxiety, and depression; improving mood; improving muscle strength and definition; improving aerobic capacity; etc. As such, tai chi is now often incorporated in the group class offerings at private gyms and public recreational centers around the world, and is sometimes combined with yoga and Pilates movements in exercise classes that target senior populations.
- Similarly, yoga has deep and ancient roots in India and has been practiced as part of the Hindu religion. However, its current and most popularized form was born in the United States, where yoga was coopted into the fitness industry as a flexible (from mild to rigorous) form of exercise that includes a mindful component. The agnostic and often athletic forms of yoga have become a global phenomenon that is generating its own fitness subsector and related fashion, while influencing food, décor, jewelry, and lifestyle. Asian consumers, including a growing number in India, have now fully embraced the Western style of practicing yoga at gyms, boutique studios, community centers, parks, and other outdoor venues, and using online sources. Although still dominated by younger, more educated, and affluent women, men and older exercisers have begun to join in. Young Chinese women from Shanghai to Hong Kong prefer yoga to tai chi. The growth of yoga has outpaced all other fitness activities in Australia. Over the past few years, India has reasserted its dominance as the birthplace of yoga. The Indian government has instituted yoga practice among children and youth at schools, and it proposed an International Day of Yoga (June 21) which was adopted by the United Nations General Assembly in 2014.

Consumer enthusiasm and tech-savviness make Asia the largest market in the world for physical activity technologies.

- Valued at \$10.8 billion, the physical activity technology sector in Asia is the largest across all regions, mainly because of its vast market for fitness wearables and trackers. All across Asia-Pacific, consumers are eager and enthusiastic adopters of the latest technologies and gadgets (wearables, virtual reality, new platforms and applications, etc.) that enhance their gym, recreation, or home exercise experiences. Meanwhile, established and emerging technology companies in many Asian countries (e.g., Samsung, Sony, Huawei, Xiaomi, Codoon, Lerbyee, Honor, GOQii ViTAL, Fastrack, etc.) are creating new products and services to enhance consumer experiences, making exercise more exciting, social, and accessible, and linking physical activity to health metrics. China is by far the regional leader, with a \$6.6 billion physical activity technology market. Fitness apps are wildly popular in China, where an estimated 68.5 million people actively use apps and online platforms to support their fitness and healthy lifestyles (from walking, running, and fitness to *guangchang wu*, cycling, and yoga).² China has its own massive Chinese-language industry of apps and streaming services, and it is home to some of the world's largest apps for streaming workouts, such as Keep, Daily Yoga, and Hotbody.³
- On the content side, global trends and fitness innovations are quickly incorporated into new offerings such as online classes, virtual personal coaching, and personalized workouts, while entrepreneurs are developing apps, platforms, and intermediaries to bring new services and offerings to an expanding market. Certain forms of fitness technology, for example online fitness videos in Hong Kong and gamification in South Korea and Australia, have found a highly receptive audience. In Japan, Konami Sports has used its prowess in online gaming to gain success in the fitness technology market; as the creators of *Dance Dance Revolution*, Konami helped launch the exergaming industry in the 1990s. Even in less mature physical activity markets such as Indonesia, Philippines, and Thailand, consumers have rapidly adopted mobile apps, online platforms, and wearables. Social media influencers help to motivate young exercisers and to shape demand across the region. In a way, the dynamic and fast-growing physical activity technology market is helping to fill the void of an inadequate physical infrastructure in many parts of Asia.

² See: 2) Zheng, Y. (2018, Oct. 30). Online fitness platforms grow in popularity among the young. The Telegraph. <https://www.telegraph.co.uk/china-watch/sport/online-fitness-platforms-in-china/>. 2) Xuan, L. (2018, Dec. 14). Fitness industry works up a sweat in internet age. China Daily. http://www.chinadaily.com.cn/a/201812/14/WS5c12edf0a310eff303290eea_1.html.

³ Borak, M. (2017, June 12). Top 7 fitness apps in China. Technode. <https://technode.com/2017/06/12/top-7-fitness-apps-in-china/>.

Move to be Well:
The Global Economy of Physical Activity

Executive Summary

OCTOBER 2019



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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.

¹ Ng, S.W., and Popkin, B.M. (2012). Time use and physical activity: a shift away from movement across the globe. *Obesity Reviews* 13(8), 659-680. <https://doi.org/10.1111/j.1467-789X.2011.00982.x>.

² Guthold, R. et al (2018, Sept. 4). Worldwide trends in insufficient physical activity from 2001 to 2016: a pooled analysis of 358 population-based surveys with 1.9 million participants. *The Lancet Global Health* 6, e1077-1086. [https://doi.org/10.1016/S2214-109X\(18\)30357-7](https://doi.org/10.1016/S2214-109X(18)30357-7).

³ Hallal, P.C., et al (2012, July 18). Global physical activity levels: surveillance progress, pitfalls, and prospects. *The Lancet* 380, 247-257. [https://doi.org/10.1016/S0140-6736\(12\)60646-1](https://doi.org/10.1016/S0140-6736(12)60646-1).

⁴ Kohl, H.W., et al (2012, July 18). The pandemic of physical inactivity: global action for public health. *The Lancet* 380, 294-305. [https://doi.org/10.1016/S0140-6736\(12\)60898-8](https://doi.org/10.1016/S0140-6736(12)60898-8).

⁵ IHRSA (2019). *2019 IHRSA Global Report: The State of the Health Club Industry*. <https://www.ihrsa.org/publications/the-2019-ihrsa-global-report/>. 2007 figures obtained from: <https://www.snewsnet.com/press-release/ihrsa-releases-2008-ihrsa-global-report-the-state-of-the-health-club-industry>.

⁶ Global Wellness Institute (2018). *Global Wellness Economy Monitor*. <https://globalwellnessinstitute.org/industry-research/>.

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?

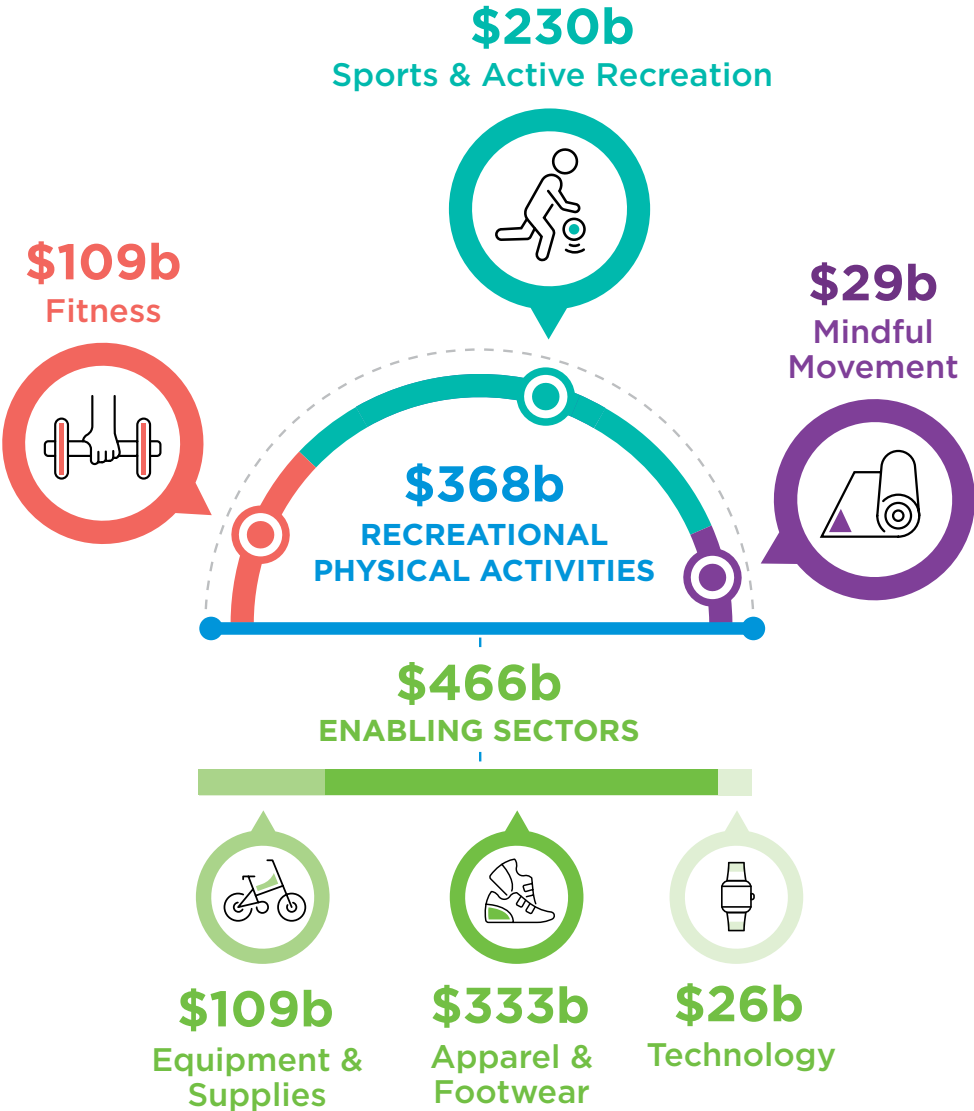
Physical activity is not only something that we do for our health, but also generates significant economic activity. Expenditures on leisure-time fitness, exercise, and active recreation represent a growing household spending line item, providing business and innovation opportunities for entrepreneurs 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

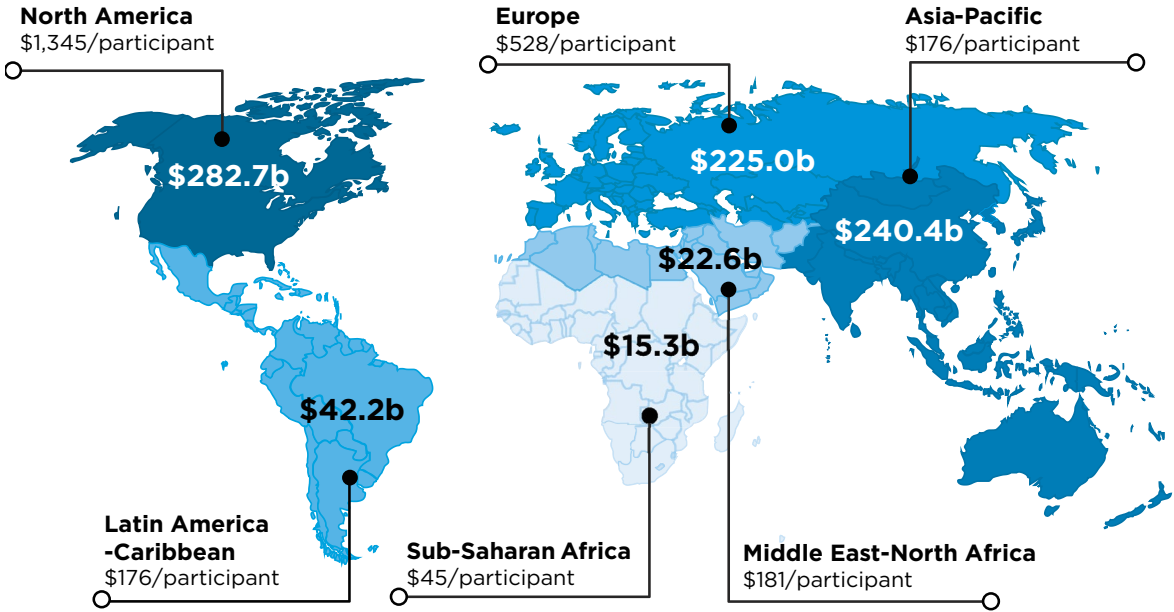


*Note: Numbers do not sum to total due to overlap in segments.
Source: Global Wellness Institute*

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

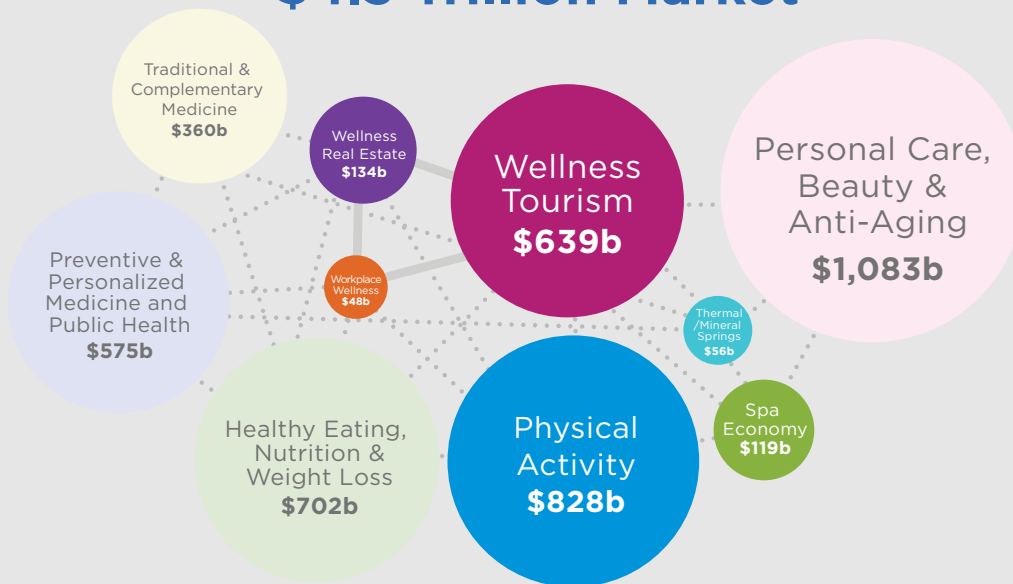
* Participation rate measures the share of the total population who participate in one or more of the three physical activity categories on a regular basis (at least monthly). Table excludes most countries with populations less than 1 million and those with major conflicts or humanitarian crises.

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.

GWII 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, GWII 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 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.

GWII 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 (\$121)
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 of 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
<p>Adults</p> <ol style="list-style-type: none"> 1. Lack of time 2. Lack of interest 3. Physical or health conditions 4. Lack of motivation or habit 	<p>Adults</p> <ol style="list-style-type: none"> 1. Maintaining good health 2. Stress reduction or relaxation 3. For fun or pleasure
<p>Youth</p> <ol style="list-style-type: none"> 1. Lack of time 2. Lack of convenient facility or activity near home 3. Not having fun 4. Prefer to do something else 	<p>Youth</p> <ol style="list-style-type: none"> 1. For fun, entertainment, or joy of movement 2. To be with friends 3. 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.

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