



**GLOBAL WELLNESS
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FEBRUARY 2023

The Global Wellness Economy: Indonesia



The Global Wellness Economy: INDONESIA

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ABOUT THE AUTHORS

ABOUT THE GLOBAL WELLNESS INSTITUTE

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

www.globalwellnessinstitute.org

ABOUT THE AUTHORS

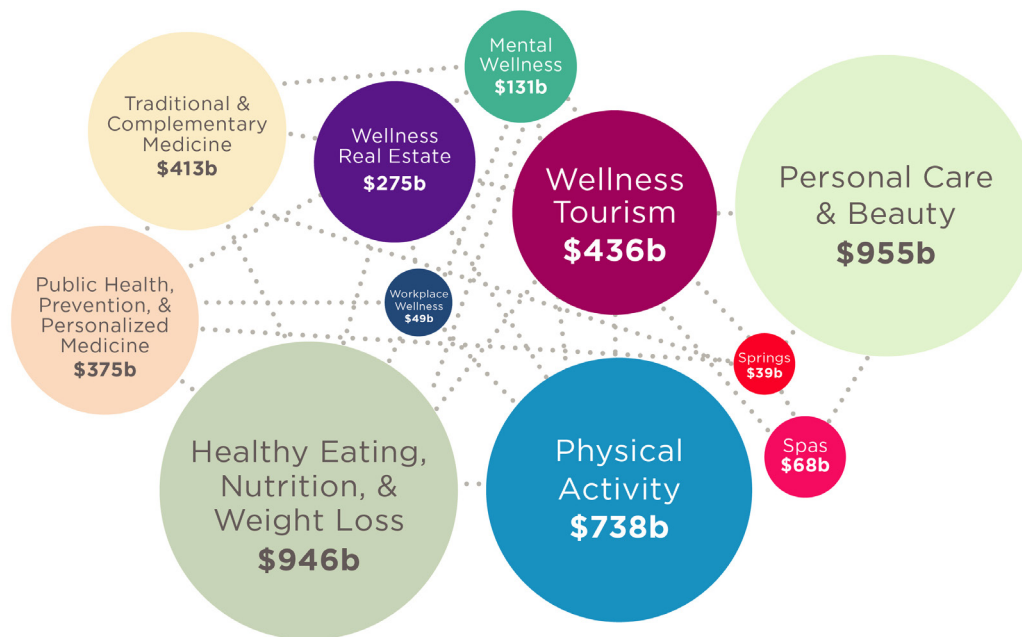
The Global Wellness Economy: Indonesia was prepared by Ophelia Yeung and Katherine Johnston, with assistance from Tonia Callender. As Senior Research Fellows at the Global Wellness Institute, Ms. Yeung and Ms. Johnston bring decades of research and strategy experience in the public and private sectors to pioneer groundbreaking methodologies in measuring the size of the global wellness economy and its subsectors. Ms. Callender, Research Fellow, contributed research expertise in multiple wellness sectors.

I. THE GLOBAL WELLNESS ECONOMY

The Global Wellness Institute (GWI) defines wellness as **the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health**. According to this definition, wellness is not a passive state, but rather an “active pursuit” that is associated with intentions, choices, and actions. Wellness also extends beyond physical health and incorporates many dimensions, including the physical, mental, emotional, spiritual, social, and environmental dimensions.

The wellness economy encompasses **industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives**. We estimate that the global wellness economy grew from \$4.3 trillion¹ in 2017 to \$4.9 trillion in 2019, or by 6.6% annually, a growth rate significantly higher than global economic growth (4.0%).² In 2020, the wellness economy fell by 11.0%, to \$4.4 trillion (while global GDP declined by 2.8%).

GLOBAL WELLNESS ECONOMY: \$4.4 trillion in 2020



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



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

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

In 2020, Asia-Pacific had the largest regional wellness market (\$1.5 trillion), followed by North America (\$1.3 trillion) and Europe (\$1.1 trillion). Together, these three regions account for 90% of the entire global wellness economy.

Asia-Pacific was also one of the fastest-growing wellness markets from 2017-2019 (8.1% annual growth), and it shrank the least during the pandemic (-6.4% from 2019-2020). Asia-Pacific's wellness economy was buffered during COVID-19 by very high growth rates in a couple of key sectors (*wellness real estate* and *public health, prevention, & personalized medicine*), and because it saw a smaller decline than other regions in the *physical activity* and *personal care & beauty* sectors.³ In addition, many Asian countries were better able to contain the pandemic and/or had business restrictions that were less severe or more intermittent in 2020.

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

Wellness Economy by Region, 2017, 2019, 2020

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

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

³For detailed data on individual wellness economy sectors by region, see the companion GWI Report: Yeung, O. and Johnston, K. (2021). *The Global Wellness Economy: Looking Beyond Covid*. Miami, FL: Global Wellness Institute. <https://globalwellnessinstitute.org/industry-research/the-global-wellness-economy-looking-beyond-covid/>.

Research Methodology and Scope

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

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

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

For more details on the data presented in this report, including global/regional data and sectoral breakdowns, see the companion GWI reports:

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

***The Global Wellness Economy: Country Rankings (2022)*, <https://globalwellnessinstitute.org/industry-research/2022-global-wellness-economy-country-rankings/>**

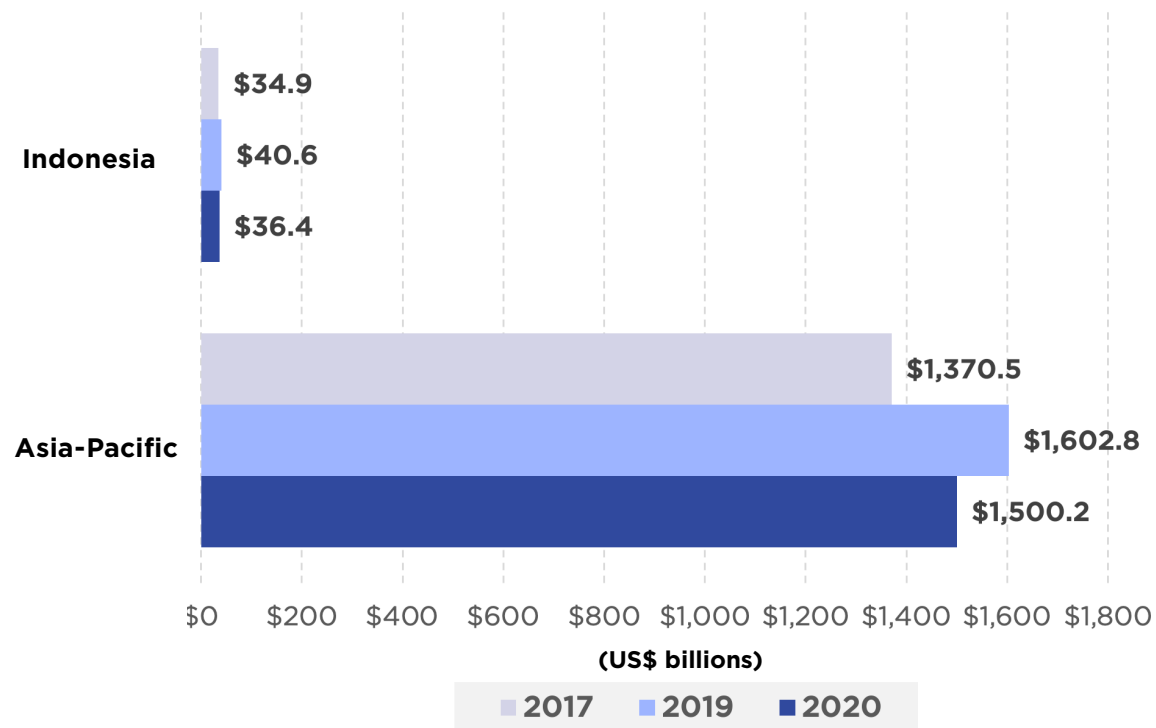
II. WELLNESS ECONOMY IN INDONESIA

Wellness Economy Top Line Data for Indonesia, 2017, 2019, 2020

	2017	2019	2020
Wellness Economy (US\$ billions)	\$34.9	\$40.6	\$36.4
Wellness Economy Regional Ranking <i>(out of 45 countries in Asia-Pacific)</i>	#7	#7	#7
Wellness Economy Global Ranking <i>(out of 218 countries worldwide)</i>	#21	#18	#19
Wellness Economy Per Capita (US\$)	\$132	\$150	\$133
Wellness Economy as a % of Country GDP	3.44%	3.63%	3.44%

Note: Figures for the eleven sectors shown on the following pages do not sum to the country total due to overlap in sectors. Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, October 2021 Edition (GDP data); World Bank World Development Indicators (population data).

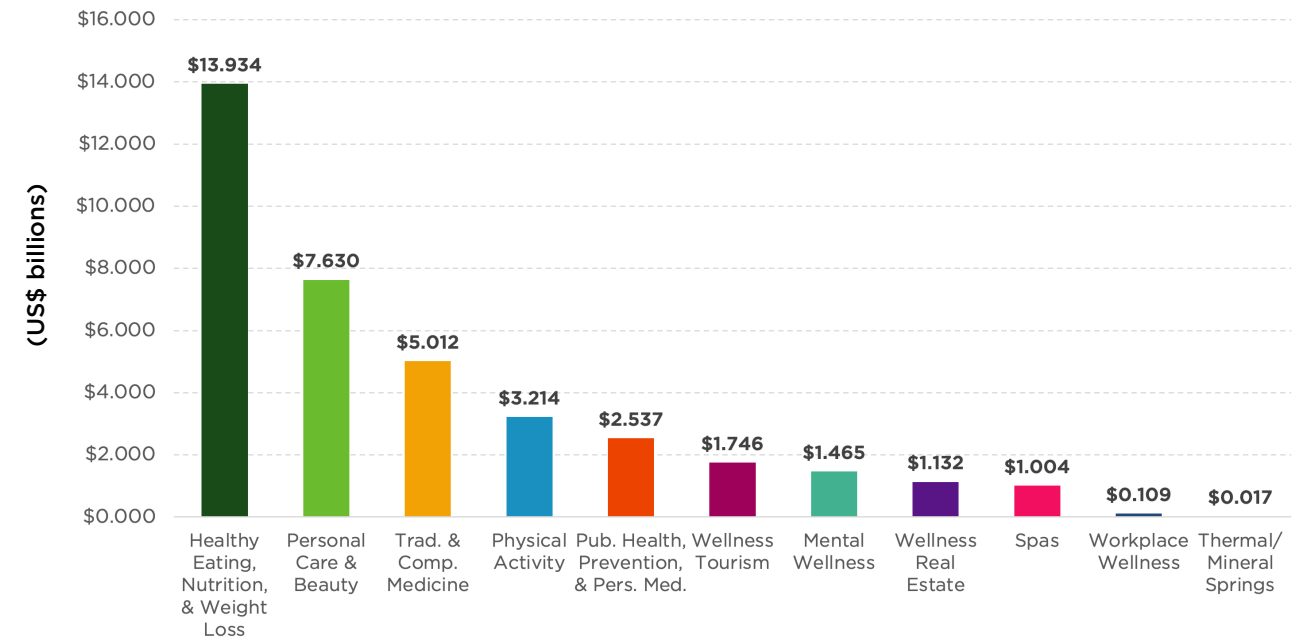
Wellness Economy: Indonesia and Asia-Pacific (2017-2020)



Source: Global Wellness Institute

III. WELLNESS ECONOMY SECTORS IN INDONESIA

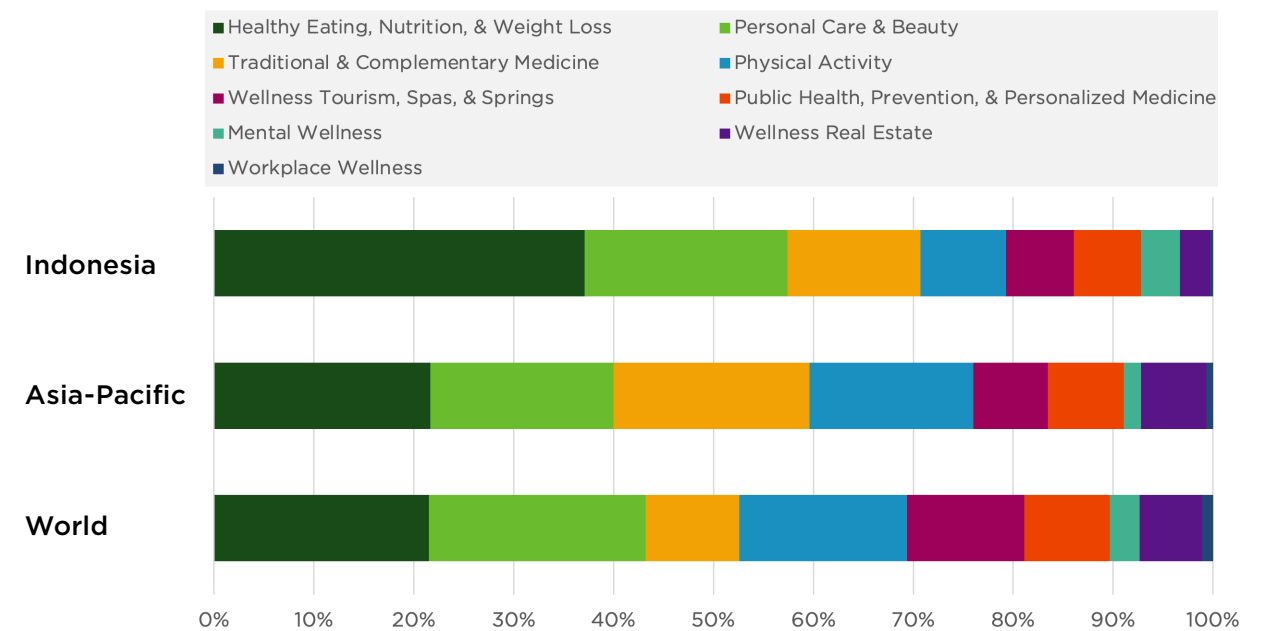
Indonesia: Wellness Economy Sectors (2020)



Source: Global Wellness Institute

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

Composition of the Wellness Economy (2020)



Source: Global Wellness Institute

Wellness Economy Sectors in Indonesia, 2017, 2019, 2020

	Market Size (US\$ millions)			Average Annual Growth Rate	
	2017	2019	2020	2017-2019	2019-2020
Healthy Eating, Nutrition, & Weight Loss	\$12,447.8	\$13,441.0	\$13,934.5 <i>Rank: #14</i>	3.9%	3.7%
Personal Care & Beauty	\$7,448.2	\$7,977.1	\$7,629.6 <i>Rank: #23</i>	3.5%	-4.4%
Traditional & Complementary Medicine	\$4,764.1	\$5,364.8	\$5,011.9 <i>Rank: #12</i>	6.1%	-6.6%
Physical Activity	\$2,566.2	\$3,516.3	\$3,214.2 <i>Rank: #27</i>	17.1%	-8.6%
Public Health, Prevention, & Personalized Medicine	\$2,482.2	\$2,484.5	\$2,536.6 <i>Rank: #17</i>	0.0%	2.1%
Wellness Tourism	\$3,281.0	\$5,005.6	\$1,745.7 <i>Rank: #30</i>	23.5%	-65.1%
Mental Wellness	N/A	\$1,426.6	\$1,465.3 <i>Rank: #13</i>	N/A	2.7%
Wellness Real Estate	\$696.4	\$957.6	\$1,131.7 <i>Rank: #22</i>	17.3%	18.2%
Spas	\$1,299.0	\$1,764.9	\$1,004.2 <i>Rank: #17</i>	16.6%	-43.1%
Workplace Wellness	\$104.0	\$115.4	\$108.6 <i>Rank: #43</i>	5.3%	-5.9%
Thermal/Mineral Springs	\$22.9	\$30.2	\$17.0 <i>Rank: #56</i>	14.7%	-43.5%
Wellness Economy	\$34,915.1	\$40,622.7	\$36,432.0 <i>Rank: #19</i>	7.9%	-10.3%

Note: Figures do not sum to total due to overlap in segments. Rankings are out of 218 countries worldwide. Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

IV. DETAILS FOR SELECTED WELLNESS ECONOMY SECTORS IN INDONESIA



Wellness Real Estate

Wellness Real Estate Market in Indonesia: 2017, 2019, 2020

	Market Size (US\$ millions)			Average Annual Growth Rate	
	2017	2019	2020	2017-2019	2019-2020
Total Construction Output	\$278,573.1	\$322,531.3	\$311,887.7	7.6%	-3.3%
Wellness Real Estate	\$696.4	\$957.6	\$1,131.7	17.3%	18.2%
<i>Percent of Construction Output with a Wellness Focus</i>	0.25%	0.30%	0.36%	N/A	N/A

Source: Global Wellness Institute, based on construction output data from the United Nations.



Physical Activity

Physical Activity Market by Subsector in Indonesia: 2018, 2019, 2020

	Market Size (US\$ millions)			Average Annual Growth Rate	
	2018	2019	2020	2018-2019	2019-2020
Recreational Physical Activity	\$1,299.9	\$1,660.5	\$1,444.2	27.7%	-13.0%
Sports & Active Recreation	\$685.6	\$734.8	\$696.3	7.2%	-5.2%
Fitness	\$547.3	\$848.6	\$671.8	55.1%	-20.8%
Mindful Movement	\$67.0	\$77.0	\$76.2	14.9%	-1.1%
Enabling Sectors	\$1,775.9	\$2,034.4	\$2,064.9	14.6%	1.5%
Fitness Technology	\$712.7	\$858.5	\$1,209.5	20.5%	40.9%
Sports & Fitness Equipment	\$988.8	\$1,098.3	\$781.7	11.1%	-28.8%
Sports Apparel & Footwear	\$74.7	\$77.9	\$74.0	4.3%	-5.0%
TOTAL	\$3,046.8	\$3,516.3	\$3,214.2	15.4%	-8.6%

Note: Figures do not sum to total due to overlap in segments and rounding. See Appendix for detailed descriptions of the subsectors. Source: Global Wellness Institute.



Healthy Eating, Nutrition, & Weight Loss

Healthy Eating, Nutrition, & Weight Loss Market by Subsector in Indonesia: 2017, 2019, 2020

	Market Size (US\$ millions)			Average Annual Growth Rate	
	2017	2019	2020	2017-2019	2019-2020
Healthy-Labeled Foods & Beverages	\$10,034.2	\$10,816.1	\$11,237.2	3.8%	3.9%
Vitamins & Supplements	\$1,639.8	\$1,834.7	\$2,000.4	5.8%	9.0%
Weight Loss Products & Services	\$773.8	\$790.2	\$696.9	1.1%	-11.8%
TOTAL	\$12,447.8	\$13,441.0	\$13,934.5	3.9%	3.7%

Note: Figures may not sum to total due to rounding. See Appendix for detailed descriptions of the subsectors.
Source: Global Wellness Institute, based on data from Euromonitor, IBISWorld, and other sources.



Mental Wellness

Mental Wellness Market by Subsector in Indonesia: 2017, 2019, 2020

	Market Size (US\$ millions)			Average Annual Growth Rate	
	2017	2019	2020	2017-2019	2019-2020
Brain-Boosting Nutraceuticals & Botanicals	N/A	\$1,179.2	\$1,196.6	N/A	1.5%
Senses, Spaces, & Sleep	N/A	\$168.1	\$191.8	N/A	14.1%
Self-Improvement	N/A	\$72.7	\$68.9	N/A	-5.3%
Meditation & Mindfulness	N/A	\$6.5	\$8.0	N/A	22.8%
TOTAL	N/A	\$1,426.6	\$1,465.3	N/A	2.7%

Note: Figures may not sum to total due to rounding. See Appendix for detailed descriptions of the subsectors.
Source: Global Wellness Institute, based on data from Euromonitor, Arcview/BDSA, ICF, NCCIH, and other sources.



Traditional & Complementary Medicine

Traditional & Complementary Medicine Market by Subsector in Indonesia: 2017, 2019, 2020

	Market Size (US\$ millions)			Average Annual Growth Rate	
	2017	2019	2020	2017-2019	2019-2020
T&CM Services & Practitioners	\$3,969.8	\$4,465.3	\$4,061.8	6.1%	-9.0%
T&CM Medicines & Products	\$794.3	\$899.5	\$950.1	6.4%	5.6%
TOTAL	\$4,764.1	\$5,364.8	\$5,011.9	6.1%	-6.6%

Note: Figures may not sum to total due to rounding.
Source: Global Wellness Institute, based on data from Euromonitor, IBISWorld, and various national sources.



Public Health, Prevention, & Personalized Medicine

Public Health, Prevention, & Personalized Medicine Market by Subsector in Indonesia: 2017, 2019, 2020

	Market Size (US\$ millions)			Average Annual Growth Rate	
	2017	2019	2020*	2017-2019	2019-2020
Public Health & Prevention	\$2,428.1	\$2,412.5	\$2,457.7	-0.3%	1.9%
Personalized Medicine	\$54.1	\$71.9	\$78.8	15.3%	9.6%
TOTAL	\$2,482.2	\$2,484.5	\$2,536.6	0.05%	2.1%

* 2020 figures are preliminary estimates based upon currently available data and are subject to revision, as full details on 2020 health expenditures are not yet available in most countries.
Note: Figures may not sum to total due to rounding.
Source: Global Wellness Institute, based on data from the WHO, OECD, Altarum, IBISWorld, and other sources.



Thermal/Mineral Springs

Thermal/Mineral Springs Establishments and Revenues in Indonesia: 2017, 2019, 2020

	Thermal/Mineral Springs Commercial Establishments			Average Annual Growth Rate	
	2017	2019	2020*	2017-2019	2019-2020
Thermal/Mineral Springs Establishments	46	52	52	6.3%	0.0%
Thermal/Mineral Springs Revenues (US\$ millions)	\$22.9	\$30.2	\$17.0	14.7%	-43.5%

* 2020 figures are preliminary estimates based upon currently available data, and are subject to revision, as 2020 data are not yet available in some countries that publish data on this sector. See Appendix for detailed thermal/mineral springs definitions and descriptions. Source: Global Wellness Institute.



Spas

Spa Establishments and Revenues by Type in Indonesia: 2017, 2019, 2020

	Spa Revenues (US\$ millions)			Number of Spas		
	2017	2019*	2020*	2017	2019*	2020*
Hotel/Resort Spas**	\$1,031.4	\$1,420.1	\$799.6	1,542	1,819	1,819
Other Spas	\$121.3	\$152.7	\$91.4	866	934	834
Destination Spas & Health Resorts	\$75.0	\$102.1	\$59.1	30	35	36
Day/Club/Salon Spas	\$67.9	\$85.5	\$51.4	244	263	234
Thermal/Mineral Springs Spas	\$1.8	\$2.7	\$1.5	7	8	8
Medical Spas	\$1.5	\$1.9	\$1.1	3	3	3
TOTAL	\$1,299.0	\$1,764.9	\$1,004.2	2,692	3,062	2,934

*The large increase in number of spas and spa revenues in 2019 is not entirely due to new builds, but also due to a dramatic increase in the number of hotel/resorts listing themselves and their spa facilities/services on global online booking sites, especially in emerging market countries. The 2020 figures are preliminary estimates by GWI, based upon currently available data.

**The number of hotel/resort spas stays the same from 2019-2020 because we currently have no basis for determining whether there were any permanent closures in 2020. Note: Figures may not sum to total due to rounding. See Appendix for descriptions of the spa categories. Source: Global Wellness Institute.



Wellness Tourism

Domestic and Inbound Wellness Tourism Trips and Expenditures in Indonesia: 2017, 2019, 2020

	Domestic and Inbound Wellness Trips			Average Expenditures Per Trip
	2017	2019	2020	2020
Domestic				
Domestic Wellness Trips (millions)	3.152	4.004	2.372	\$145
Domestic Wellness Trip Expenditures (US\$ millions)	\$479.3	\$603.9	\$345.0	
Inbound/International				
Inbound Wellness Trips (millions)	2.332	3.052	0.959	\$1,461
Inbound Wellness Trip Expenditures (US\$ millions)	\$2,801.7	\$4,401.7	\$1,400.7	
Total Wellness Tourism				
Total Wellness Trips (millions)	5.484	7.056	3.331	\$524
Total Wellness Trip Expenditures (US\$ millions)	\$3,281.0	\$5,005.6	\$1,745.7	

Note: These figures include both primary and secondary wellness tourism trips. Figures may not sum to total due to rounding. See Appendix for wellness tourism category descriptions and definitions. Source: Global Wellness Institute, based on tourism data from Euromonitor.

Primary and Secondary Wellness Tourism Trips and Expenditures in Indonesia: 2017, 2019, 2020

	Primary and Secondary Wellness Trips			Average Expenditures Per Trip
	2017	2019	2020	2020
Primary				
Primary Wellness Trips (millions)	0.313	0.346	0.075	\$1,207
Primary Wellness Trip Expenditures (US\$ millions)	\$361.6	\$481.4	\$90.8	
Secondary				
Secondary Wellness Trips (millions)	5.171	6.710	3.256	\$508
Secondary Wellness Trip Expenditures (US\$ millions)	\$2,919.4	\$4,524.3	\$1,655.0	

Note: These figures combine both inbound/international and domestic wellness tourism trips. Figures may not sum to total due to rounding. See Appendix for wellness tourism category descriptions and definitions. Source: Global Wellness Institute, based on tourism data from Euromonitor.

APPENDIX: WELLNESSECONOMY DEFINITIONS

1. The Wellness Economy and Its Eleven Sectors

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

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

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

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

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

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

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

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

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

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

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

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

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

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

2. Physical Activity

Recreational Physical Activities

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

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

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

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

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

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

Physical Activity Enabling Sectors

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

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

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

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

3. Mental Wellness

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

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

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

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

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

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

4. Wellness Tourism

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

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

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

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

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

5. Spas

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

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

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

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

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

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

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

6. Thermal/Mineral Springs

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

Types of Thermal/Mineral Springs Establishments

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

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

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

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

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



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