



GLOBAL WELLNESS
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EMPOWERING WELLNESS WORLDWIDE

DATA FOR 2019-2022

The Global Wellness Economy: Country Rankings



The Global Wellness Economy: Country Rankings

DATA FOR 2019-2022

JANUARY 2024



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Contents

What Is Wellness?	i
What Is the Wellness Economy?	ii
Research Methodology and Scope	iii

1	The Global Wellness Economy	1
2	Regional Wellness Economy Analysis	3
	Wellness Economy by Region	4
	Post-Pandemic Recovery by Region	5
	Regional Wellness Spending Per Capita and as a Share of GDP	7
	Regional Wellness Economy Profiles:	11
	Asia-Pacific	12
	Europe	13
	Latin America-Caribbean	14
	Middle East-North Africa	15
	North America	16
	Sub-Saharan Africa	17
3	Wellness Economy Country Rankings	19
	Top 25 Largest Wellness Markets	20
	Post-Pandemic Recovery Across Different Countries	22
	Per Capita Spending on Wellness By Country	30
	Detailed Country Data Tables:	33
	Wellness Economy Size and Rankings Time Series (2019-2022)	34
	Wellness Economy and GDP Per Capita (2022)	39
	Wellness Economy and Tourism as a Percent of GDP (2019 and 2022)	44

Appendix: Wellness Economy Definitions	49
Acknowledgements	51
Geography of Wellness Partners	53

Tables and Figures

Chapter 1

Figure 1.1.	Global Wellness Economy: \$5.6 Trillion in 2022 (bubble chart)	1
Figure 1.2.	Global Wellness Economy Market Size and Growth Projections, 2017-2027	2

Chapter 2

Table 2.1.	Wellness Economy by Region, 2019-2022	4
Figure 2.1.	Recovery of the Wellness Economy by Region, 2019 versus 2022	5
Figure 2.2.	Wellness Economy as a Share of GDP by Region, 2019-2022	7
Figure 2.3.	Wellness Economy Per Capita by Region, 2019-2022	8
Figure 2.4.	Regional Comparison of Per Capita Spending on Wellness Versus Other Spending Categories, 2022	9
Figure 2.5.	Asia-Pacific: Wellness Economy Profile, 2019-2022	12
Figure 2.6.	Europe: Wellness Economy Profile, 2019-2022	13
Figure 2.7.	Latin America-Caribbean: Wellness Economy Profile, 2019-2022	14
Figure 2.8.	Middle East-North Africa: Wellness Economy Profile, 2019-2022	15
Figure 2.9.	North America: Wellness Economy Profile, 2019-2022	16
Figure 2.10.	Sub-Saharan Africa: Wellness Economy Profile, 2019-2022	17

Chapter 3

Table 3.1.	Wellness Economy: Top 25 Markets in 2022	20
Figure 3.1.	Average Annual Growth and Pandemic Recovery: Top 25 Markets, 2019-2020 and 2020-2022	23
Table 3.2.	Wellness Economy and Tourism as a Percent of GDP: Top 25 Markets, 2019 and 2022	25
Figure 3.2.	Selected Countries with the Strongest and Weakest Post-Pandemic Wellness Market Recovery (2019-2020 and 2020-2022)	26
Table 3.3.	Wellness Economy and Tourism as a Percent of GDP: Selected Countries with the Strongest and Weakest Post-Pandemic Wellness Market Recovery (2019 and 2022)	29
Figure 3.3.	Composition of the Wellness Economy for Selected Countries in 2022	30
Table 3.4.	Wellness Economy Per Capita, GDP Per Capita, and Tourism: Top 25 Markets in 2022	31
Table 3.5.	Wellness Economy Size and Rankings Time Series (2019-2022)	34
Table 3.6.	Wellness Economy and GDP Per Capita (2022)	39
Table 3.7.	Wellness Economy and Tourism as a Percent of GDP (2019 and 2022)	44

About the Global Wellness Institute

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

www.globalwellnessinstitute.org

About the Authors

The Global Wellness Economy: Country Rankings (2019-2022) was prepared by Katherine Johnston, Ophelia Yeung, and Tonia Callender. As GWI's principal researchers, they are the team that has defined and measured the size of the global wellness economy and its sectors over the last fifteen years. Their academic and professional background is in economic analysis, international development, and public policy. Ms. Johnston, Ms. Yeung, and Ms. Callender received post-graduate degrees from Georgetown, Princeton, and Harvard Universities, respectively. Together, they bring many decades of experience conducting research, impact assessments, and strategy development for countries, regions, industry consortia, companies, and nonprofit institutions around the world.

PREFACE

What Is Wellness?

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

The Global Wellness Institute (GWI) defines wellness as: ***the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health.***

There are two important aspects to this definition. First, wellness is not a passive or static state, but rather an “active pursuit” that is associated with intentions, choices, and actions as we work toward an optimal state of health and well-being. Second, wellness is linked to holistic health – that is, it extends beyond physical health and incorporates many different dimensions that should work in harmony (see figure).

Wellness is an individual pursuit – we have self-responsibility for our own choices, behaviors, and lifestyles – but it is also significantly influenced by the physical, social, and cultural environments in which we live. Research on the determinants of health indicates that environmental, socioeconomic, and lifestyle factors can account for 80-90% of our disease risks and health outcomes.

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

Wellness Is Multidimensional



PREFACE

What Is the Wellness Economy?

The Global Wellness Institute (GWI) defines the wellness economy as **industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives**. In our definition, the wellness economy encompasses eleven varied and diverse sectors.

GWI first pioneered this concept and measured the wellness economy in the 2014 *Global Wellness Economy Monitor*, when we estimated wellness as a \$3.4 trillion industry in 2013. To our knowledge, this was the first time that wellness was defined and measured as a global industry, with underlying sector-level and country-level data. Since then, we have published updated figures on the wellness economy for 2015, 2017, 2019, and 2020. The overall wellness economy definition, framework, and measurement methodology have not changed over the last decade, but we have made a few key expansions:

- In our 2013 dataset, we only provided regional and country-level data for three sectors (wellness tourism, spas, and thermal/mineral springs). Over time, we have expanded the depth and breadth of our research, and we have provided detailed regional- and country-level data for additional sectors every time we have published the *Global Wellness Economy Monitor*.
- In our 2020 dataset, we added mental wellness as an eleventh sector in the wellness economy (previously our figures had included ten sectors). We also significantly expanded our definition and measurement of the physical activity sector (previously this sector was defined more narrowly as “fitness & mind-body” only).
- In our 2020 dataset, we expanded our regional- and country-level data collection to cover all eleven sectors. For the first time, this allowed us to release aggregated wellness economy figures for every country and region (rather than just at the global level).

Our wellness economy framework and data are grounded in our numerous in-depth sector-level studies, starting with our first study on the global spa industry in 2008. Since then, we have conducted pioneering research on the following seven wellness sectors: **spas, thermal/mineral springs, wellness tourism, workplace wellness, wellness real estate, physical activity, and mental wellness**. For each of these sectors, we have created a conceptual framework to define the sector and its boundaries, and we conduct original, country-level research to estimate the market size and arrive at globally aggregated figures. To our knowledge, these are the only studies that have estimated the size of these sectors across all countries in the world, using a consistent framework.

In addition to the seven wellness sectors where we have done in-depth study, we also produce original country-level and global estimates for four other sectors: **personal care & beauty; healthy eating, nutrition, & weight loss; public health, prevention, & personalized medicine; and traditional & complementary medicine**.

For more information and GWI's most recent data and analysis for the global wellness economy, see: <https://globalwellnessinstitute.org/industry-research/>.

PREFACE

Research Methodology and Scope

The global wellness economy and sector data presented in this report are for the years 2019, 2020, 2021, and 2022. 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 the last fifteen years.

Our dataset covers the entire world (218 countries, territories, and markets). 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) follow GWI's customized definitions and conceptual framework, but they are aggregated primarily from Euromonitor and other secondary sources.

The analysis is based on extensive primary and secondary research conducted from January to September 2023, 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 many other organizations. 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: Hot Springs Initiative, Mental Wellness Initiative, Wellness Tourism Initiative, Wellness Communities & Real Estate Initiative, and Workplace Wellbeing Initiative.

Note that the 2019 and 2020 wellness economy figures presented in this report have been revised and are slightly different from the figures presented in the previous edition of the *Global Wellness Economy Monitor* (released in 2021) and related country reports. These adjustments were made for a number of reasons, including changes in sector definitions and measurements to reflect the evolution of the wellness market, as well as revisions in the underlying data sources that are used for making GWI's estimates for certain sectors.

For more details on the data presented in this report, including global/regional data and sectoral breakdowns, see: *The Global Wellness Economy Monitor* (2023), <https://globalwellnessinstitute.org/industry-research/global-wellness-economy-monitor-2023/>.

CHAPTER 1

The Global Wellness Economy

\$5.6 trillion

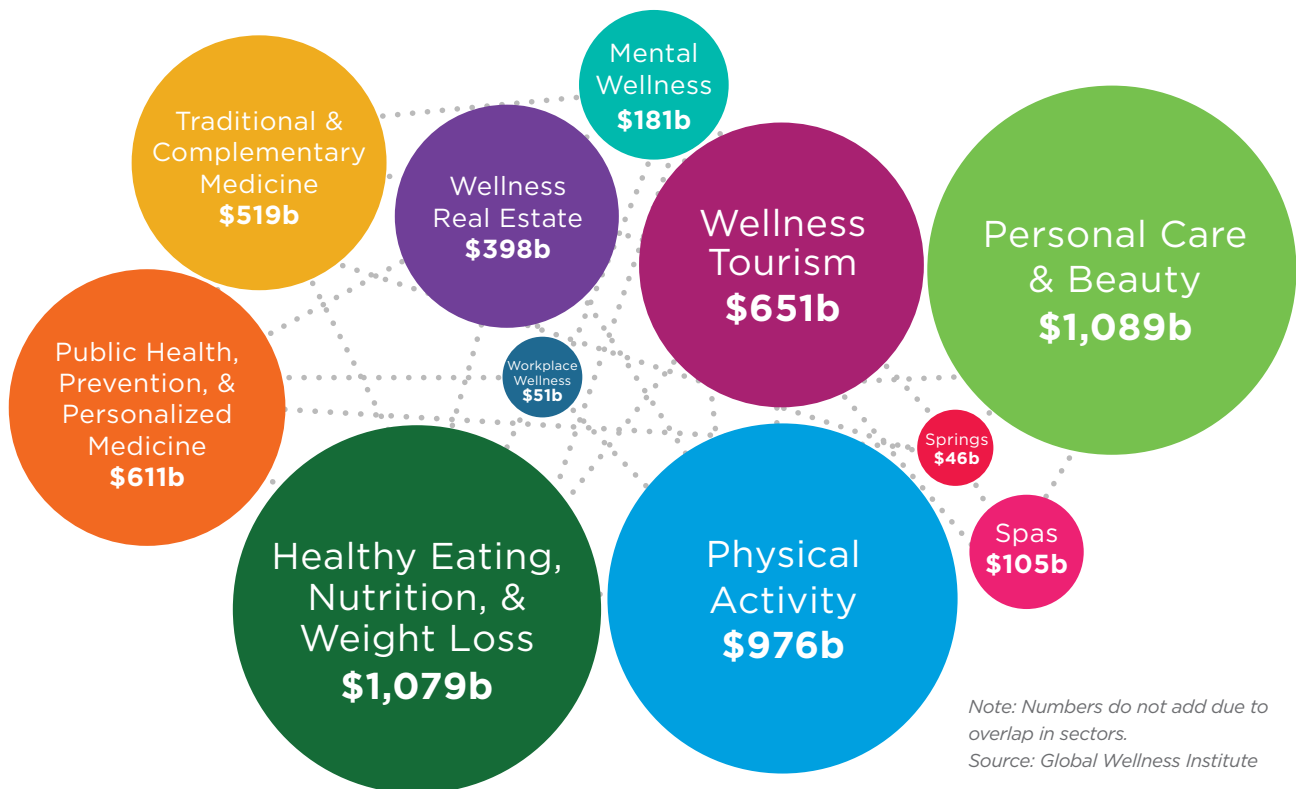
Global Market
In 2022

12.1%

CAGR
2020-2022

Figure 1.1

GLOBAL WELLNESS ECONOMY: \$5.6 trillion in 2022

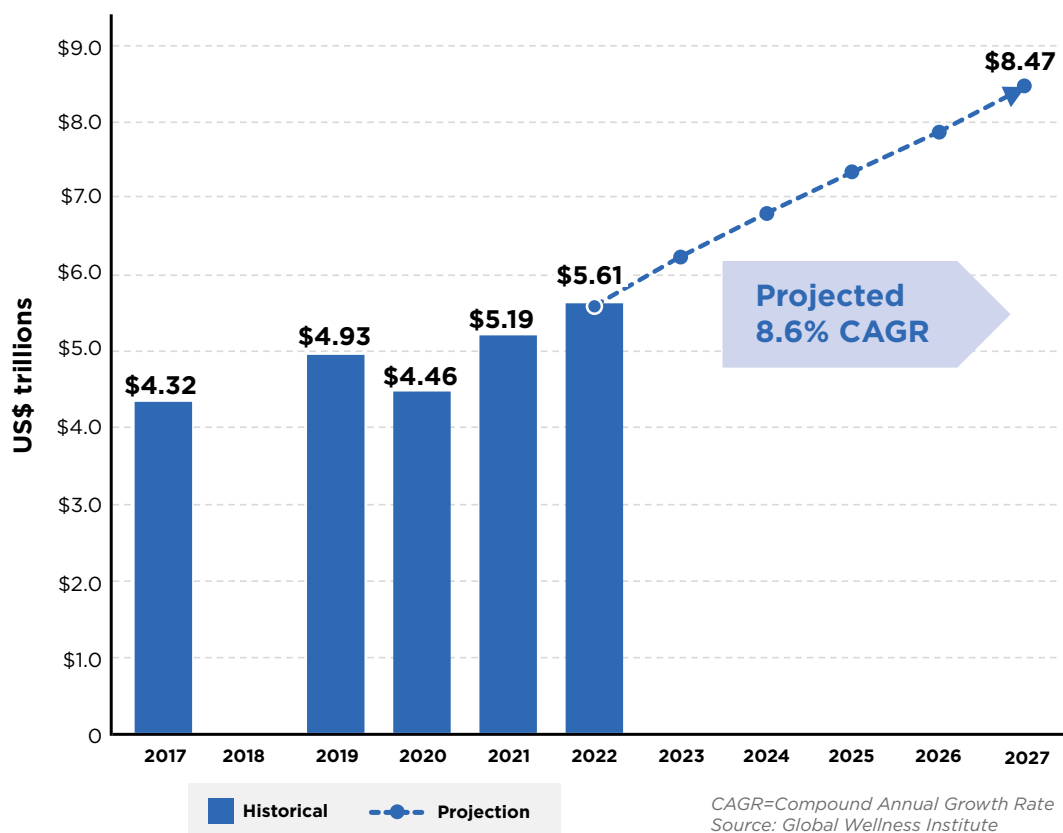


The global wellness economy is recovering strongly from the pandemic and reached \$5.6 trillion in 2022.

Like most industries, the global wellness economy has experienced major shifts and disruptions over the last few years in the wake of the COVID-19 pandemic. Prior to 2020, the wellness economy was growing strongly, and faster than overall economic growth, for many years. In 2019, the wellness economy reached \$4.9 trillion. In 2020, it fell by 9.5% to \$4.46 trillion, due to the pandemic (see *Figure 1.2*). By comparison, global GDP fell by only 2.7% in 2020.¹

The good news is that the wellness economy has recovered quickly from the massive economic shock of 2020. Most (but not all) of the eleven wellness economy sectors have recovered and now surpass their pre-pandemic levels. **In 2022, the global wellness economy stands at \$5.6 trillion dollars, nearly 14% larger than its size in 2019.** The wellness economy grew robustly by 16.4% in 2021 in its initial phase of recovery from the pandemic, and then growth tapered off to 8.1% in 2022. By comparison, global GDP grew by 13.5% in 2021 and 4.1% in 2022. The global wellness economy and all of the wellness sectors are poised for strong ongoing recovery and growth in the coming years, fueled by a long-term trend of rising consumer interest in and need for wellness, which has only accelerated since the pandemic. **We project that the wellness economy will grow at a robust rate of 8.6% annually over the next few years, reaching nearly \$8.5 trillion in 2027** (see *Figure 1.2*).

Figure 1.2
Global Wellness Economy Market Size and Growth Projections, 2017-2027



¹ Global GDP data from: IMF, *World Economic Outlook Database*, April 2023 Edition, <https://www.imf.org/en/Publications/WEO/weo-database/2023/April>.

Regional Wellness Economy Analysis

Key Findings

- North America, Asia-Pacific, and Europe account for 90% of the global wellness economy in 2022.
- As of 2022, the wellness economies across all regions have recovered to and/or surpassed their pre-pandemic levels.
- The regions that have shown the strongest resilience, recovery, and growth in their wellness economies since before the start of the pandemic are North America (now at 123% of its 2019 size), Middle East-North Africa (119%), and Europe (114%).
- Asia-Pacific's wellness economy has experienced relatively slower growth and recovery due to the prolonged impacts of the pandemic and currency depreciation in several major markets.
- In 2022, wellness as a share of GDP has surpassed its pre-pandemic level in North America and Europe, meaning that the wellness economy has been growing faster than the overall economy in these two regions.
- In other regions, wellness as a share of GDP remains below its pre-pandemic level. Globally, wellness as a share of GDP has also shrunk from 5.65% in 2019 to 5.60% in 2022.
- Per capita spending on wellness is significantly higher in North America (\$5,108) and Europe (\$1,596) than in other regions of the world, reflecting both the level of wealth and the overall development of the wellness economy in these two regions.
- Globally, per capita spending on wellness (\$706) is on par with consumer out-of-pocket spending on health goods/medical services (\$711). At the regional level, per capita spending on wellness is higher than consumer out-of-pocket spending on healthcare across every region except North America.

WELLNESS ECONOMY BY REGION

North America, Asia-Pacific, and Europe account for 90% of the global wellness economy in 2022.

The global wellness industry is heavily concentrated in North America (\$1.9 trillion), Asia-Pacific (\$1.7 trillion), and Europe (\$1.5 trillion), which together account for 90% of the entire global wellness economy. In 2022, North America surpassed Asia-Pacific to become the largest regional wellness economy, a shift that has occurred due to relatively slower growth and recovery in some major Asian markets, as well as the prolonged pandemic restrictions and travel bans in China and Japan through 2022.

Note that not all of the wellness spending shown in *Table 2.1* represents “local consumption.” Some wellness sectors, such as *wellness tourism*, *spas*, and *thermal/mineral springs*, are “export industries” – i.e., they sell services to non-residents/inbound tourists and earn foreign exchange for the country. Therefore, in each region, a portion of the wellness economy spending is made by local residents and a portion is from visitors.

Table 2.1
Wellness Economy by Region, 2019-2022

	Wellness Economy					Average Annual Growth Rate	
	(US\$ billions)				Per Capita 2022	2019-2020	2020-2022
	2019*	2020*	2021	2022			
North America	\$1,551.1	\$1,463.1	\$1,692.3	\$1,901.4	\$5,108	-5.7%	14.0%
Asia-Pacific	\$1,589.8	\$1,468.5	\$1,653.7	\$1,698.1	\$399	-7.6%	7.5%
Europe	\$1,293.9	\$1,133.4	\$1,383.7	\$1,469.7	\$1,596	-12.4%	13.9%
Latin America-Caribbean	\$297.3	\$219.0	\$263.7	\$314.4	\$476	-26.3%	19.8%
Middle East-North Africa	\$122.2	\$110.5	\$126.0	\$145.4	\$273	-9.6%	14.7%
Sub-Saharan Africa	\$77.6	\$69.0	\$73.9	\$82.6	\$68	-11.0%	9.4%
WORLD	\$4,931.7	\$4,463.5	\$5,193.3	\$5,611.6	\$706	-9.5%	12.1%

* 2019 and 2020 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.

For more information, see the companion GWI report: Global Wellness Economy Monitor 2023.

Note: Figures may not sum to total due to rounding.

Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

POST-PANDEMIC RECOVERY BY REGION

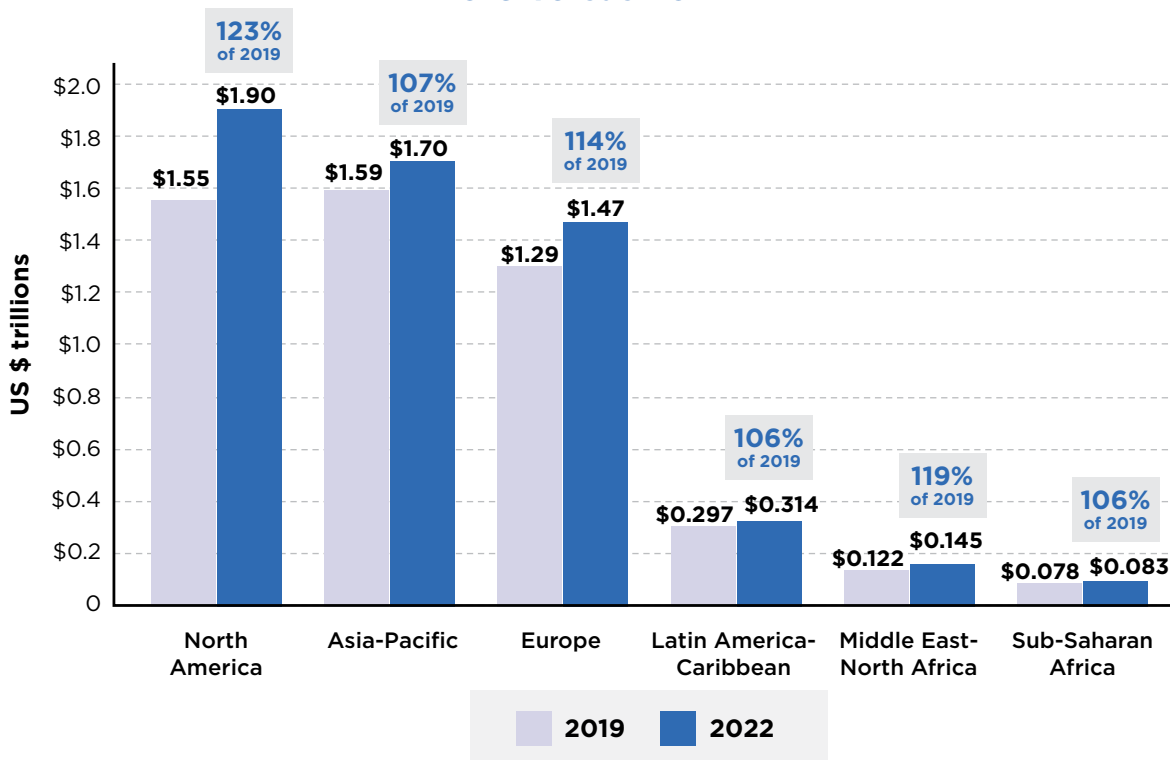
As of 2022, the wellness economies across all regions have recovered to and/or surpassed their pre-pandemic levels.

In 2022, the wellness economies in all six regions were larger than their 2019 size (see *Figure 2.1*). This indicates that all regions have recovered from their downturn at the onset of the pandemic.

North America, Middle East-North Africa, and Europe have shown the strongest resilience and growth from 2019-2022.

The regions that have shown the strongest resilience, recovery, and growth since before the start of the pandemic are North America (now at 123% of its 2019 level), Middle East-North Africa (119%), and Europe (114%). The other three regions are now at 106-107% of their 2019 levels (see *Figure 2.1*).

Figure 2.1
Recovery of the Wellness Economy by Region
2019 versus 2022



Source: Global Wellness Institute. Labels indicate the % to which the region's 2022 wellness economy exceeds its 2019 (pre-pandemic) level.

Asia-Pacific has experienced slower growth and recovery due to the prolonged impacts of the pandemic and currency depreciation.

Asia-Pacific was one of the regions least negatively impacted by the pandemic (-7.6% in 2019-2020), but its wellness market has also seen the slowest growth and recovery over the last two years (12.6% growth from 2020-2021, which then fell to 2.7% growth in 2021-2022). In Asia, a few wellness sectors are still far below their pre-pandemic levels, including *wellness tourism*, *spas*, and *thermal/mineral springs*. Several sectors have posted very slow or negative growth from 2021-2022, including *personal care & beauty*; *healthy eating, nutrition, & weight loss*; *physical activity*; *thermal/mineral springs*; and *workplace wellness*. As the largest wellness economy in the region, China's slow recovery has hampered Asia's overall recovery. Specifically, its prolonged pandemic-related restrictions have depressed domestic Chinese tourism and intra-Asia travel, while weakened economic conditions in 2022 led to a decline in Chinese consumer expenditures, slowing the recovery of many wellness sectors. In other major Asia-Pacific markets - such as Japan, South Korea, and Australia - currency depreciation against the U.S. dollar in 2022 has dampened the growth of their wellness economies when measured in U.S. dollars.

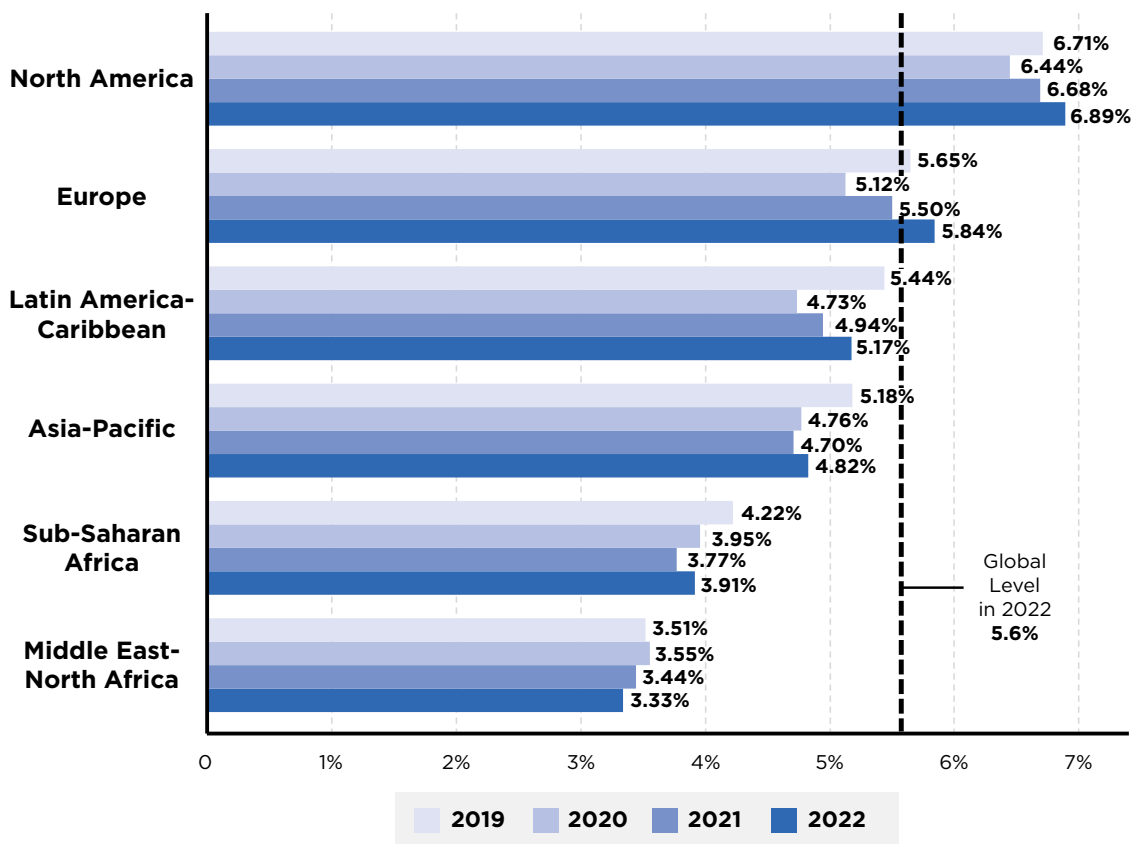
REGIONAL WELLNESS SPENDING PER CAPITA AND AS A SHARE OF GDP

Wellness as a share of GDP has surpassed its pre-pandemic level in North America and Europe, but not in other regions.

Globally, the wellness economy represented 5.6% of total GDP in 2022.² As shown in *Figure 2.2*, the ratio of regional wellness industry size to GDP is the highest, and above the global average, in North America (6.9%) and Europe (5.8%). The Middle East-North Africa region is the lowest, at 3.3%.

In 2020, wellness economy as a share of GDP fell in all regions except for Middle East-North Africa, as many wellness sectors such as *wellness tourism* and *physical activity* were hit hard by the pandemic. As of 2022, wellness as a share of GDP has fully recovered and exceeds pre-pandemic levels in North America and Europe. However, in Latin America-Caribbean, Asia-Pacific, Sub-Saharan Africa, and the Middle East-North Africa, this metric remains below its 2019 level (see *Figure 2.2*), suggesting that the wellness economy has more room for recovery. At the global level, wellness economy as a share of GDP also remains below its pre-pandemic level, falling slightly from 5.65% in 2019 to 5.60% in 2022.

Figure 2.2. Wellness Economy as a Share of GDP by Region, 2019-2022



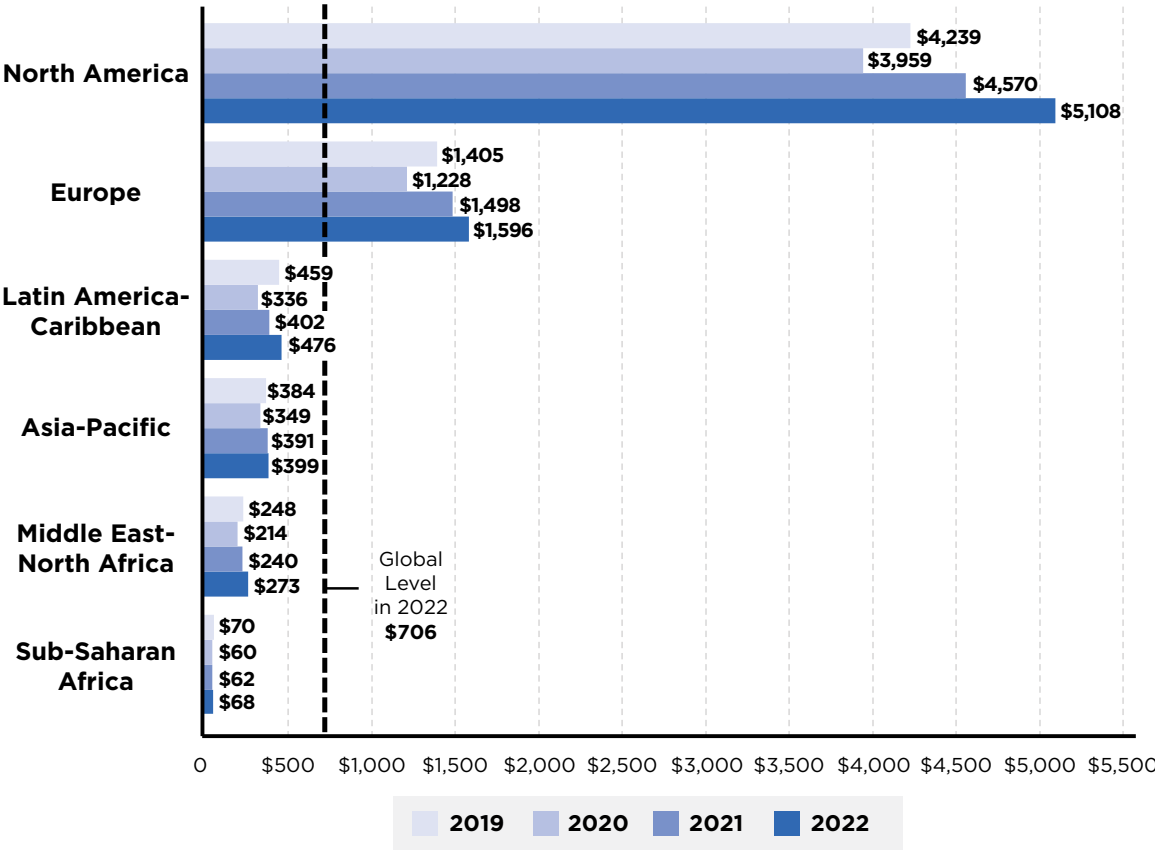
Note: 2019 and 2020 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.
Source: Global Wellness Institute and IMF (GDP data)

² Global GDP data from: IMF, *World Economic Outlook Database*, April 2023 Edition, <https://www.imf.org/en/Publications/WEO/weo-database/2023/April>.

Per capita spending on wellness is very high in North America and Europe.

Per capita spending on wellness is significantly higher in North America (\$5,108) and Europe (\$1,596) than in other regions of the world, reflecting both the level of wealth and the overall development of the wellness economy in these two regions.³ Across all regions, per capita spending on wellness declined in 2020 due to the pandemic, but it has recovered in the subsequent years. As of 2022, per capita spending on wellness exceeds the pre-pandemic/2019 level in all regions except for Sub-Saharan Africa (see Figure 2.3).

Figure 2.3
Wellness Economy Per Capita by Region, 2019-2022



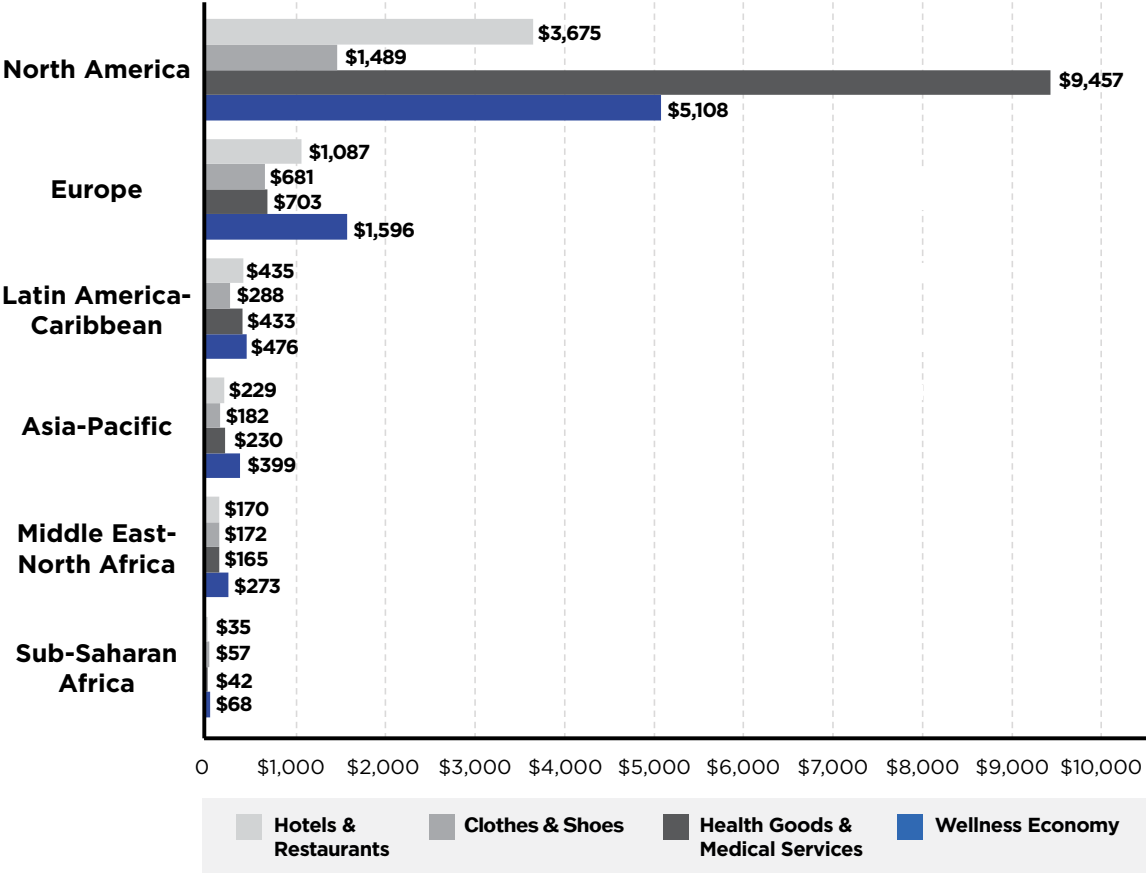
Note: 2019 and 2020 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor. Source: Global Wellness Institute and World Bank (population data)

³ Note that the wellness economy figures include expenditures by inbound wellness tourists; therefore, not all of the per capita spending in each region is from the residents within that region.

Per capita spending on wellness is higher than consumer out-of-pocket spending on healthcare across all regions except North America.

Worldwide, per capita spending on wellness was \$706 in 2022. This spending level is on par with the average consumer out-of-pocket expenditures on health goods/medical services (\$711), according to Euromonitor data. When we look at regional spending patterns, per capita spending on wellness is higher than consumers' out-of-pocket spending on healthcare across every single region except North America (see Figure 2.4). Spending on wellness is also higher than the spending on clothing/shoes (\$289 globally) and hotels/restaurants (\$475 globally) on a per capita basis, both globally and in every region.

Figure 2.4
Regional Comparison of Per Capita Spending on Wellness Versus Other Spending Categories, 2022



Source: Global Wellness Institute and Euromonitor (consumer expenditures data)

Regional Wellness Economy Profiles

Figure 2.5	Asia-Pacific	12
Figure 2.6	Europe	13
Figure 2.7	Latin America-Caribbean	14
Figure 2.8	Middle East-North Africa	15
Figure 2.9	North America	16
Figure 2.10	Sub-Saharan Africa	17

Figure 2.5 Asia-Pacific: Wellness Economy Profile

Asia-Pacific: Wellness Economy (2019-2022)

	2019	2020	2021	2022
Wellness Economy (US\$ billions)	\$1,589.8	\$1,468.5	\$1,653.7	\$1,698.1
Wellness Economy Per Capita (US\$)	\$384	\$349	\$391	\$399
Wellness Economy as a % of Regional GDP	5.18%	4.76%	4.70%	4.82%
Wellness Economy as a % of Global Total	32.24%	32.90%	31.84%	30.26%

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

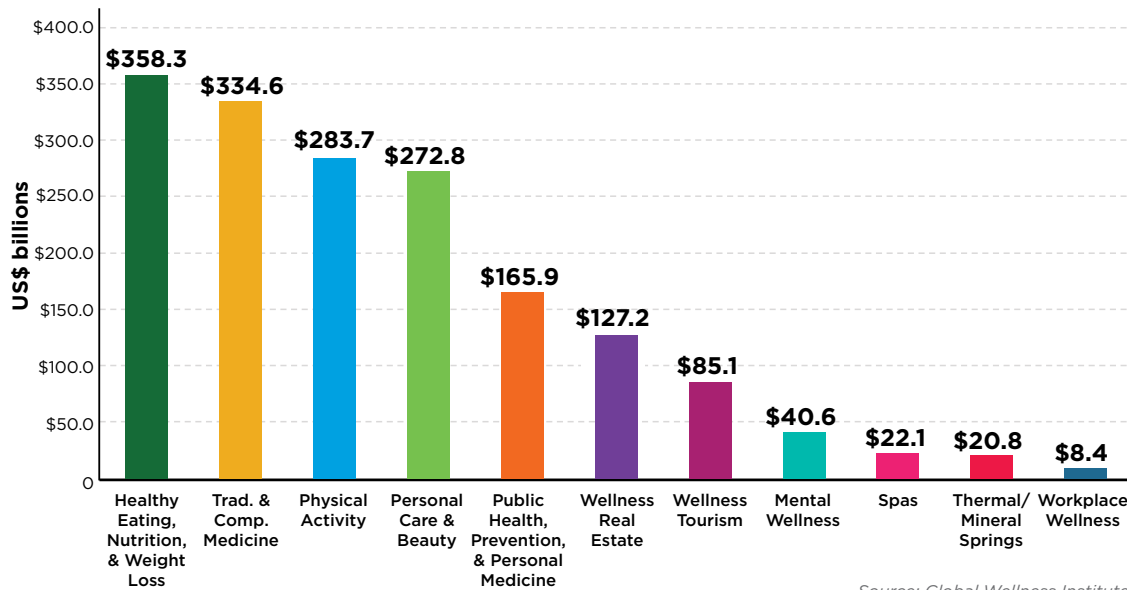
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 45 markets in Asia-Pacific); IMF World Economic Outlook, April 2023 Edition (GDP data); World Bank World Development Indicators (population data).

Asia-Pacific: Top 10 Wellness Markets (2022)

	US\$ billions
China	\$790.35
Japan	\$241.17
India	\$132.51
South Korea	\$112.98
Australia	\$109.59
Indonesia	\$48.64
Taiwan	\$42.74
Philippines	\$40.98
Thailand	\$34.60
Malaysia	\$28.41

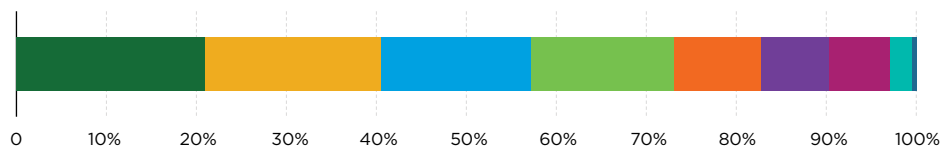
Source: GWI

Asia-Pacific: Wellness Economy Sectors (2022)



Source: Global Wellness Institute

Asia-Pacific: Composition of the Wellness Economy (2022)



Source: Global Wellness Institute

Figure 2.6 Europe: Wellness Economy Profile

Europe: Wellness Economy (2019-2022)

	2019	2020	2021	2022
Wellness Economy (US\$ billions)	\$1,293.9	\$1,133.4	\$1,383.7	\$1,469.7
Wellness Economy Per Capita (US\$)	\$1,405	\$1,228	\$1,498	\$1,596
Wellness Economy as a % of Regional GDP	5.65%	5.12%	5.50%	5.84%
Wellness Economy as a % of Global Total	26.24%	25.39%	26.64%	26.19%

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

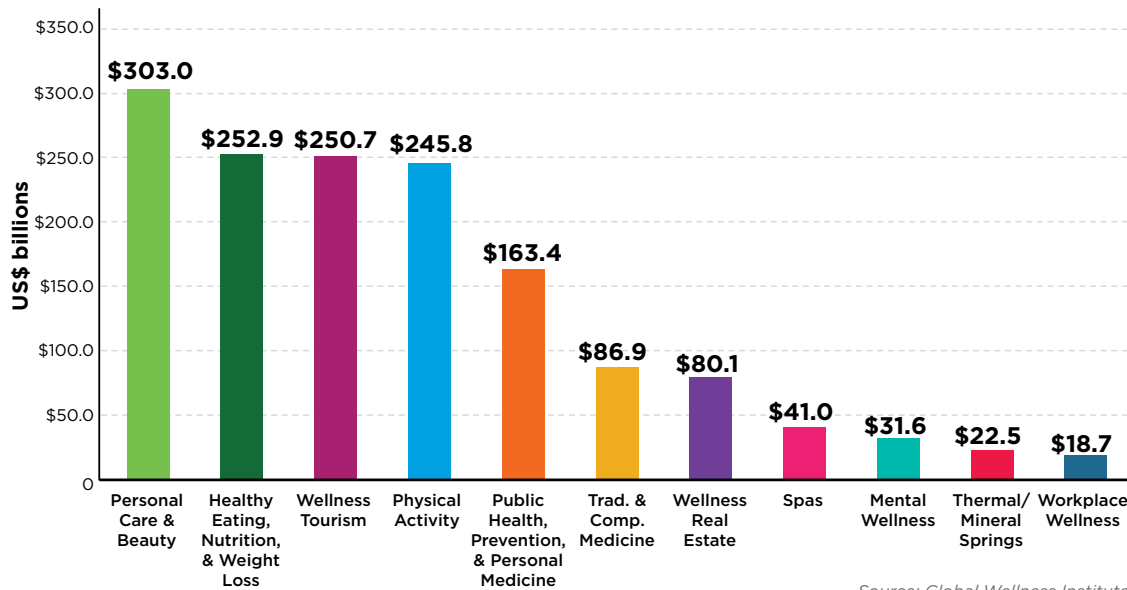
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 55 markets in Europe); IMF World Economic Outlook, April 2023 Edition (GDP data); World Bank World Development Indicators (population data).

Europe: Top 10 Wellness Markets (2022)

	US\$ billions
Germany	\$268.65
United Kingdom	\$223.83
France	\$171.90
Italy	\$112.12
Russia	\$94.52
Spain	\$82.95
Netherlands	\$52.30
Switzerland	\$50.31
Turkey	\$44.95
Austria	\$42.35

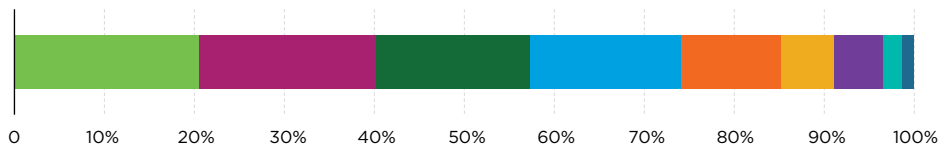
Source: GWI

Europe: Wellness Economy Sectors (2022)



Source: Global Wellness Institute

Europe: Composition of the Wellness Economy (2022)



Source: Global Wellness Institute

Figure 2.7 Latin America-Caribbean: Wellness Economy Profile

Latin America-Caribbean: Wellness Economy (2019-2022)

	2019	2020	2021	2022
Wellness Economy (US\$ billions)	\$297.3	\$219.0	\$263.7	\$314.4
Wellness Economy Per Capita (US\$)	\$459	\$336	\$402	\$476
Wellness Economy as a % of Regional GDP	5.44%	4.73%	4.94%	5.17%
Wellness Economy as a % of Global Total	6.03%	4.91%	5.08%	5.60%

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

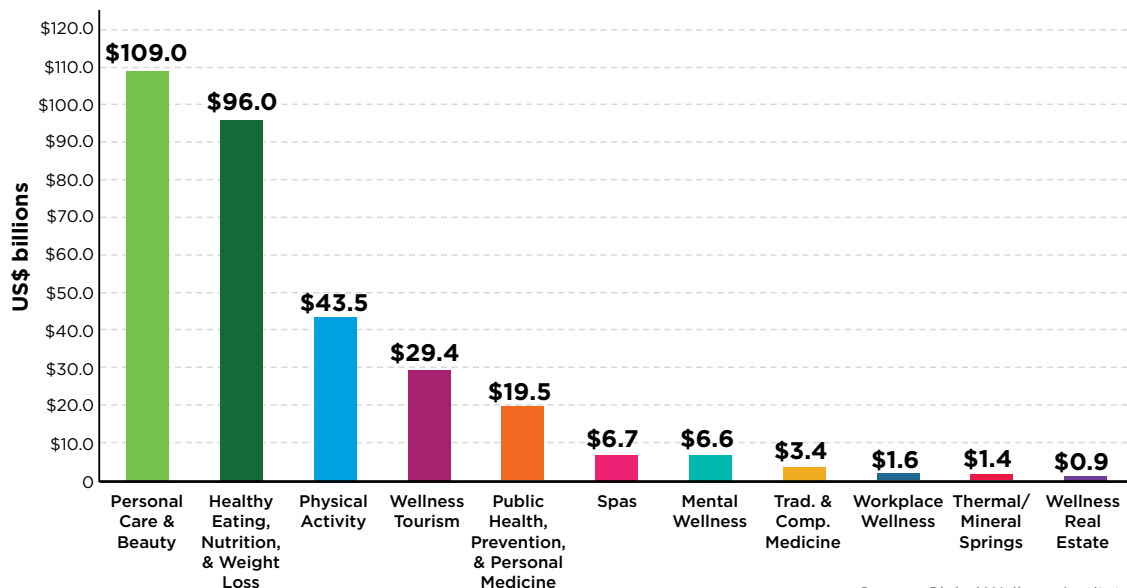
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 46 markets in Latin America-Caribbean); IMF World Economic Outlook, April 2023 Edition (GDP data); World Bank World Development Indicators (population data).

Latin America-Caribbean: Top 10 Wellness Markets (2022)

	US\$ billions
Brazil	\$95.86
Mexico	\$73.61
Argentina	\$29.45
Chile	\$17.46
Peru	\$15.04
Colombia	\$14.19
Costa Rica	\$9.20
Ecuador	\$8.40
Panama	\$7.16
Puerto Rico	\$4.56

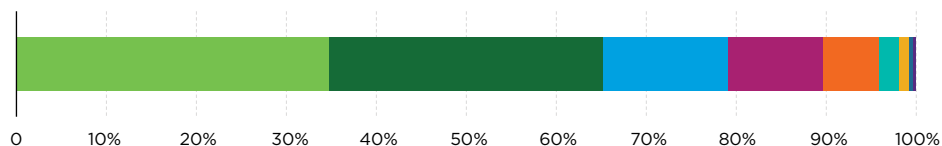
Source: GWI

Latin America-Caribbean: Wellness Economy Sectors (2022)



Source: Global Wellness Institute

Latin America-Caribbean: Composition of the Wellness Economy (2022)



Source: Global Wellness Institute

Figure 2.8 Middle East-North Africa: Wellness Economy Profile

Middle East-North Africa: Wellness Economy (2019-2022)

	2019	2020	2021	2022
Wellness Economy (US\$ billions)	\$122.2	\$110.5	\$126.0	\$145.4
Wellness Economy Per Capita (US\$)	\$248	\$214	\$240	\$273
Wellness Economy as a % of Regional GDP	3.51%	3.55%	3.44%	3.33%
Wellness Economy as a % of Global Total	2.48%	2.47%	2.43%	2.59%

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

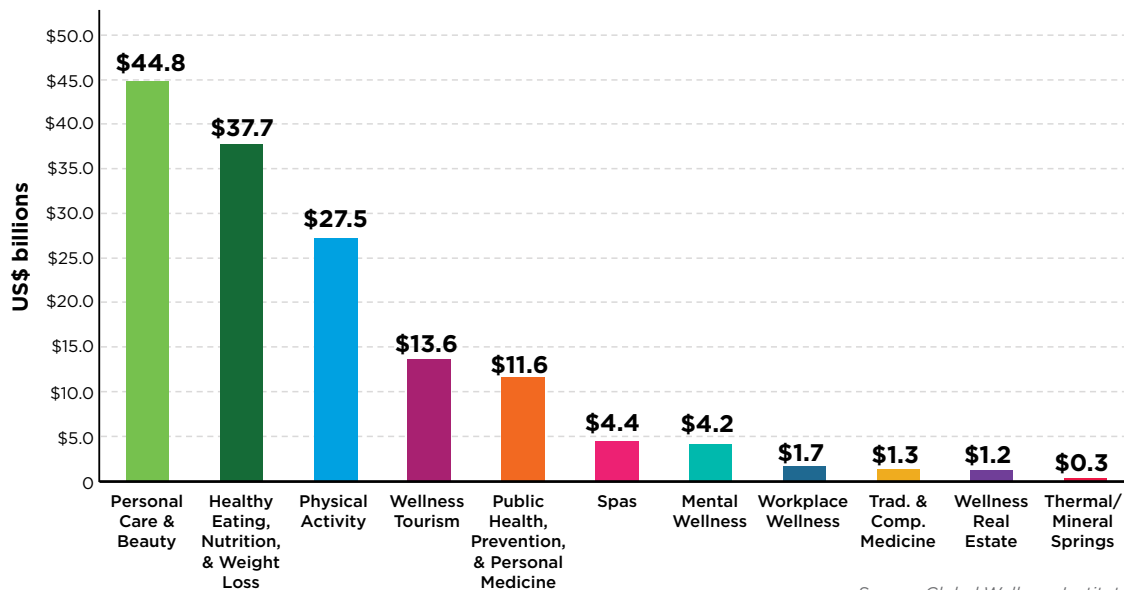
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 20 markets in Middle East-North Africa); IMF World Economic Outlook, April 2023 Edition (GDP data); World Bank World Development Indicators (population data).

Middle East-North Africa: Top 10 Wellness Markets (2022)

	US\$ billions
UAE	\$23.11
Saudi Arabia	\$19.77
Israel	\$19.13
Egypt	\$15.78
Iran	\$13.69
Morocco	\$7.88
Algeria	\$7.60
Kuwait	\$6.77
Oman	\$3.94
Jordan	\$3.67

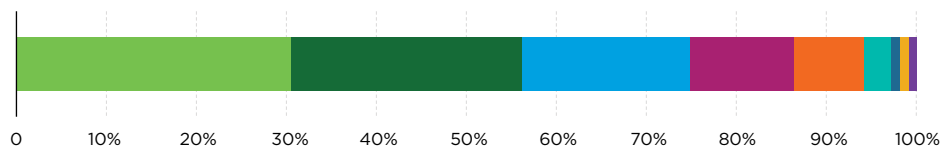
Source: GWI

Middle East-North Africa: Wellness Economy Sectors (2022)



Source: Global Wellness Institute

Middle East-North Africa: Composition of the Wellness Economy (2022)



Source: Global Wellness Institute

Figure 2.9 North America: Wellness Economy Profile

North America: Wellness Economy (2019-2022)

	2019	2020	2021	2022
Wellness Economy (US\$ billions)	\$1,551.1	\$1,463.1	\$1,692.3	\$1,901.4
Wellness Economy Per Capita (US\$)	\$4,239	\$3,959	\$4,570	\$5,108
Wellness Economy as a % of Regional GDP	6.71%	6.44%	6.68%	6.89%
Wellness Economy as a % of Global Total	31.45%	32.78%	32.59%	33.88%

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

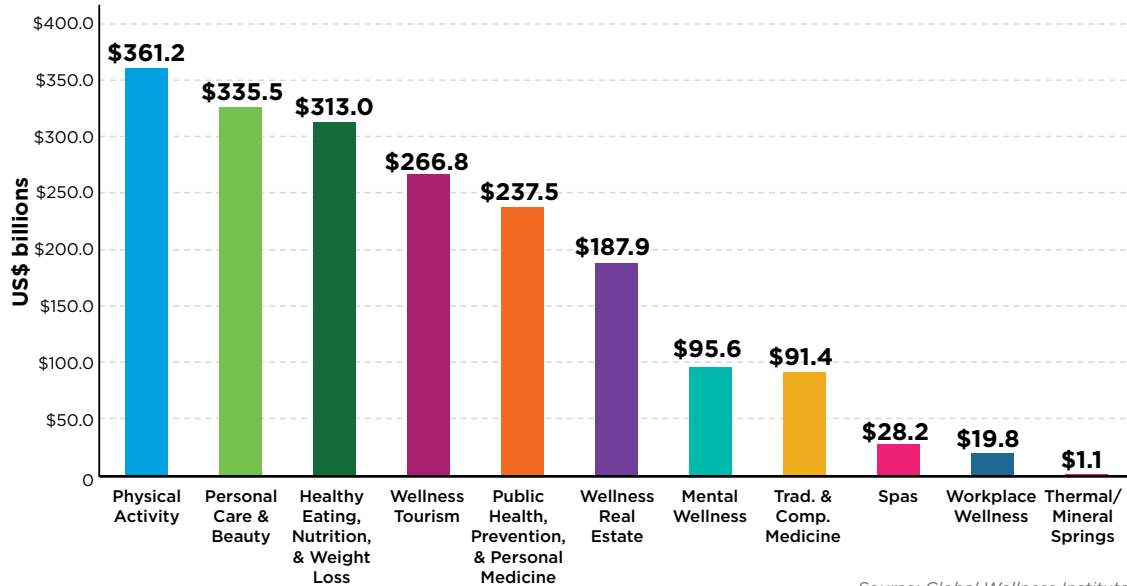
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 2 markets in North America); IMF World Economic Outlook, April 2023 Edition (GDP data); World Bank World Development Indicators (population data).

North America: Wellness Markets (2022)

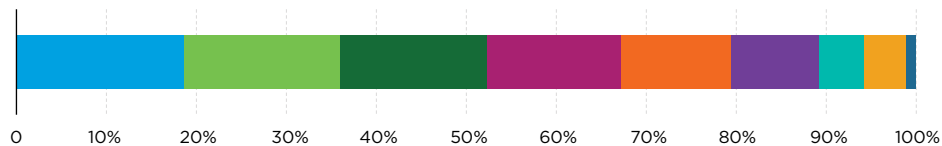
	US\$ billions
United States	\$1,773.45
Canada	\$127.96

Source: GWI

North America: Wellness Economy Sectors (2022)



North America: Composition of the Wellness Economy (2022)



Source: Global Wellness Institute

Figure 2.10 Sub-Saharan Africa: Wellness Economy Profile

Sub-Saharan Africa: Wellness Economy (2019-2022)

	2019	2020	2021	2022
Wellness Economy (US\$ billions)	\$77.6	\$69.0	\$73.9	\$82.6
Wellness Economy Per Capita (US\$)	\$70	\$60	\$62	\$68
Wellness Economy as a % of Regional GDP	4.22%	3.95%	3.77%	3.91%
Wellness Economy as a % of Global Total	1.57%	1.55%	1.42%	1.47%

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

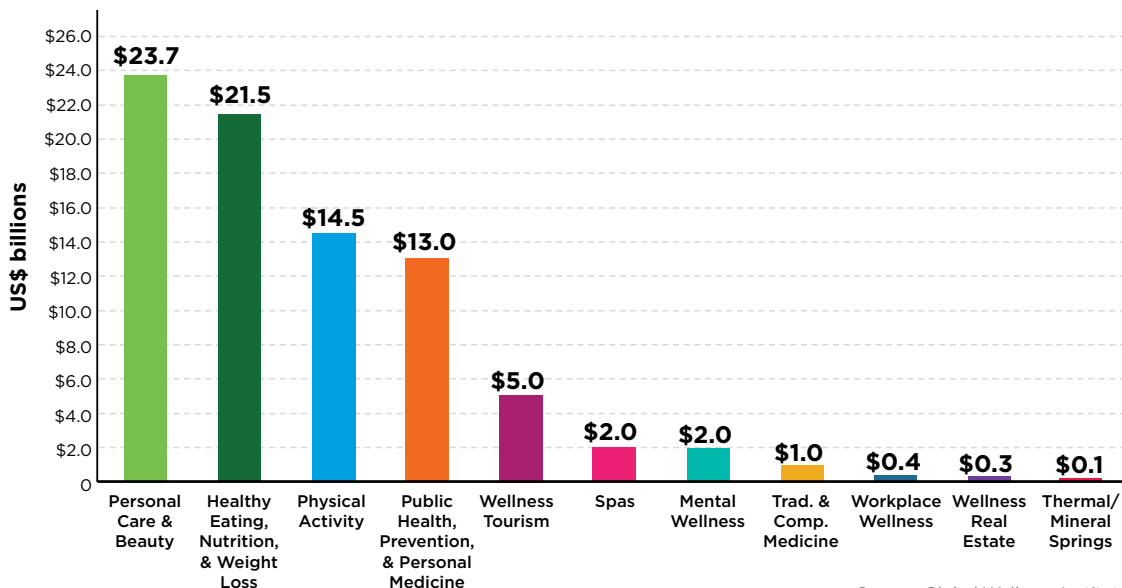
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 50 markets in Sub-Saharan Africa); IMF World Economic Outlook, April 2023 Edition (GDP data); World Bank World Development Indicators (population data).

Sub-Saharan Africa: Top 10 Wellness Markets (2022)

	US\$ billions
South Africa	\$21.69
Nigeria	\$13.46
Kenya	\$6.60
Ghana	\$3.01
Tanzania	\$2.88
Angola	\$2.34
Zimbabwe	\$2.19
Cote d'Ivoire	\$2.12
Uganda	\$1.78
Senegal	\$1.13

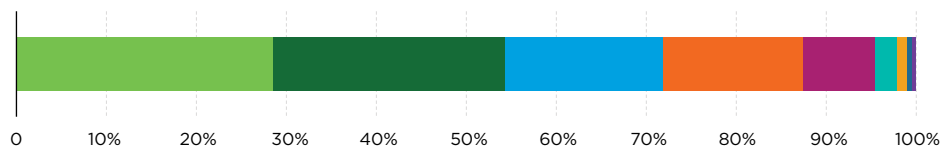
Source: GWI

Sub-Saharan Africa: Wellness Economy Sectors (2022)



Source: Global Wellness Institute

Sub-Saharan Africa: Composition of the Wellness Economy (2022)



Source: Global Wellness Institute

Wellness Economy Country Rankings

Key Findings

- The five largest wellness markets in 2022 are: the **United States** (\$1.8 trillion), **China** (\$790 billion), **Germany** (\$269 billion), **Japan** (\$241 billion), and the **United Kingdom** (\$224 billion).
- The top ten largest wellness markets represent 70% of the global wellness economy, while the top 25 represent 86%.
- The 25 largest wellness markets have mostly recovered from the pandemic and have resumed a robust growth trajectory. When we compare the size of the national wellness economies in 2022 with 2019, all but three (**Thailand, Japan, Brazil**) of the top 25 markets have surpassed their pre-pandemic size when their markets are measured in U.S. dollar terms.
- Large wellness markets with especially strong growth and recovery since the pandemic include the **United Kingdom**, the **Netherlands**, the **United States**, **Mexico**, **Canada**, and **Australia**. In 2022, the wellness economies of all six countries surpassed their 2019 size by 120% or more.
- Currency depreciation has affected the measurements of some major wellness markets, including **Japan**, **Brazil**, and the **Euro zone countries**. In these countries, the performance of the wellness economy is stronger when measured in their local currencies.
- An expanding middle class and strong economic growth are driving the growth of the wellness economy in some large middle-income countries (e.g., **Bangladesh**, **Iran**, **Pakistan**, and **Argentina**).
- Wellness tourism is propelling strong wellness economy growth and recovery in some higher-income countries (e.g., **Israel**, **United Arab Emirates**, **Croatia**, **Romania**, and **Czech Republic**). In other markets (e.g., **Hong Kong** and **Thailand**), weak tourism recovery is hampering wellness economy recovery.
- Per capita spending on wellness is highest in wealthy countries and in countries that are highly dependent on tourism (e.g., **Seychelles**, **Switzerland**, **Iceland**, **Aruba**, and the **United States**). All of these countries had per capita wellness spending higher than \$5,000 in 2022, as compared to \$706 globally.

Table 3.1
Wellness Economy: Top 25 Markets in 2022

	Wellness Real Estate Market						Average Annual Growth Rate	
	(US\$ billions)				Rank in	Rank in	2019-2020	2020-2022
	2019*	2020*	2021	2022	2019	2022		
United States	\$1,444.7	\$1,363.8	\$1,577.4	\$1,773.4	1	1	-5.6%	14.0%
China	\$701.9	\$666.8	\$784.9	\$790.4	2	2	-5.0%	8.9%
Germany	\$244.7	\$196.8	\$246.5	\$268.6	4	3	-19.6%	16.8%
Japan	\$284.3	\$261.3	\$262.3	\$241.2	3	4	-8.1%	-3.9%
United Kingdom	\$170.5	\$157.0	\$221.5	\$223.8	5	5	-7.9%	19.4%
France	\$152.3	\$138.1	\$170.5	\$171.9	6	6	-9.4%	11.6%
India	\$112.3	\$97.6	\$114.3	\$132.5	7	7	-13.1%	16.5%
Canada	\$106.4	\$99.2	\$114.9	\$128.0	10	8	-6.7%	13.5%
South Korea	\$99.6	\$94.4	\$109.8	\$113.0	11	9	-5.2%	9.4%
Italy	\$108.0	\$96.4	\$112.0	\$112.1	9	10	-10.7%	7.9%
Australia	\$91.5	\$86.0	\$100.9	\$109.6	12	11	-6.0%	12.9%
Brazil	\$110.2	\$68.6	\$80.5	\$95.9	8	12	-37.7%	18.2%
Russia	\$87.5	\$73.8	\$83.5	\$94.5	13	13	-15.6%	13.2%
Spain	\$76.2	\$65.7	\$76.9	\$82.9	14	14	-13.7%	12.4%
Mexico	\$60.2	\$46.9	\$61.3	\$73.6	15	15	-22.0%	25.2%
Netherlands	\$40.5	\$41.6	\$52.7	\$52.3	20	16	2.8%	12.1%
Switzerland	\$44.3	\$38.3	\$41.4	\$50.3	16	17	-13.4%	14.5%
Indonesia	\$43.8	\$43.3	\$45.0	\$48.6	17	18	-1.0%	5.9%
Turkey	\$40.9	\$34.6	\$38.3	\$45.0	19	19	-15.4%	14.0%
Taiwan	\$38.2	\$38.7	\$41.9	\$42.7	22	20	1.3%	5.1%
Austria	\$40.3	\$32.6	\$33.6	\$42.3	21	21	-19.0%	13.9%
Philippines	\$34.9	\$34.6	\$38.3	\$41.0	23	22	-0.8%	8.9%
Poland	\$33.5	\$31.9	\$36.7	\$39.4	24	23	-4.7%	11.1%
Thailand	\$43.0	\$29.4	\$28.0	\$34.6	18	24	-31.6%	8.5%
Sweden	\$27.1	\$26.3	\$31.3	\$30.4	26	25	-3.0%	7.5%

* 2019 and 2020 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor. For more information, see the companion GWI report: Global Wellness Economy Monitor 2023. Ranks are out of 145 countries. See **Table 3.5** for detailed time series data for all 145 countries. Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

TOP 25 LARGEST WELLNESS MARKETS

The top 25 largest wellness markets represent 86% of the global wellness economy.

North America, Asia-Pacific, and Europe together account for 90% of the global wellness economy, and all but two (**Brazil** and **Mexico**) of the 25 largest wellness markets are located in those regions (see *Table 3.1*). The **United States** is by far the largest market, at \$1.8 trillion in 2022 – more than double the size of the second-largest market (**China**, at \$790 billion). In fact, the **United States** accounts for 32% of the entire global wellness economy in 2022. The top ten markets represent 70% of the global total, while the top 25 markets represent 86%.

POST-PANDEMIC RECOVERY ACROSS DIFFERENT COUNTRIES

The 25 largest wellness markets have mostly recovered from the pandemic and have resumed a robust growth trajectory.

In spite of all the economic upheavals during the pandemic, the list of the top 25 wellness markets has remained largely the same since 2019. All of the top 25 markets saw a decline in wellness spending in 2019-2020, with the exception of the **Netherlands** and **Taiwan** (see *Figure 3.1*). In the **Netherlands**, a 50% increase in spending on *public health & prevention*, combined with large growth in *wellness real estate*, helped keep the country's wellness economy growing in 2020. Many Asian wellness markets suffered less shrinkage in 2020 as compared to other large markets in Europe, where pandemic restrictions were stricter. In **Taiwan**, for example, the only wellness sector that saw a major decline in 2020 was *wellness tourism*.

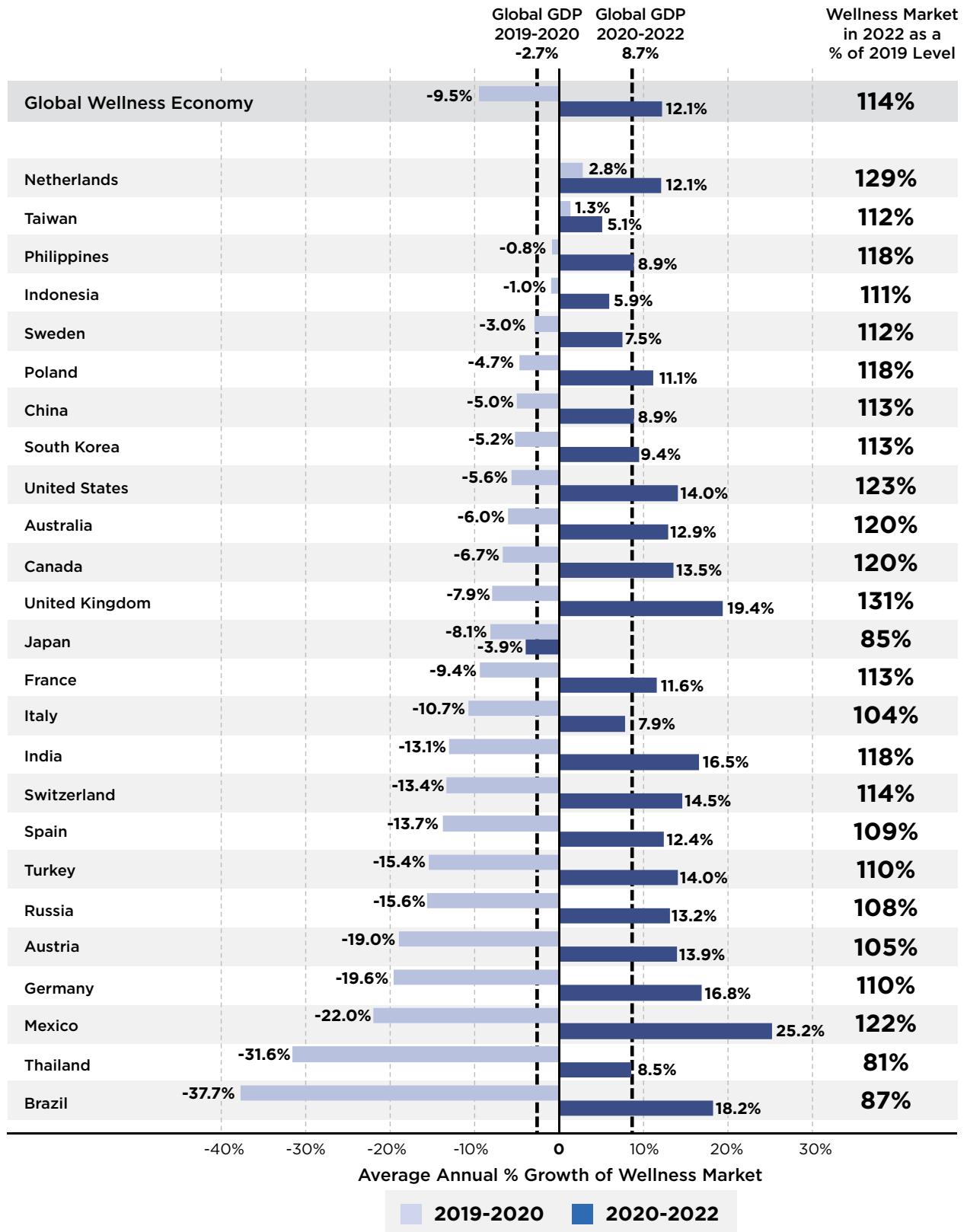
In contrast, the Latin America-Caribbean region was hit the hardest by the pandemic, with the whole region's wellness economy declining by 26.3% in 2019-2020. In **Mexico** and **Brazil**, a large decline in consumer spending in 2020 also reduced spending on wellness sectors such as *personal care & beauty*, *healthy eating*, and *physical activity*, while border closures decimated the *wellness tourism*, *spas*, and *thermal/mineral springs* sectors.

Fortunately, most of the top 25 markets have resumed a strongly positive growth trajectory since 2020. When we compare the size of the national wellness economies in 2022 with 2019, all but three of the top 25 markets (**Thailand**, **Japan**, **Brazil**) have surpassed their pre-pandemic size when their markets are measured in U.S. dollar terms (see *Figure 3.1*).

Large wellness markets with especially strong growth and recovery since the pandemic include the United Kingdom, Netherlands, the United States, Mexico, Canada, and Australia.

Countries with especially robust growth and recovery from 2020-2022 include the **United Kingdom**, **Netherlands**, the **United States**, **Mexico**, **Canada**, and **Australia**, all of which have 2022 wellness economies at 120% or more of their 2019 levels (see *Figure 3.1*). In the **United States**, **Canada**, and **Australia**, the strong performance of their wellness economies has been primarily driven by robust growth across several sectors - *physical activity*; *wellness real estate*; *personal care & beauty*; and *healthy eating, nutrition, & weight loss* - as well as the rapid recovery of *wellness tourism*. The **United Kingdom** and the **Netherlands** have seen strong growth in many of the same sectors from 2020-2022, along with a big uptick in *public health & prevention* in response to the pandemic. **Mexico's** market growth has been driven by growing expenditures on *healthy eating* and the recovery of *wellness tourism*, alongside growth in the *physical activity* and *personal care & beauty* sectors.

Figure 3.1. Average Annual Growth and Pandemic Recovery: Top 25 Markets 2019-2020 and 2020-2022



Note: This chart presents the top 25 countries with the largest wellness markets as of 2022. Countries are ranked in the chart by their growth rate during the first year of the pandemic (2019-2020).
Source: Global Wellness Institute and IMF (GDP data)

Currency depreciation has affected the measurements of some major wellness economies, including Japan, Brazil, and the Euro Zone countries.

GWl's wellness economy figures are expressed in U.S. dollars, and major currency fluctuations can affect these measurements. In 2022, the Japanese Yen fell by 19.8% against the U.S. dollar. Even though **Japan's** wellness economy shrank by 3.9% annually from 2020-2022 when expressed in U.S. dollars, it actually grew by 6.6% annually when measured in Yen. It is interesting to note that in **Japan**, the wellness economy as a share of GDP grew from 5.56% in 2019 to 5.70% in 2022 (see *Table 3.2*), indicating that spending on wellness has been growing faster than the overall economy.

Brazil has a similar situation, with the Real depreciating by 30.7% against the U.S. dollar in 2020. As a result, **Brazil's** wellness economy has fully recovered from the pandemic when measured in Reals but not when measured in U.S. dollars. Still, **Brazil's** wellness economy has shrunk when measured as a share of the country's GDP, from 5.88% in 2019 to 4.98% in 2022 (see *Table 3.2*), meaning that wellness economy growth has lagged behind overall economic growth.

A number of the major European markets, including **Germany**, the **United Kingdom**, **France**, and **Italy**, were similarly affected by currency adjustments, because the Euro depreciated by 12.3% against the U.S. dollar in 2022. Although the wellness economies in these countries did grow in 2022, they would have posted even higher growth rates if they were measured in their local currencies. For example, **Germany's** wellness economy grew by 16.8% annually in U.S. dollars from 2020-2022, but grew by 21.7% when measured in Euros.

Table 3.2
Wellness Economy and Tourism as a Percent of GDP: Top 25 Markets
2019 and 2022

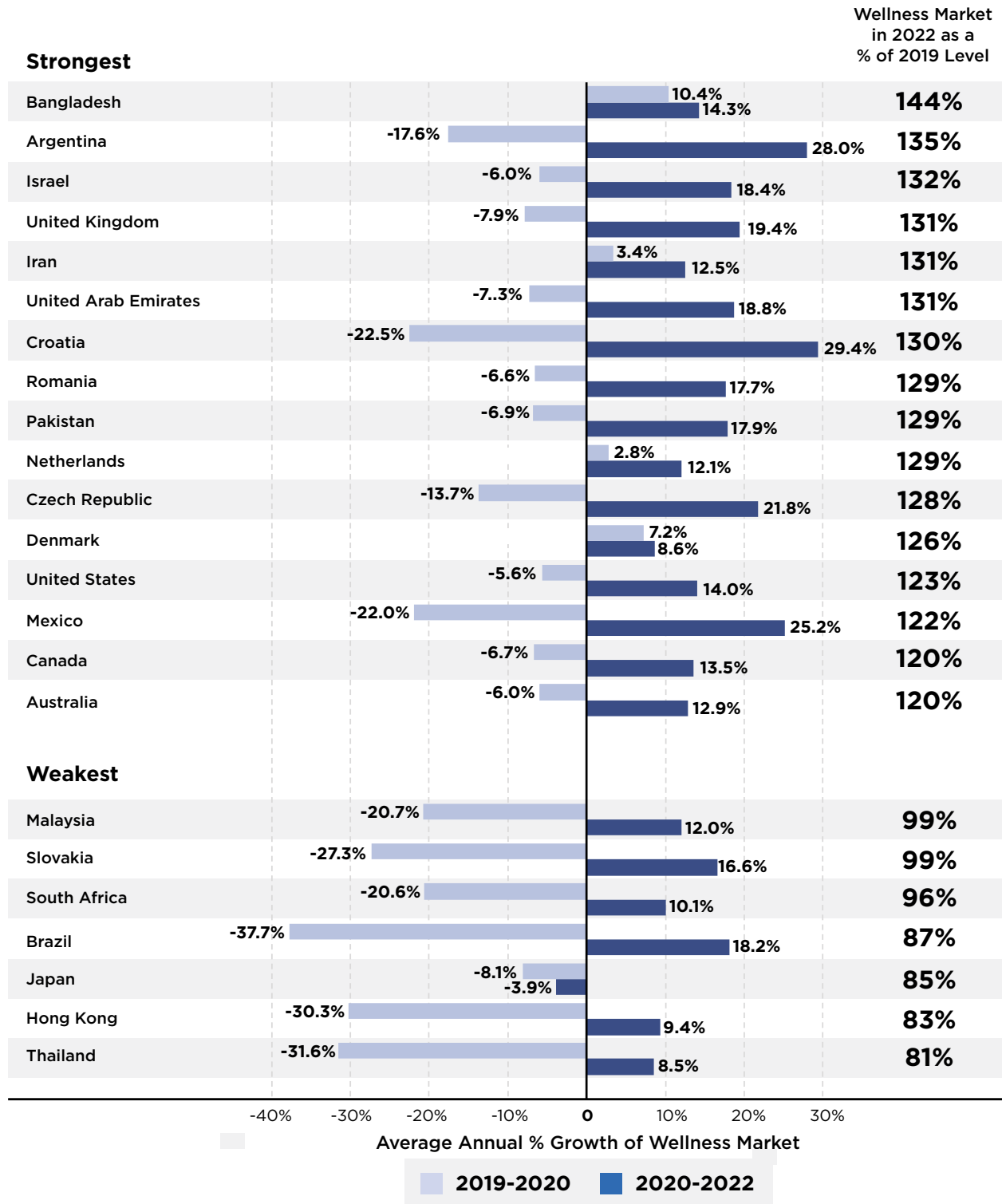
	Wellness Economy as a % of GDP			Overall Tourism as a % of GDP		
	% of GDP 2019	% of GDP 2022	Rank in 2022	% of GDP 2019	% of GDP 2022	Rank in 2022
United States	6.76%	6.96%	32	5.36%	3.95%	66
China	4.89%	4.37%	91	6.64%	1.82%	111
Germany	6.29%	6.59%	39	3.74%	2.98%	82
Japan	5.56%	5.70%	66	2.93%	1.73%	112
United Kingdom	5.96%	7.29%	25	2.48%	2.07%	104
France	5.58%	6.17%	50	7.14%	6.64%	43
India	3.96%	3.91%	105	5.23%	4.10%	62
Canada	6.10%	5.98%	55	3.78%	2.15%	102
South Korea	6.03%	6.78%	35	2.25%	1.64%	115
Italy	5.37%	5.57%	71	5.20%	4.46%	59
Australia	6.60%	6.44%	43	7.18%	4.88%	52
Brazil	5.88%	4.98%	83	4.05%	2.54%	95
Russia	5.16%	4.27%	93	2.12%	1.10%	126
Spain	5.46%	5.92%	57	9.44%	8.44%	31
Mexico	4.74%	5.21%	78	12.08%	10.32%	26
Netherlands	4.45%	5.26%	77	4.24%	3.71%	68
Switzerland	6.13%	6.23%	46	3.47%	3.42%	78
Indonesia	3.91%	3.69%	117	3.30%	3.62%	73
Turkey	5.38%	4.96%	84	6.92%	4.88%	53
Taiwan	6.24%	5.61%	70	3.70%	1.01%	128
Austria	9.06%	8.98%	14	7.61%	6.66%	42
Philippines	9.25%	10.14%	9	12.82%	12.56%	20
Poland	5.62%	5.73%	64	4.17%	3.59%	74
Thailand	7.90%	6.45%	42	16.70%	8.13%	36
Sweden	5.08%	5.19%	79	6.06%	5.30%	48

Ranks are out of 145 countries. See **Table 3.7** for detailed time series data on wellness economy and tourism as a % of GDP in all 145 countries.

Tourism figures include international/inbound and domestic trip expenditures.

Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, April 2023 Edition (GDP data); Euromonitor (tourism data).

Figure 3.2
Selected Countries with the Strongest and Weakest
Post-Pandemic Wellness Market Recovery (2019-2020 and 2020-2022)



*Note: Countries presented in this chart are drawn from those with a wellness market size greater than \$5.0 billion in 2022 (the top 63 largest countries). Countries are ranked in the chart by their post-pandemic recovery (wellness market in 2022 as a % of 2019 level).
 Source: Global Wellness Institute*

Next, we move beyond the 25 largest wellness markets and look at the post-pandemic recovery and growth trends across all countries with wellness economies larger than \$5.0 billion in 2022.⁴ *Figure 3.2* illustrates the countries that have posted the strongest and weakest recovery of their wellness economies from 2019-2022.

Wellness tourism is propelling strong wellness economy growth and recovery in some higher-income countries.

Some of the countries with especially strong post-pandemic recovery are higher-income countries that have very large and growing *wellness tourism* sectors, including **Israel**, the **United Arab Emirates**, **Croatia**, **Romania**, and the **Czech Republic**. The recovery of their *wellness tourism* markets since 2020 has propelled the strong performance of their wellness economies. High growth in per capita income and consumer spending over the last few years has also bolstered the growth of the *personal care & beauty*, *physical activity*, and *healthy eating* sectors in these countries. In the **Czech Republic**, a large increase in *public health & prevention* spending since the pandemic has also fueled growth. In all five of these countries, the wellness economy has grown as a share of GDP from 2019-2022 (see *Table 3.3*), indicating that spending on wellness has been growing faster than the overall economy.

An expanding middle class and strong economic trends are driving wellness economy growth in some large middle-income countries.

In several large middle-income countries, including **Bangladesh**, **Iran**, **Pakistan**, and **Argentina**, socioeconomic trends are driving increased spending on wellness. These four countries have relatively small wellness economies by global standards (and when measured on a per capita basis or as a share of GDP), but they have all posted very strong growth trends and recovery since 2020 (as shown in *Figure 3.2*). All of these countries have a large and/or expanding middle class, growing populations, and above-average growth in per capita income and overall consumer spending. These trends are fueling strong spending growth in the *personal care & beauty*, *healthy eating*, and *physical activity* sectors. In **Iran** and **Bangladesh**, their strong growth was also supported by a jump in *public health & prevention* spending in response to the pandemic.

Over the last few years, inflation has raised the prices of *personal care & beauty* and *healthy eating* products, as well as *sports apparel & footwear* within the *physical activity* sector. Since these middle-income countries import a lot of their consumer goods, price increases likely contributed to increased spending and high growth in these sectors. Nonetheless, in **Bangladesh** and **Pakistan**, the wellness economy has grown as a share of GDP from 2019-2022 (see *Table 3.3*), indicating that there is a level of robust growth in their wellness markets beyond price inflation. In contrast, the wellness economy as a share of GDP has shrunk in **Iran** and **Argentina** during this time period.

⁴ This analysis comprises 63 countries with wellness economies that exceed \$5.0 billion in 2022. It excludes countries with major conflicts or humanitarian crises.

Weak tourism recovery is hampering wellness economy recovery in some markets.

In seven markets, the wellness economies have not yet recovered to their pre-pandemic levels (when measured in U.S. dollars).

Hong Kong has been hit hard by the travel restrictions and quarantine requirements that shrank its *wellness tourism* sector by 93% from 2019-2022, alongside a decline in GDP and consumer spending affecting key wellness sectors, including *personal care & beauty*, *healthy eating*, and *traditional & complementary medicine*. **Thailand's** recovery has also been hampered by the prolonged downturn in *wellness tourism*, with this sector still at less than half its pre-pandemic level as of 2022. Wellness economy as a share of GDP has shrunk significantly in both **Hong Kong** and **Thailand** from 2019-2022 (see *Table 3.3*).

Malaysia, **Slovakia**, and **South Africa** (as well as **Japan** and **Brazil**, discussed on Page 24) have all experienced currency depreciation against the U.S. dollar; even though their wellness economies are still “down” in U.S. dollar terms, they have fully recovered when measured in their local currencies. However, in **Malaysia**, **South Africa**, and **Slovakia**, *wellness tourism* and *thermal/mineral springs* have not fully recovered as of 2022, even when measured in local currency, and wellness as a share of GDP has shrunk in all three countries since 2019 (see *Table 3.3*).

Table 3.3
Wellness Economy and Tourism as a Percent of GDP:
Selected Countries with the Strongest and Weakest
Post-Pandemic Wellness Market Recovery (2019 and 2022)

	Wellness Economy as a % of GDP			Overall Tourism as a % of GDP		
	% of GDP 2019	% of GDP 2022	Rank in 2022	% of GDP 2019	% of GDP 2022	Rank in 2022
Countries with the Strongest Post-Pandemic Wellness Market Recovery						
Bangladesh	1.96%	2.16%	136	0.26%	0.11%	144
Argentina	4.83%	4.66%	88	2.33%	1.34%	123
Israel	3.61%	3.66%	119	3.25%	3.15%	81
United Kingdom	5.96%	7.29%	25	2.48%	2.07%	104
Iran	4.33%	3.89%	108	3.86%	1.02%	127
United Arab Emirates	4.23%	4.55%	89	7.87%	13.48%	18
Croatia	9.41%	10.54%	8	21.93%	22.15%	8
Romania	3.91%	4.21%	95	2.25%	2.90%	83
Pakistan	2.29%	2.53%	133	1.94%	0.72%	132
Netherlands	4.45%	5.26%	77	4.24%	3.71%	68
Czech Republic	5.58%	6.21%	47	4.78%	5.07%	50
Denmark	5.18%	5.81%	59	3.79%	4.39%	60
United States	6.76%	6.96%	32	5.36%	3.95%	66
Mexico	4.74%	5.21%	78	12.08%	10.32%	26
Canada	6.10%	5.98%	55	3.78%	2.15%	102
Australia	6.60%	6.44%	43	7.18%	4.88%	52
Countries with the Weakest Post-Pandemic Wellness Market Recovery						
Malaysia	7.82%	6.96%	31	10.32%	4.76%	55
Slovakia	8.08%	7.44%	24	12.50%	8.16%	35
South Africa	5.80%	5.35%	75	3.50%	2.76%	87
Brazil	5.88%	4.98%	83	4.05%	2.54%	95
Japan	5.56%	5.70%	66	2.93%	1.73%	112
Hong Kong	7.34%	6.16%	51	8.33%	1.26%	125
Thailand	7.90%	6.45%	42	16.70%	8.13%	36

Countries presented in this table are drawn from those with a wellness market size greater than \$5.0 billion in 2022 (the top 63 largest countries, excluding those with major conflicts or humanitarian crises).

Ranks are out of 145 countries. See **Table 3.7** for detailed time series data on wellness economy and tourism as a % of GDP in all 145 countries.

Tourism figures include international/inbound and domestic trip expenditures.

Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, April 2023 Edition (GDP data); Euromonitor (tourism data).

PER CAPITA SPENDING ON WELLNESS BY COUNTRY

Per capita spending on wellness is highest in wealthy countries and in countries that are highly dependent on tourism.

When measured on a per capita basis, wellness economy spending is highest in the **Seychelles, Switzerland, Iceland, Aruba**, and the **United States** (see *Table 3.4*). All of these countries had per capita wellness spending higher than \$5,000 in 2022. By comparison, per capita wellness spending was only \$706 globally.

Most of the top markets for per capita wellness spending are among the world's wealthiest countries and also rank in the top 25 globally for GDP per capita, such as **Switzerland, Iceland**, the **United States, Austria, Australia**, etc. (see *Table 3.4*). The high per capita spending and large wellness economies in these countries reflect a substantial domestic consumer market for wellness products and services, bolstered by high spending by inbound and domestic wellness tourists.

Also on this list are highly tourism-dependent economies such as the **Seychelles, Aruba**, the **Maldives**, and the **Bahamas**. These island economies are popular destinations for high-end wellness tourism, and tourism represents a very large share of their GDPs (see *Table 3.4*). In these four countries, a large portion (50-90%) of all wellness spending comes from inbound wellness tourists; therefore, the high per capita spending figures reflect a robust wellness tourism market, but not necessarily high local wellness spending or a well-developed and diversified wellness market for local residents.

Figure 3.3 is a useful visualization of the two different sets of countries that rank highly for wellness economy per capita: wealthy countries versus tourism dependent countries. In the wealthier countries (**United States, Australia, United Kingdom, Canada**) we see wellness economies that are well-diversified across the eleven sectors. In the tourism-dependent countries (**Seychelles, Maldives, Aruba, Bahamas**) we can easily see that their wellness economies are heavily dominated by spending on *wellness tourism* and *spas*.

Figure 3.3
Composition of the Wellness Economy for Selected Countries in 2022

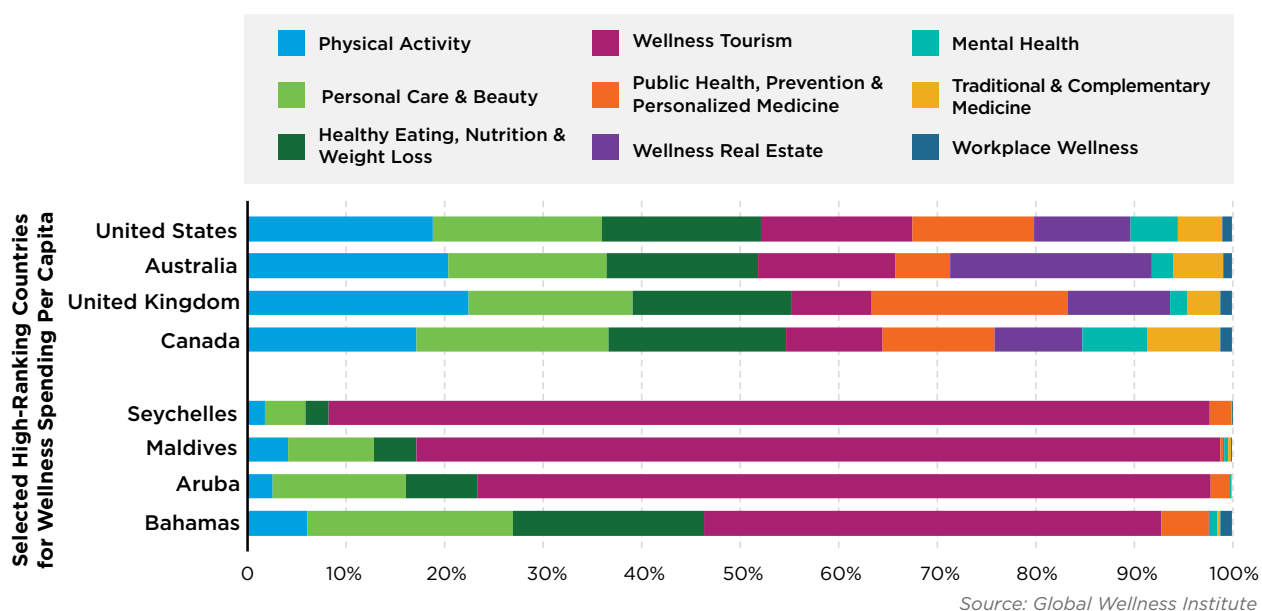


Table 3.4
Wellness Economy Per Capita, GDP Per Capita, and Tourism:
Top 25 Markets in 2022

	Wellness Economy Per Capita		GDP Per Capita		Overall Tourism as a % of GDP	
	US\$	Rank	Current US\$	Rank	% of GDP	Rank
Seychelles	\$8,097	1	\$19,466	54	66.2%	3
Switzerland	\$5,737	2	\$92,371	4	3.4%	78
Iceland	\$5,523	3	\$73,998	8	10.1%	27
Aruba	\$5,361	4	\$31,934	35	77.0%	1
United States	\$5,321	5	\$76,348	7	4.0%	66
Austria	\$4,683	6	\$52,265	15	6.7%	42
Australia	\$4,218	7	\$65,526	10	4.9%	52
Norway	\$4,197	8	\$106,328	2	2.9%	84
Denmark	\$3,846	9	\$66,516	9	4.4%	60
New Zealand	\$3,689	10	\$47,208	21	6.3%	44
United Kingdom	\$3,342	11	\$45,295	22	2.1%	104
Canada	\$3,287	12	\$55,085	13	2.1%	102
Finland	\$3,200	13	\$50,655	17	3.7%	71
Germany	\$3,195	14	\$48,636	20	3.0%	82
Ireland	\$3,172	15	\$103,176	3	2.3%	98
Luxembourg	\$3,105	16	\$127,580	1	4.5%	58
Hong Kong	\$3,025	17	\$49,226	19	1.3%	125
Netherlands	\$2,954	18	\$56,489	11	3.7%	68
Sweden	\$2,902	19	\$55,689	12	5.3%	48
Singapore	\$2,898	20	\$82,808	6	2.1%	105
Maldives	\$2,673	21	\$15,883	59	76.3%	2
U.S. Virgin Islands	\$2,585	22	\$39,552	24	21.7%	10
Bahamas	\$2,575	23	\$33,121	32	26.8%	7
France	\$2,530	24	\$42,409	23	6.6%	43
United Arab Emirates	\$2,448	25	\$51,306	16	13.5%	18

Ranks are out of 145 countries. See **Table 3.6** for detailed time series data on wellness economy per capita in all 145 countries. See **Table 3.7** for detailed time series data on tourism as a % of GDP in all 145 countries. Tourism figures include international/inbound and domestic trip expenditures. Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, April 2023 Edition (GDP data); Euromonitor (tourism data).

Detailed Country Data Tables

RANKING 145 COUNTRIES

Table 3.5	Wellness Economy Size and Rankings Time Series (2019-2022)	34
Table 3.6	Wellness Economy and GDP Per Capita (2022)	39
Table 3.7	Wellness Economy and Tourism as a Percent of GDP (2019 and 2022)	44

Table 3.5. Wellness Economy Size and Rankings Time Series (2019-2022)

Wellness Economy Size and Rankings Time Series								
	2019*		2020*		2021		2022	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
United States	\$1,444.68	1	\$1,363.81	1	\$1,577.37	1	\$1,773.45	1
China	\$701.88	2	\$666.82	2	\$784.90	2	\$790.35	2
Germany	\$244.70	4	\$196.84	4	\$246.53	4	\$268.65	3
Japan	\$284.33	3	\$261.32	3	\$262.31	3	\$241.17	4
United Kingdom	\$170.48	5	\$157.04	5	\$221.50	5	\$223.83	5
France	\$152.31	6	\$138.06	6	\$170.51	6	\$171.90	6
India	\$112.29	7	\$97.61	8	\$114.27	8	\$132.51	7
Canada	\$106.40	10	\$99.25	7	\$114.89	7	\$127.96	8
South Korea	\$99.58	11	\$94.36	10	\$109.83	10	\$112.98	9
Italy	\$107.96	9	\$96.39	9	\$112.02	9	\$112.12	10
Australia	\$91.50	12	\$85.99	11	\$100.86	11	\$109.59	11
Brazil	\$110.18	8	\$68.63	13	\$80.47	13	\$95.86	12
Russia	\$87.47	13	\$73.82	12	\$83.49	12	\$94.52	13
Spain	\$76.16	14	\$65.71	14	\$76.88	14	\$82.95	14
Mexico	\$60.16	15	\$46.95	15	\$61.29	15	\$73.61	15
Netherlands	\$40.49	20	\$41.63	17	\$52.74	16	\$52.30	16
Switzerland	\$44.26	16	\$38.35	19	\$41.38	19	\$50.31	17
Indonesia	\$43.77	17	\$43.35	16	\$45.00	17	\$48.64	18
Turkey	\$40.87	19	\$34.56	21	\$38.28	21	\$44.95	19
Taiwan	\$38.16	22	\$38.67	18	\$41.93	18	\$42.74	20
Austria	\$40.29	21	\$32.64	22	\$33.65	23	\$42.35	21
Philippines	\$34.87	23	\$34.59	20	\$38.29	20	\$40.98	22
Poland	\$33.48	24	\$31.91	23	\$36.73	22	\$39.42	23
Thailand	\$42.96	18	\$29.40	24	\$28.05	25	\$34.60	24
Sweden	\$27.13	26	\$26.32	25	\$31.33	24	\$30.43	25
Argentina	\$21.80	29	\$17.98	30	\$21.37	29	\$29.45	26
Malaysia	\$28.57	25	\$22.65	26	\$22.90	27	\$28.41	27
United Arab Emirates	\$17.67	33	\$16.39	34	\$18.45	33	\$23.11	28
Norway	\$20.47	30	\$19.42	27	\$22.57	28	\$22.90	29
Denmark	\$17.95	32	\$19.24	28	\$23.81	26	\$22.70	30
Hong Kong	\$26.64	27	\$18.58	29	\$20.76	30	\$22.22	31

Wellness Economy Size and Rankings Time Series								
	2019*		2020*		2021		2022	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
South Africa	\$22.54	28	\$17.90	31	\$19.64	32	\$21.69	32
Belgium	\$18.35	31	\$17.09	32	\$19.94	31	\$20.73	33
Saudi Arabia	\$17.05	36	\$16.16	35	\$17.95	36	\$19.77	34
Vietnam	\$17.42	34	\$15.77	36	\$16.77	39	\$19.60	35
Israel	\$14.52	42	\$13.65	39	\$16.83	38	\$19.13	36
New Zealand	\$17.03	37	\$15.69	37	\$18.35	34	\$18.90	37
Portugal	\$16.54	38	\$14.16	38	\$16.99	37	\$18.34	38
Czech Republic	\$14.08	44	\$12.15	42	\$14.77	42	\$18.03	39
Finland	\$17.30	35	\$16.40	33	\$18.05	35	\$17.78	40
Chile	\$14.93	40	\$12.05	44	\$16.75	40	\$17.46	41
Singapore	\$14.75	41	\$12.67	40	\$14.40	44	\$16.34	42
Ireland	\$13.86	47	\$11.66	46	\$14.57	43	\$16.14	43
Egypt	\$13.92	46	\$12.48	41	\$15.63	41	\$15.78	44
Greece	\$14.43	43	\$10.97	48	\$13.28	45	\$15.26	45
Peru	\$14.93	39	\$12.08	43	\$12.89	46	\$15.04	46
Colombia	\$13.93	45	\$11.02	47	\$12.76	47	\$14.19	47
Iran	\$10.46	49	\$10.81	49	\$11.58	49	\$13.69	48
Nigeria	\$12.95	48	\$11.72	45	\$11.59	48	\$13.46	49
Romania	\$9.82	50	\$9.17	50	\$11.11	50	\$12.71	50
Hungary	\$9.42	51	\$7.75	51	\$9.75	51	\$10.67	51
Bangladesh	\$6.89	59	\$7.61	52	\$8.86	52	\$9.94	52
Pakistan	\$7.36	55	\$6.85	54	\$8.64	53	\$9.52	53
Costa Rica	\$8.61	52	\$6.86	53	\$7.59	54	\$9.20	54
Slovakia	\$8.55	53	\$6.21	58	\$7.08	58	\$8.45	55
Ecuador	\$8.25	54	\$6.68	55	\$7.39	55	\$8.40	56
Kazakhstan	\$7.17	56	\$6.33	57	\$7.09	57	\$7.93	57
Morocco	\$6.97	58	\$5.53	59	\$6.24	60	\$7.88	58
Algeria	\$7.16	57	\$6.53	56	\$7.17	56	\$7.60	59
Croatia	\$5.77	63	\$4.47	63	\$6.10	61	\$7.49	60
Panama	\$6.47	60	\$5.03	62	\$5.98	62	\$7.16	61
Kuwait	\$6.14	62	\$5.24	61	\$5.86	63	\$6.77	62
Kenya	\$6.44	61	\$5.49	60	\$6.27	59	\$6.60	63

Wellness Economy Size and Rankings Time Series								
	2019*		2020*		2021		2022	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
Bulgaria	\$4.63	65	\$3.70	66	\$4.39	65	\$4.83	64
Sri Lanka	\$5.55	64	\$4.44	64	\$4.76	64	\$4.58	65
Puerto Rico	\$4.16	66	\$3.81	65	\$4.16	66	\$4.56	66
Dominican Republic	\$3.57	68	\$2.54	74	\$3.29	72	\$4.25	67
Uruguay	\$3.93	67	\$3.14	67	\$3.42	69	\$4.09	68
Slovenia	\$3.56	69	\$2.84	71	\$3.52	67	\$4.04	69
Lithuania	\$3.28	72	\$2.99	68	\$3.48	68	\$3.97	70
Oman	\$3.42	70	\$2.96	69	\$3.36	70	\$3.94	71
Serbia	\$3.33	71	\$2.94	70	\$3.34	71	\$3.75	72
Jordan	\$2.96	74	\$2.47	76	\$2.93	74	\$3.67	73
Tunisia	\$2.81	77	\$2.38	77	\$2.85	75	\$3.15	74
Uzbekistan	\$1.87	89	\$1.75	84	\$2.05	85	\$3.12	75
Qatar	\$2.96	73	\$2.25	78	\$2.40	79	\$3.06	76
Cuba	\$2.88	75	\$2.56	73	\$2.62	77	\$3.04	77
Ghana	\$2.68	78	\$2.64	72	\$3.00	73	\$3.01	78
Tanzania	\$2.44	80	\$2.16	79	\$2.44	78	\$2.88	79
Belarus	\$2.85	76	\$2.49	75	\$2.74	76	\$2.85	80
Azerbaijan	\$2.12	85	\$1.82	83	\$2.12	81	\$2.60	81
Latvia	\$2.04	88	\$1.88	82	\$2.27	80	\$2.54	82
Estonia	\$1.83	91	\$1.67	86	\$2.09	82	\$2.34	83
Angola	\$2.16	83	\$1.61	88	\$1.73	90	\$2.34	84
Cambodia	\$2.51	79	\$1.63	87	\$1.54	94	\$2.26	85
Cyprus	\$2.15	84	\$1.37	94	\$1.85	87	\$2.22	86
Zimbabwe	\$1.24	98	\$1.89	81	\$2.07	83	\$2.19	87
Cote d'Ivoire	\$1.75	92	\$1.90	80	\$2.05	84	\$2.12	88
Iceland	\$2.09	87	\$1.33	95	\$1.80	88	\$2.11	89
Luxembourg	\$2.11	86	\$1.74	85	\$1.97	86	\$2.02	90
Nepal	\$1.86	90	\$1.54	89	\$1.74	89	\$2.02	91
Bolivia	\$1.67	93	\$1.52	90	\$1.72	91	\$1.89	92
Georgia	\$1.44	96	\$0.96	100	\$1.17	99	\$1.84	93
Paraguay	\$1.56	94	\$1.41	92	\$1.56	93	\$1.80	94
Uganda	\$1.55	95	\$1.43	91	\$1.59	92	\$1.78	95

Wellness Economy Size and Rankings Time Series								
	2019*		2020*		2021		2022	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
Bahrain	\$2.21	82	\$1.33	96	\$1.40	97	\$1.68	96
Bosnia & Herzegovina	\$1.43	97	\$1.24	97	\$1.41	96	\$1.50	97
Jamaica	\$1.21	99	\$0.81	104	\$0.97	104	\$1.48	98
Macau	\$2.37	81	\$1.38	93	\$1.54	95	\$1.43	99
Maldives	\$1.09	101	\$0.50	118	\$0.94	105	\$1.40	100
Turkmenistan	\$0.94	107	\$0.99	98	\$1.15	100	\$1.40	101
Albania	\$1.20	100	\$0.98	99	\$1.18	98	\$1.28	102
Nicaragua	\$0.94	106	\$0.84	103	\$0.99	102	\$1.14	103
Trinidad & Tobago	\$1.03	103	\$0.90	102	\$0.97	103	\$1.14	104
Senegal	\$1.00	104	\$0.96	101	\$1.07	101	\$1.13	105
Bahamas	\$1.06	102	\$0.60	111	\$0.86	106	\$1.06	106
Zambia	\$0.93	108	\$0.76	105	\$0.79	107	\$0.95	107
Malta	\$0.89	109	\$0.60	112	\$0.75	108	\$0.92	108
Mauritius	\$0.95	105	\$0.58	113	\$0.58	116	\$0.89	109
Armenia	\$0.75	113	\$0.55	114	\$0.61	114	\$0.82	110
North Macedonia	\$0.74	114	\$0.65	108	\$0.74	110	\$0.82	111
Papua New Guinea	\$0.77	112	\$0.71	106	\$0.75	109	\$0.81	112
Seychelles	\$0.44	126	\$0.24	132	\$0.35	127	\$0.81	113
Moldova	\$0.70	115	\$0.63	109	\$0.69	112	\$0.80	114
Botswana	\$0.82	111	\$0.68	107	\$0.73	111	\$0.79	115
Kyrgyzstan	\$0.62	118	\$0.53	117	\$0.62	113	\$0.74	116
Mongolia	\$0.64	117	\$0.54	116	\$0.59	115	\$0.69	117
Montenegro	\$0.62	119	\$0.36	124	\$0.56	118	\$0.68	118
Rwanda	\$0.54	120	\$0.54	115	\$0.55	119	\$0.62	119
Laos	\$0.83	110	\$0.62	110	\$0.58	117	\$0.60	120
Namibia	\$0.65	116	\$0.47	119	\$0.53	120	\$0.58	121
Aruba	\$0.46	124	\$0.28	128	\$0.42	124	\$0.57	122
Kosovo	\$0.46	123	\$0.40	122	\$0.47	122	\$0.52	123
Benin	\$0.45	125	\$0.46	120	\$0.51	121	\$0.51	124
Fiji	\$0.48	121	\$0.27	130	\$0.27	132	\$0.47	125
Republic of the Congo	\$0.35	130	\$0.43	121	\$0.42	123	\$0.43	126
Gabon	\$0.38	127	\$0.35	125	\$0.37	126	\$0.41	127

Wellness Economy Size and Rankings Time Series								
	2019*		2020*		2021		2022	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
Barbados	\$0.47	122	\$0.27	129	\$0.29	130	\$0.41	128
French Polynesia	\$0.37	129	\$0.30	127	\$0.34	129	\$0.40	129
New Caledonia	\$0.38	128	\$0.37	123	\$0.40	125	\$0.40	130
Equatorial Guinea	\$0.34	131	\$0.33	126	\$0.35	128	\$0.37	131
St. Lucia	\$0.29	134	\$0.14	138	\$0.22	136	\$0.36	132
Belize	\$0.30	132	\$0.16	136	\$0.22	135	\$0.34	133
Brunei	\$0.30	133	\$0.25	131	\$0.27	131	\$0.29	134
U.S. Virgin Islands	\$0.28	135	\$0.23	133	\$0.26	133	\$0.27	135
Curacao	\$0.27	136	\$0.19	134	\$0.23	134	\$0.27	136
Mauritania	\$0.19	138	\$0.18	135	\$0.20	137	\$0.22	137
Eswatini	\$0.19	139	\$0.15	137	\$0.17	138	\$0.17	138
Bhutan	\$0.26	137	\$0.12	139	\$0.13	139	\$0.15	139
Lesotho	\$0.13	140	\$0.11	140	\$0.12	140	\$0.12	140
Grenada	\$0.10	141	\$0.06	141	\$0.07	141	\$0.11	141
St. Vincent & the Grenadines	\$0.08	142	\$0.05	145	\$0.06	143	\$0.08	142
Timor-Leste	\$0.06	145	\$0.06	142	\$0.07	142	\$0.07	143
Solomon Islands	\$0.06	144	\$0.05	144	\$0.05	144	\$0.06	144
Vanuatu	\$0.08	143	\$0.06	143	\$0.05	145	\$0.06	145

* 2019 and 2020 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor. For more information, see the companion GWI report: Global Wellness Economy Monitor 2023.

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

Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

Table 3.6. Wellness Economy and GDP Per Capita (2022)

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Seychelles	\$8,097	1	\$19,466	54
Switzerland	\$5,737	2	\$92,371	4
Iceland	\$5,523	3	\$73,998	8
Aruba	\$5,361	4	\$31,934	35
United States	\$5,321	5	\$76,348	7
Austria	\$4,683	6	\$52,265	15
Australia	\$4,218	7	\$65,526	10
Norway	\$4,197	8	\$106,328	2
Denmark	\$3,846	9	\$66,516	9
New Zealand	\$3,689	10	\$47,208	21
United Kingdom	\$3,342	11	\$45,295	22
Canada	\$3,287	12	\$55,085	13
Finland	\$3,200	13	\$50,655	17
Germany	\$3,195	14	\$48,636	20
Ireland	\$3,172	15	\$103,176	3
Luxembourg	\$3,105	16	\$127,580	1
Hong Kong	\$3,025	17	\$49,226	19
Netherlands	\$2,954	18	\$56,489	11
Sweden	\$2,902	19	\$55,689	12
Singapore	\$2,898	20	\$82,808	6
Maldives	\$2,673	21	\$15,883	59
U.S. Virgin Islands	\$2,585	22	\$39,552	24
Bahamas	\$2,575	23	\$33,121	32
France	\$2,530	24	\$42,409	23
United Arab Emirates	\$2,448	25	\$51,306	16
South Korea	\$2,188	26	\$32,250	34
Macau	\$2,054	27	\$31,539	37
St. Lucia	\$2,018	28	\$11,371	71
Israel	\$2,003	29	\$54,710	14
Croatia	\$1,943	30	\$18,427	55
Japan	\$1,927	31	\$33,822	31
Slovenia	\$1,917	32	\$29,502	39

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Italy	\$1,905	33	\$34,113	30
Curacao	\$1,811	34	\$14,183	63
Taiwan	\$1,789	35	\$32,643	33
Cyprus	\$1,777	36	\$31,466	38
Belgium	\$1,776	37	\$50,114	18
Costa Rica	\$1,775	38	\$13,077	66
Portugal	\$1,767	39	\$24,522	46
Malta	\$1,750	40	\$34,127	29
Estonia	\$1,743	41	\$28,631	42
Spain	\$1,742	42	\$29,421	40
Czech Republic	\$1,713	43	\$27,613	43
Panama	\$1,623	44	\$16,373	58
Kuwait	\$1,585	45	\$38,329	25
Slovakia	\$1,555	46	\$20,890	48
Greece	\$1,444	47	\$20,615	49
Barbados	\$1,439	48	\$19,579	53
New Caledonia	\$1,437	49	\$34,994	28
Puerto Rico	\$1,416	50	\$36,798	27
Lithuania	\$1,400	51	\$25,036	44
Latvia	\$1,351	52	\$22,348	47
French Polynesia	\$1,301	53	\$19,915	51
Uruguay	\$1,195	54	\$20,222	50
Bahrain	\$1,138	55	\$28,785	41
Qatar	\$1,135	56	\$84,425	5
Hungary	\$1,102	57	\$17,301	57
Montenegro	\$1,099	58	\$9,812	80
Poland	\$1,049	59	\$18,280	56
Chile	\$891	60	\$15,095	62
Oman	\$861	61	\$24,772	45
Grenada	\$847	62	\$10,488	76
Belize	\$842	63	\$6,678	91
Malaysia	\$837	64	\$12,364	69
St. Vincent & the Grenadines	\$789	65	\$8,537	83

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Bulgaria	\$747	66	\$13,109	65
Trinidad & Tobago	\$743	67	\$19,718	52
Mauritius	\$709	68	\$10,123	79
Romania	\$671	69	\$15,851	60
Russia	\$658	70	\$15,444	61
Brunei	\$652	71	\$37,667	26
Argentina	\$637	72	\$13,655	64
Mexico	\$577	73	\$10,868	74
China	\$560	74	\$12,814	67
Serbia	\$554	75	\$10,361	77
Saudi Arabia	\$543	76	\$31,850	36
Turkey	\$527	77	\$9,661	81
Jamaica	\$523	78	\$5,846	98
Fiji	\$505	79	\$5,317	101
Georgia	\$495	80	\$6,671	92
Thailand	\$483	81	\$7,651	85
Ecuador	\$466	82	\$6,462	96
Bosnia & Herzegovina	\$465	83	\$7,338	86
Albania	\$463	84	\$6,457	97
Brazil	\$445	85	\$8,995	82
Peru	\$442	86	\$7,094	88
Kazakhstan	\$404	87	\$11,440	70
North Macedonia	\$396	88	\$6,608	94
Dominican Republic	\$378	89	\$10,581	75
South Africa	\$362	90	\$6,694	90
Philippines	\$355	91	\$3,623	114
Jordan	\$325	92	\$4,741	106
Belarus	\$309	93	\$7,860	84
Moldova	\$308	94	\$5,671	99
Botswana	\$300	95	\$7,257	87
Armenia	\$296	96	\$6,584	95
Kosovo	\$296	97	\$5,290	102
Colombia	\$274	98	\$6,664	93

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Cuba	\$271	99	\$11,255	72
Paraguay	\$266	100	\$5,539	100
Azerbaijan	\$256	101	\$6,826	89
Tunisia	\$255	102	\$3,842	112
Namibia	\$224	103	\$4,754	105
Equatorial Guinea	\$219	104	\$10,980	73
Turkmenistan	\$218	105	\$12,500	68
Morocco	\$210	106	\$3,765	113
Sri Lanka	\$206	107	\$3,362	119
Mongolia	\$202	108	\$4,863	103
Vietnam	\$200	109	\$4,087	110
Bhutan	\$193	110	\$3,478	116
Vanuatu	\$177	111	\$3,103	120
Indonesia	\$177	112	\$4,798	104
Gabon	\$172	113	\$10,148	78
Algeria	\$169	114	\$4,315	108
Nicaragua	\$164	115	\$2,387	125
Bolivia	\$155	116	\$3,614	115
Iran	\$155	117	\$4,110	109
Egypt	\$142	118	\$4,563	107
Eswatini	\$139	119	\$3,876	111
Cambodia	\$135	120	\$1,785	135
Zimbabwe	\$134	121	\$2,088	133
Kenya	\$122	122	\$2,278	129
Kyrgyzstan	\$109	123	\$1,626	137
India	\$94	124	\$2,379	127
Ghana	\$90	125	\$2,270	130
Uzbekistan	\$87	126	\$2,280	128
Solomon Islands	\$81	127	\$2,211	131
Papua New Guinea	\$80	128	\$3,477	117
Laos	\$80	129	\$2,047	134
Cote d'Ivoire	\$75	130	\$2,468	124
Republic of the Congo	\$72	131	\$2,547	123

	Wellness Economy Per Capita		GDP Per Capita	
	US\$	Rank	Current US\$	Rank
Nepal	\$66	132	\$1,332	140
Angola	\$66	133	\$3,400	118
Senegal	\$65	134	\$1,554	138
Nigeria	\$62	135	\$2,202	132
Bangladesh	\$58	136	\$2,731	121
Lesotho	\$54	137	\$1,174	143
Timor-Leste	\$54	138	\$2,672	122
Zambia	\$47	139	\$1,424	139
Mauritania	\$47	140	\$2,381	126
Rwanda	\$45	141	\$958	145
Tanzania	\$44	142	\$1,253	142
Pakistan	\$40	143	\$1,658	136
Benin	\$38	144	\$1,297	141
Uganda	\$38	145	\$1,117	144

For more information on the wellness economy data, see the companion GWI report: *Global Wellness Economy Monitor 2023*.

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

Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, April 2023 Edition (GDP data).

**Table 3.7. Wellness Economy and Tourism as a Percent of GDP
(2019 and 2022)**

	Wellness Economy as a % of GDP			Overall Tourism as a % of GDP		
	% of GDP 2019	% of GDP 2022	Rank in 2022	% of GDP 2019	% of GDP 2022	Rank in 2022
Seychelles	26.31%	42.06%	1	39.20%	66.25%	3
Maldives	19.42%	22.56%	2	63.73%	76.34%	2
St. Lucia	13.79%	17.42%	3	26.20%	35.12%	4
Aruba	13.62%	16.34%	4	66.01%	76.99%	1
Costa Rica	13.36%	13.45%	5	6.81%	5.20%	49
Belize	12.49%	11.56%	6	21.11%	14.91%	14
Montenegro	11.19%	11.10%	7	23.84%	21.89%	9
Croatia	9.41%	10.54%	8	21.93%	22.15%	8
Philippines	9.25%	10.14%	9	12.82%	12.56%	20
Panama	9.66%	9.94%	10	8.39%	9.48%	29
Fiji	8.68%	9.71%	11	25.27%	30.32%	6
Curacao	8.77%	9.30%	12	23.05%	19.16%	11
Jamaica	7.65%	9.22%	13	23.63%	31.65%	5
Austria	9.06%	8.98%	14	7.61%	6.66%	42
Grenada	7.83%	8.91%	15	12.61%	14.51%	16
St. Vincent & the Grenadines	8.80%	8.66%	16	15.60%	12.26%	22
Bahamas	8.05%	8.10%	17	31.58%	26.79%	7
Cambodia	9.27%	7.93%	18	20.97%	8.36%	34
Cyprus	8.27%	7.81%	19	13.27%	12.44%	21
New Zealand	8.08%	7.81%	20	12.19%	6.29%	44
Iceland	8.48%	7.58%	21	15.70%	10.06%	27
Jordan	6.56%	7.52%	22	11.06%	13.01%	19
Georgia	8.22%	7.48%	23	23.61%	17.60%	13
Slovakia	8.08%	7.44%	24	12.50%	8.16%	35
United Kingdom	5.96%	7.29%	25	2.48%	2.07%	104
Portugal	6.89%	7.27%	26	11.60%	12.16%	23
Nicaragua	7.49%	7.23%	27	3.73%	2.59%	93
Ecuador	7.63%	7.21%	28	7.99%	3.69%	70
Barbados	8.85%	7.15%	29	14.16%	11.34%	24
Mauritius	6.57%	7.01%	30	14.27%	14.68%	15

	Wellness Economy as a % of GDP			Overall Tourism as a % of GDP		
	% of GDP 2019	% of GDP 2022	Rank in 2022	% of GDP 2019	% of GDP 2022	Rank in 2022
Malaysia	7.82%	6.96%	31	10.32%	4.76%	55
United States	6.76%	6.96%	32	5.36%	3.95%	66
Greece	7.03%	6.96%	33	12.55%	8.39%	33
Albania	7.78%	6.94%	34	17.57%	17.68%	12
South Korea	6.03%	6.78%	35	2.25%	1.64%	115
Tunisia	6.72%	6.77%	36	6.24%	6.23%	45
Kyrgyzstan	7.00%	6.71%	37	14.49%	7.25%	39
Zimbabwe	4.75%	6.64%	38	3.89%	1.91%	107
Germany	6.29%	6.59%	39	3.74%	2.98%	82
Slovenia	6.55%	6.50%	40	6.83%	7.54%	37
Macau	4.30%	6.50%	41	16.37%	8.41%	32
Thailand	7.90%	6.45%	42	16.70%	8.13%	36
Australia	6.60%	6.44%	43	7.18%	4.88%	52
Hungary	5.75%	6.34%	44	7.13%	4.80%	54
Finland	6.44%	6.33%	45	5.43%	3.66%	71
Switzerland	6.13%	6.23%	46	3.47%	3.42%	78
Czech Republic	5.58%	6.21%	47	4.78%	5.07%	50
French Polynesia	6.16%	6.21%	48	16.78%	14.01%	17
Peru	6.43%	6.20%	49	4.25%	2.58%	94
France	5.58%	6.17%	50	7.14%	6.64%	43
Hong Kong	7.34%	6.16%	51	8.33%	1.26%	125
Estonia	5.90%	6.15%	52	7.61%	5.82%	47
Sri Lanka	6.23%	6.08%	53	5.36%	2.14%	103
Latvia	5.95%	6.03%	54	3.66%	2.46%	96
Canada	6.10%	5.98%	55	3.78%	2.15%	102
North Macedonia	5.91%	5.96%	56	4.66%	4.53%	56
Spain	5.46%	5.92%	57	9.44%	8.44%	31
Bosnia & Herzegovina	6.99%	5.89%	58	3.30%	3.65%	72
Denmark	5.18%	5.81%	59	3.79%	4.39%	60
Chile	5.36%	5.81%	60	2.67%	2.18%	100
Vanuatu	8.18%	5.79%	61	11.99%	0.48%	138
U.S. Virgin Islands	6.98%	5.78%	62	28.52%	21.69%	10
Bhutan	10.66%	5.73%	63	18.14%	10.56%	25

	Wellness Economy as a % of GDP			Overall Tourism as a % of GDP		
	% of GDP 2019	% of GDP 2022	Rank in 2022	% of GDP 2019	% of GDP 2022	Rank in 2022
Poland	5.62%	5.73%	64	4.17%	3.59%	74
Morocco	5.41%	5.71%	65	5.04%	4.99%	51
Japan	5.56%	5.70%	66	2.93%	1.73%	112
Kenya	6.41%	5.69%	67	2.19%	1.68%	113
Uruguay	6.42%	5.69%	68	4.20%	4.18%	61
Lithuania	5.99%	5.62%	69	3.03%	2.46%	97
Taiwan	6.24%	5.61%	70	3.70%	1.01%	128
Italy	5.37%	5.57%	71	5.20%	4.46%	59
Kosovo	5.82%	5.56%	72	2.10%	2.81%	85
Moldova	5.97%	5.54%	73	4.08%	2.16%	101
Bulgaria	6.72%	5.42%	74	9.92%	6.19%	46
South Africa	5.80%	5.35%	75	3.50%	2.76%	87
Serbia	6.47%	5.28%	76	3.03%	3.78%	67
Netherlands	4.45%	5.26%	77	4.24%	3.71%	68
Mexico	4.74%	5.21%	78	12.08%	10.32%	26
Sweden	5.08%	5.19%	79	6.06%	5.30%	48
Malta	5.62%	5.15%	80	12.17%	9.52%	28
Nepal	5.43%	5.02%	81	2.59%	1.86%	109
Lesotho	5.46%	5.00%	82	4.83%	3.71%	69
Brazil	5.88%	4.98%	83	4.05%	2.54%	95
Turkey	5.38%	4.96%	84	6.92%	4.88%	53
Rwanda	5.24%	4.92%	85	4.37%	3.99%	64
Vietnam	5.25%	4.82%	86	6.26%	2.70%	88
Namibia	5.19%	4.66%	87	4.42%	2.68%	89
Argentina	4.83%	4.66%	88	2.33%	1.34%	123
United Arab Emirates	4.23%	4.55%	89	7.87%	13.48%	18
Bolivia	4.05%	4.38%	90	3.30%	2.78%	86
China	4.89%	4.37%	91	6.64%	1.82%	111
Paraguay	4.11%	4.37%	92	2.65%	1.55%	117
Russia	5.16%	4.27%	93	2.12%	1.10%	126
Armenia	5.48%	4.22%	94	11.35%	8.82%	30
Romania	3.91%	4.21%	95	2.25%	2.90%	83
Ghana	3.92%	4.13%	96	1.66%	1.43%	121

	Wellness Economy as a % of GDP			Overall Tourism as a % of GDP		
	% of GDP 2019	% of GDP 2022	Rank in 2022	% of GDP 2019	% of GDP 2022	Rank in 2022
Colombia	4.31%	4.13%	97	5.30%	3.24%	80
Botswana	4.90%	4.12%	98	3.57%	1.83%	110
Senegal	4.29%	4.11%	99	2.36%	0.96%	129
Trinidad & Tobago	4.34%	4.08%	100	7.66%	6.83%	40
Mongolia	4.53%	4.07%	101	5.57%	1.88%	108
Norway	5.01%	3.95%	102	3.52%	2.89%	84
Laos	4.45%	3.93%	103	8.91%	2.62%	91
Puerto Rico	3.96%	3.92%	104	3.61%	3.39%	79
India	3.96%	3.91%	105	5.23%	4.10%	62
Belarus	4.42%	3.89%	106	6.19%	3.96%	65
Algeria	4.17%	3.89%	107	0.40%	0.52%	137
Iran	4.33%	3.89%	108	3.86%	1.02%	127
Uzbekistan	3.11%	3.88%	109	3.15%	2.00%	106
Dominican Republic	4.01%	3.78%	110	8.65%	7.27%	38
Bahrain	5.71%	3.78%	111	28.61%	6.78%	41
Eswatini	4.27%	3.74%	112	2.87%	1.50%	118
Tanzania	4.02%	3.73%	113	4.93%	4.07%	63
Azerbaijan	4.41%	3.72%	114	7.19%	2.64%	90
New Caledonia	3.86%	3.71%	115	2.99%	1.57%	116
Solomon Islands	3.65%	3.69%	116	5.19%	0.44%	139
Indonesia	3.91%	3.69%	117	3.30%	3.62%	73
Kuwait	4.51%	3.67%	118	0.41%	0.30%	140
Israel	3.61%	3.66%	119	3.25%	3.15%	81
Uganda	4.07%	3.64%	120	3.30%	2.25%	99
Belgium	3.42%	3.56%	121	3.45%	3.48%	76
Kazakhstan	3.95%	3.51%	122	1.95%	1.47%	120
Singapore	3.91%	3.50%	123	6.85%	2.07%	105
Oman	3.88%	3.44%	124	8.20%	4.51%	57
Republic of the Congo	2.71%	3.43%	125	0.26%	0.12%	143
Egypt	4.38%	3.32%	126	6.65%	2.59%	92
Zambia	3.99%	3.32%	127	3.48%	1.67%	114
Ireland	3.47%	3.05%	128	4.08%	2.35%	98
Cote d'Ivoire	2.93%	3.02%	129	1.04%	0.65%	134

	Wellness Economy as a % of GDP			Overall Tourism as a % of GDP		
	% of GDP 2019	% of GDP 2022	Rank in 2022	% of GDP 2019	% of GDP 2022	Rank in 2022
Benin	3.13%	2.92%	130	1.26%	1.27%	124
Nigeria	2.89%	2.82%	131	1.00%	0.68%	133
Papua New Guinea	3.12%	2.56%	132	2.25%	0.80%	131
Pakistan	2.29%	2.53%	133	1.94%	0.72%	132
Luxembourg	3.02%	2.45%	134	5.26%	4.51%	58
Equatorial Guinea	2.99%	2.23%	135	1.92%	0.65%	135
Bangladesh	1.96%	2.16%	136	0.26%	0.11%	144
Mauritania	2.39%	2.15%	137	0.48%	0.20%	142
Cuba	2.74%	2.03%	138	2.64%	1.35%	122
Timor-Leste	2.76%	1.96%	139	0.00%	0.00%	145
Angola	2.56%	1.92%	140	1.03%	0.59%	136
Gabon	2.27%	1.87%	141	2.19%	1.47%	119
Turkmenistan	1.78%	1.79%	142	1.41%	0.90%	130
Saudi Arabia	2.03%	1.78%	143	5.03%	3.45%	77
Brunei	2.19%	1.76%	144	1.77%	0.25%	141
Qatar	1.68%	1.36%	145	8.46%	3.58%	75

Tourism figures include international/inbound and domestic trip expenditures. For more information on the wellness economy data, see the companion GWI report: *Global Wellness Economy Monitor 2023*.

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

Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, April 2023 Edition (GDP data); Euromonitor (tourism data).

Appendix:

Wellness Economy Definitions

This Appendix provides overall definitions for the wellness economy and its eleven sectors. For more details on the Global Wellness Institute's detailed definitions and measurement methodology for individual sectors, see the companion report, *Global Wellness Economy Monitor 2023*.⁵

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

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

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

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

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

- 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.

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.

⁵ Johnston, K., Yeung, O., and Callender, T. (2023). *Global Wellness Economy Monitor 2023*. Miami, FL: Global Wellness Institute. <https://globalwellnessinstitute.org/the-2023-global-wellness-economy-monitor/>.

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

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

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

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

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

Thermal/mineral springs: Encompasses the revenues of business establishments associated with the wellness, recreational, and therapeutic uses of water with special properties, including thermal water, mineral water, and seawater.

Acknowledgements

It has been fifteen years since we began defining and measuring the various sectors of the wellness economy. Quantifying the global wellness economy is a tremendous undertaking that requires massive research, data, expertise, and insights in eleven diverse wellness sectors, across all regions/countries of the world. This update is all the more important because it shows how the wellness world has responded to the COVID-19 pandemic and its aftermath. We want to give special thanks to **Victor Koo, Liu Xi, and Hong Lulu** of Tianren Culture for assisting in researching multiple wellness sectors for the vast Chinese economy. We express special appreciation to **Tomonori Maruyama** of Mitsui Knowledge Industry Co. for his help in accessing and analyzing data in the Japanese spa, hot springs, and hospitality sectors. We extend special thanks to **Mia Kyricos, Mark Hennebry, and Charles Davidson** for sharing their industry knowledge and insights. We have also benefited from the expert presentations at the **Wellness Real Estate and Communities Symposium 2023** in New York City, as well as the **Hot Springs Symposium 2023** sponsored by GWI's Hot Springs Initiative in Australia. We thank **Beth McGroarty** for her invaluable expertise on global wellness industry trends. Last but not least, we thank **Susie Ellis** and **Nancy Davis** for being the most steadfast champions of this work, and for making this study and important country data available to the public through the support of the GWI Geography of Wellness partners.

Geography of Wellness Partners

The Geography of Wellness is a groundbreaking new GWI initiative focusing on providing robust wellness market data for select countries around the world. GWI is the leading source of global wellness industry data. Through the support of an exclusive country partnership, wellness sector data for individual countries is made available to the public for the first time. Each country's wellness economy data is presented on a dedicated country webpage, as well as in a detailed *Wellness Economy Country Report*, which shows the trajectory of the wellness economy, the composition of the country's wellness economy, and other exclusive data by sector and subsector. **For more information on becoming a Geography of Wellness partner, see: <https://globalwellnessinstitute.org/geography-of-wellness/become-a-partner/>.**



AG7
Brazil leads the Latin America-Caribbean region in the wellness economy, with beaches, mountains to trek, mineral springs to bath in, and incredible Amazonian adventures to partake. AG7 recognizes the importance of evangelizing and embracing the country's entire wellness ecosystem. AG7 is the first Wellness Building Platform in Brazil, operating as developers, asset managers, private equity real estate investors and property managers. A pioneer in combining the concepts of health, modern architecture and well-being, AG7 develops and invests in innovative and sustainable housing for families and individuals. Visit www.ag7.co



BDMS WELLNESS CLINIC
Thailand has gained international recognition in preventive medical treatments for its quality services at an accessible price. As Thailand's largest private healthcare network, Bangkok Dusit Medical Services (BDMS) provides advanced medical-based wellness services at the flagship wellness center, BDMS Wellness Clinic. Building on 50 years of tertiary level medical experience from its network of 54 hospitals, BDMS group extends its strengths and medical expertise to help consumers improve their wellness through a wide range of programs specifically focused on the early detection and prevention of disease. Visit www.bdmswellness.com.



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Blueprint Global is a distinguished international leader, renowned for its unparalleled track record in successfully crafting, structuring, and bringing to market some of the world's most exceptional real estate developments. Our unique, fully integrated project planning and execution services, marketing expertise and distribution platform have consistently delivered success in realizing a multitude of complex urban, recreational, and mixed-use real estate projects for our valued clients and partners. Blueprint Global's impact extends to diverse landscapes, including mountain resorts, beach destinations, vibrant urban centers, wellness-focused developments, and cutting-edge retail spaces, as well as unparalleled golf retreats. As global leaders in luxury real estate, we bring a wealth of experience and innovation to every project, ensuring success, and each development becomes a masterpiece that defines sophistication and lifestyle. Visit www.blueprint.global



CONCEPTASIA AND FUKUI WELLNESS COLLABORATION

Conceptasia is a consulting and research service that assists spa and hotel brands to develop and launch wellness offerings in the Asian markets. Conceptasia's services include spa and wellness management and operation, consumer research, and a B2B network providing wellness and beauty information. The company has offices in Tokyo and Singapore and was founded more than two decades ago by Yoriko Soma, a pioneer in the Japan wellness industry with 20 years of experience in the spa and beauty industry. Visit www.conceptasia.jp. Fukui Wellness Collaboration is an organization focused on developing wellness tourism offerings in the Fukui Prefecture region, including Eiheiji City, where the sacred Temple of Eternal Peace is located. Visit <https://enjoy.pref.fukui.lg.jp/en/>.



THE MINISTRY OF TOURISM AND CREATIVE ECONOMY, REPUBLIC OF INDONESIA

The Ministry of Tourism and Creative Economy (MOTCE), Republic of Indonesia (RI) is focusing on the quality of tourism experiences and concepts in Indonesia, as well as developing special-interest tourism, sports tourism, and MICE tourism. Wellness tourism, as one of the flagships in the special-interest tourism segment, will be strengthened to support the long-term goal of Indonesia as a sustainable and globally integrated tourist destination. MOTCE RI has a vision of becoming a global wellness tourism destination and a globally recognized wellness product-producing country. Visit www.indonesia.travel



NATIONAL ACADEMY OF SPORTS MEDICINE

For over 35 years, the National Academy of Sports Medicine (NASM) has earned its reputation as the gold standard in fitness education with best-in-class evidence-based programs in personal training, nutrition coaching, wellness coaching, sports performance, and more. Above and beyond any other certification provider, NASM trainers work at every level of organized sport while NASM wellness coaches inspire lasting change in their clients and co-workers across fitness, healthcare, pharmaceutical, and human resource organizations. Visit www.nasm.org



THE PHILIPPINES DEPARTMENT OF TOURISM

The Philippines Department of Tourism has embraced the growing trend of wellness tourism, recognizing the potential for the country's natural beauty and diverse landscapes to serve as a holistic destination. With a focus on promoting health and well-being, the department has strategically positioned the Philippines as an ideal location for rejuvenation and relaxation. From pristine beaches to lush mountains, the country offers a variety of settings for wellness activities such as spa retreats, yoga, and eco-friendly adventures. Visit www.tourism.gov.ph.



THE SINGAPORE TOURISM BOARD

The Singapore Tourism Board (STB) is a statutory board under the Ministry of Trade and Industry of Singapore. It champions the development of Singapore's tourism sector, one of the country's key service sectors and economic pillars, and undertakes the marketing and promotion of Singapore as a tourism destination. Singapore has actively promoted wellness tourism through various initiatives, leveraging its reputation as a global business and travel hub. The city-state strategically combines its modern infrastructure with green spaces and cultural offerings to attract wellness-conscious travelers. Singapore's commitment to providing a diverse range of wellness experiences aligns with the growing global interest in health and well-being. Visit www.stb.gov.sg.



THERME GROUP

Therme Group views wellbeing not as the individual pursuit of luxury but as intimately linked to community, culture, and the natural world. Its landmark entertainment and wellbeing destinations offer guests a unique immersive environment, based in ancient traditions of thermal bathing and delivered with modern technology. This unique blended experience includes water-based activities with fitness programming, attractions, wellbeing therapies, arts and culture, botanics, and food and nutrition. Therme Group sees a positive future for cities as places of inclusive urban wellbeing, where Therme supports people to live healthier and more fulfilling lives. Visit www.thermegroup.com.

**WE ACKNOWLEDGE AND THANK OUR
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National Academy of Sports Medicine

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The Singapore Tourism Board

Therme Group



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

WWW.GLOBALWELLNESSINSTITUTE.ORG