



GLOBAL WELLNESS
INSTITUTE™
EMPOWERING WELLNESS WORLDWIDE

The Global Wellness Economy: Country Rankings

Data for 2019-2024

January 2026

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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 (2019-2024) was prepared by Katherine Johnston, assisted by Joanne Hopkins, 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 eighteen years. Their academic and professional background is in economic analysis, international development, and public policy. Ms. Johnston, Ms. Hopkins, Ms. Yeung, and Ms. Callender received post-graduate degrees from Georgetown, Johns Hopkins, Princeton, and Harvard Universities, respectively. Together, they bring many decades of experience conducting industry research, impact assessments, policy analysis, and strategy development for countries, regions, industry consortia, companies, and non-profit 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 began measuring the size of the global wellness economy more than ten years ago, when we published the first edition of the *Global Spa & Wellness Economy Monitor* and estimated wellness as a \$3.4 trillion industry in 2013. To our knowledge, this was the first time 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, and 2019-2024. 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.
- 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).
- 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).

Our wellness economy framework and data are grounded in our numerous in-depth, sector-level studies, starting with our very 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

The global wellness economy data presented in this report are for the years 2019-2024. The definitions, conceptual frameworks, and estimation models for each of the wellness sectors are developed by the authors under the auspices of GWI, consistent with the data and methodologies used in prior GWI studies over the last eighteen 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 2025, 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), Health & Fitness Association (HFA/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.

Note the 2019-2023 wellness economy figures presented in this report have been revised and are slightly different from the figures presented in the previous editions of the *Global Wellness Economy Monitor* 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 used for making GWI's estimates for certain sectors and subsectors.

For more details on the data presented in this report, including global/regional data and sectoral breakdowns, see: *Global Wellness Economy Monitor 2025*, <https://globalwellnessinstitute.org/2025-global-wellness-economy-monitor/>.

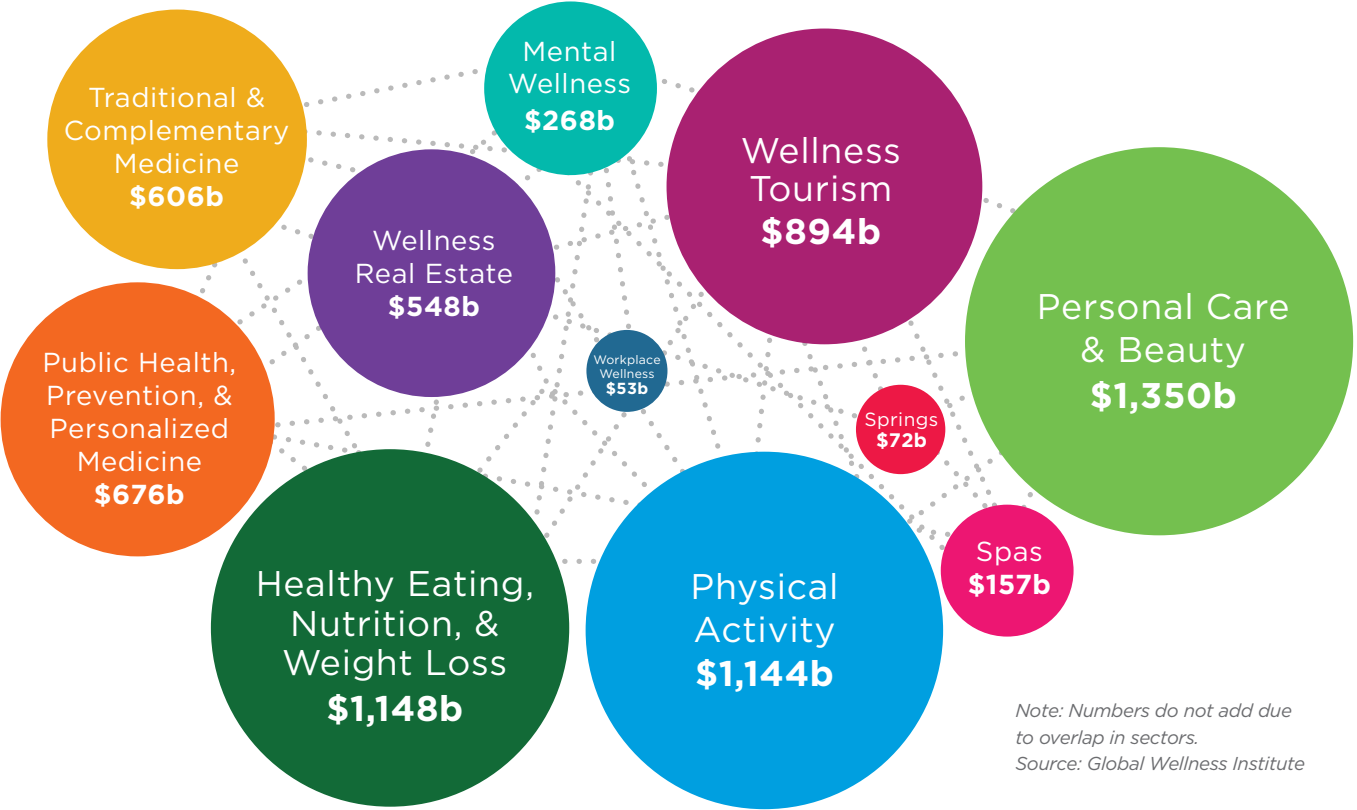
CHAPTER 1

The Global Wellness Economy



Figure 1.1

GLOBAL WELLNESS ECONOMY:
\$6.8 trillion in 2024



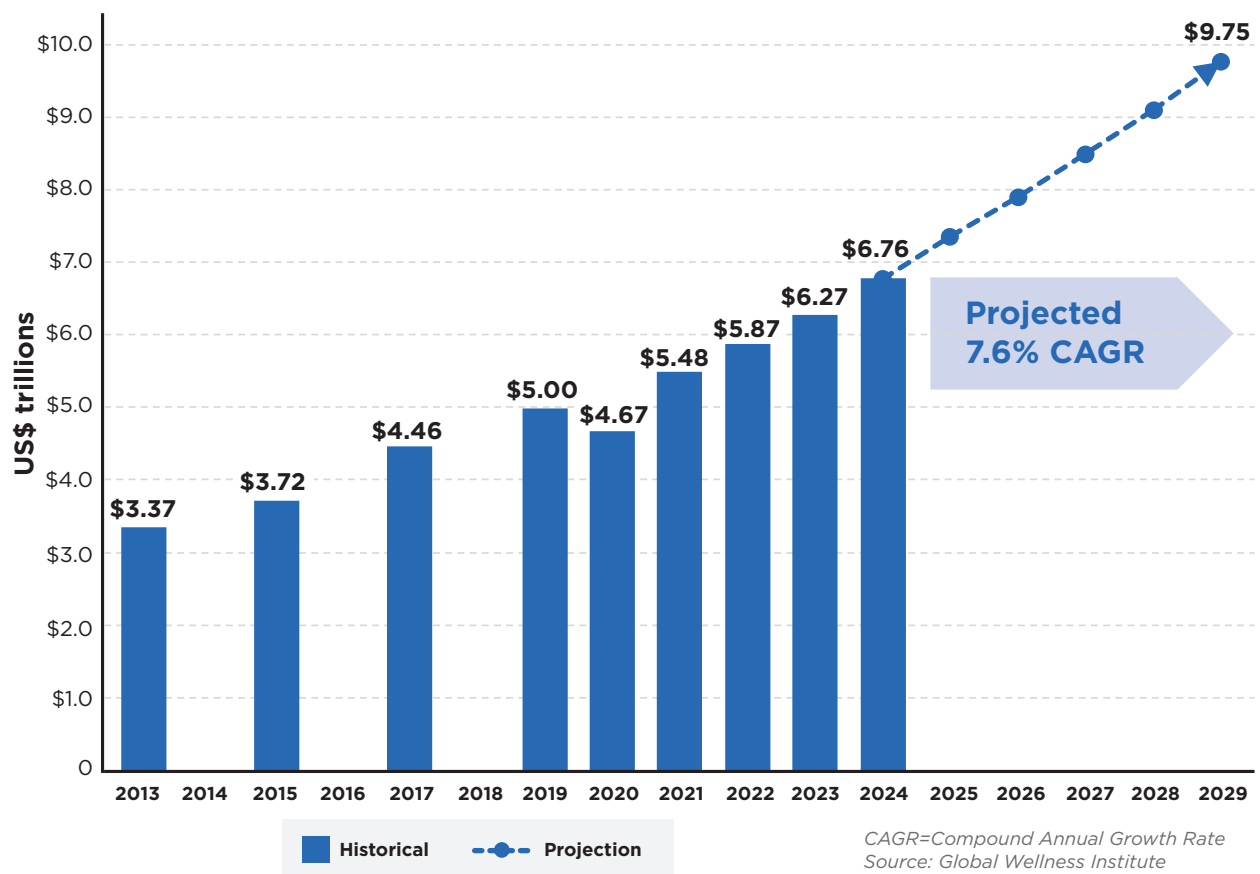
The global wellness economy has doubled in size in just eleven years, reaching a new peak of \$6.8 trillion in 2024.

In 2024, the global wellness economy stands at \$6.8 trillion, growing by 7.9% from 2023-2024. After a downturn in 2020 due to the pandemic, the wellness economy recovered quickly and has expanded at a robust pace ever since (see *Figure 1.2*). Worldwide, spending on wellness is now 35% higher than in 2019, and it is more than double the level in 2013 (when GWI first started measuring the wellness economy). Looking at the five-year trend since before the pandemic, the global wellness economy has been increasing at an average annual rate of 6.2% from 2019-2024, a growth trend that is significantly faster than the global GDP growth rate of 4.7%.¹

With its rapid post-pandemic recovery and a growth rate that has consistently been faster than economic growth, the global wellness economy has also been expanding in its share of the overall economy. In 2024, the wellness economy represented 6.12% of global GDP, as compared to only 5.67% in 2019.

For the next five years, we project the global wellness economy will grow at a robust rate of 7.6% annually, a growth rate substantially higher than the projected global GDP growth of 4.5% (according to IMF forecasts). The wellness economy is expected to reach nearly \$7.4 trillion in 2025 and will grow to nearly \$9.8 trillion in 2029.

Figure 1.2: Global Wellness Economy Market Size and Growth Projections, 2013-2029



¹ Global GDP data from: IMF, *World Economic Outlook Database*, April 2025 Edition, <https://www.imf.org/en/Publications/WEO/weo-database/2025/april>.

Regional Wellness Economy Analysis

Key Findings

- The wellness economy is heavily concentrated, with North America, Asia-Pacific, and Europe together accounting for nearly 90% of all global spending in 2024.
- 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 146% of its 2019 size), Middle East-North Africa (142%), and Europe (136%).
- These three regions have also posted the highest growth rates over the last five years, with North America's wellness economy growing by 7.9% annually from 2019-2024, Middle East-North Africa growing by 7.2% annually, and Europe growing by 6.3% annually.
- Asia-Pacific was one of the slowest-growing regions in 2021, 2022, and 2023 (partly due to the prolonged impacts of the pandemic), although regional growth bumped up to 9.3% in 2023-2024. Currency depreciation against the U.S. dollar (especially for the Japanese yen) has dampened Asia's market growth when it is expressed in dollar terms. When measured in yen, the Asia-Pacific wellness market is now at 174% of its pre-pandemic level, as compared to only 125% when measured in U.S. dollars.
- Per capita spending on wellness is significantly higher in North America (\$6,029 in 2024) and Europe (\$1,876) than in other regions of the world, reflecting both the level of wealth and the overall development of the wellness economies in these two regions.
- Globally, per capita spending on wellness (\$831 in 2024) is higher than the average consumer out-of-pocket spending on health goods/medical services (\$806). At the regional level, per capita spending on wellness is also higher than consumer out-of-pocket spending on healthcare across every region except North America.
- Globally, per capita spending on wellness has been growing at a faster rate than the average consumer out-of-pocket spending on health goods/medical services (5.3% CAGR for wellness per capita in 2019-2024, versus 4.9% for healthcare per capita).

WELLNESS ECONOMY BY REGION

The global wellness economy is heavily concentrated in North America, Asia-Pacific, and Europe.

North America (\$2.3 trillion), Asia-Pacific (\$2.0 trillion), and Europe (\$1.7 trillion) together account for nearly 90% of the entire global wellness economy in 2024. In the last few years, North America has surpassed Asia-Pacific to become the largest regional wellness economy (see *Figure 2.1*). This shift has occurred due to prolonged pandemic effects and slower growth in some major Asian markets in 2020-2022, as well as currency depreciation in 2022-2024 (see further discussion on *Page 6*).

It is important to keep in mind that some of the wellness sectors are “export industries” (i.e., selling services to people who are not residents of the country in which the business is located). For example, about 29% of all *wellness tourism* expenditures are from international travel; likewise, a significant portion of revenues in *thermal/mineral springs* and some types of *spas* come from international visitors. Therefore, not all of the wellness spending shown in *Figure 2.1* for each region is made by residents of that region.

Figure 2.1: Wellness Economy by Region, 2019-2024

	Wellness Economy						Average Annual Growth Rate	
	(US\$ billions)						2023-2024	2019-2024
	2019*	2020*	2021*	2022*	2023*	2024		
North America	\$1,570.0	\$1,528.2	\$1,814.3	\$2,042.9	\$2,158.2	\$2,299.6	6.6%	7.9%
Asia-Pacific	\$1,623.9	\$1,531.1	\$1,731.1	\$1,755.6	\$1,861.1	\$2,034.4	9.3%	4.6%
Europe	\$1,284.8	\$1,158.5	\$1,425.1	\$1,478.0	\$1,594.8	\$1,742.6	9.3%	6.3%
Latin America-Caribbean	\$304.9	\$247.5	\$288.9	\$340.6	\$386.0	\$402.8	4.3%	5.7%
Middle East-North Africa	\$134.2	\$131.9	\$146.0	\$164.2	\$175.3	\$190.1	8.5%	7.2%
Sub-Saharan Africa	\$77.5	\$72.1	\$78.7	\$88.4	\$91.9	\$94.0	2.3%	3.9%
WORLD	\$4,995.4	\$4,669.4	\$5,484.1	\$5,869.7	\$6,267.4	\$6,763.6	7.9%	6.2%

* 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.

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

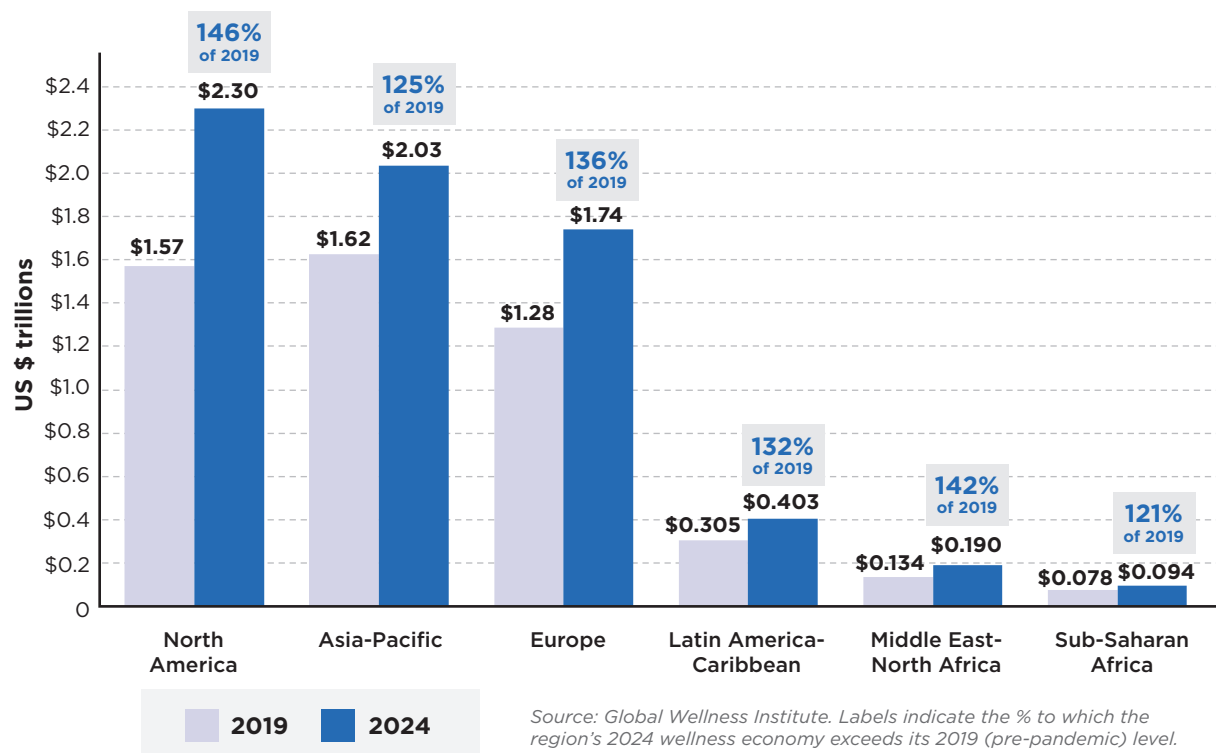
Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

GROWTH TRENDS BY REGION (2019-2024)

North America, Middle East-North Africa, and Europe are the fastest-growing regional wellness economies over the last five years.

It can be challenging to compare the regional growth rates in 2020-2024 as a metric for which markets have been growing the fastest, because the growth trends during this period reflect recovery from the pandemic dip in 2020 (i.e., regions with the greatest declines in 2019-2020 are likely to have higher growth rates in 2021-2024). A better metric for growth is to examine the extent to which each region has surpassed its pre-pandemic level (see *Figure 2.2*). **As of 2024, North America, Middle East-North Africa, and Europe have shown the strongest resilience, recovery, and growth since before the start of the pandemic, with all three regions now exceeding their 2019 levels of spending by more than 35%.** These three regions have also posted the highest growth rates over the last five years, with North America's wellness economy growing by 7.9% annually from 2019-2024, Middle East-North Africa growing by 7.2% annually, and Europe growing by 6.3% annually (see *Figure 2.1*).

Figure 2.2: Size and Recovery of the Wellness Economy by Region, 2019 Versus 2024



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

Asia-Pacific was one of the slowest-growing regions in 2021, 2022, and 2023, although regional growth bumped up to 9.3% in 2024. The prolonged travel restrictions and pandemic impacts across Asia-Pacific and the sluggish economic conditions in China led to a severe downturn in tourism-related sectors (*wellness tourism, spas, thermal/mineral springs*), which lasted longer than in other regions. Other sectors closely linked with consumer spending (*healthy eating, personal care & beauty, physical activity, traditional & complementary medicine*) have also been growing relatively slowly in the Asia-Pacific region, a trend that is largely due to the effects of currency depreciation in 2022-2024 across all of the region's largest wellness markets (including China, Japan, India, Australia, South Korea, Taiwan, and Indonesia).² The depreciation of the Japanese yen has especially dampened the Asia-Pacific market growth and recovery when it is expressed in U.S. dollar terms (since Japan is such a large share of the overall region)—when measured in yen, the Asia-Pacific market is at 174% of its pre-pandemic level, as compared to 125% when measured in dollars.

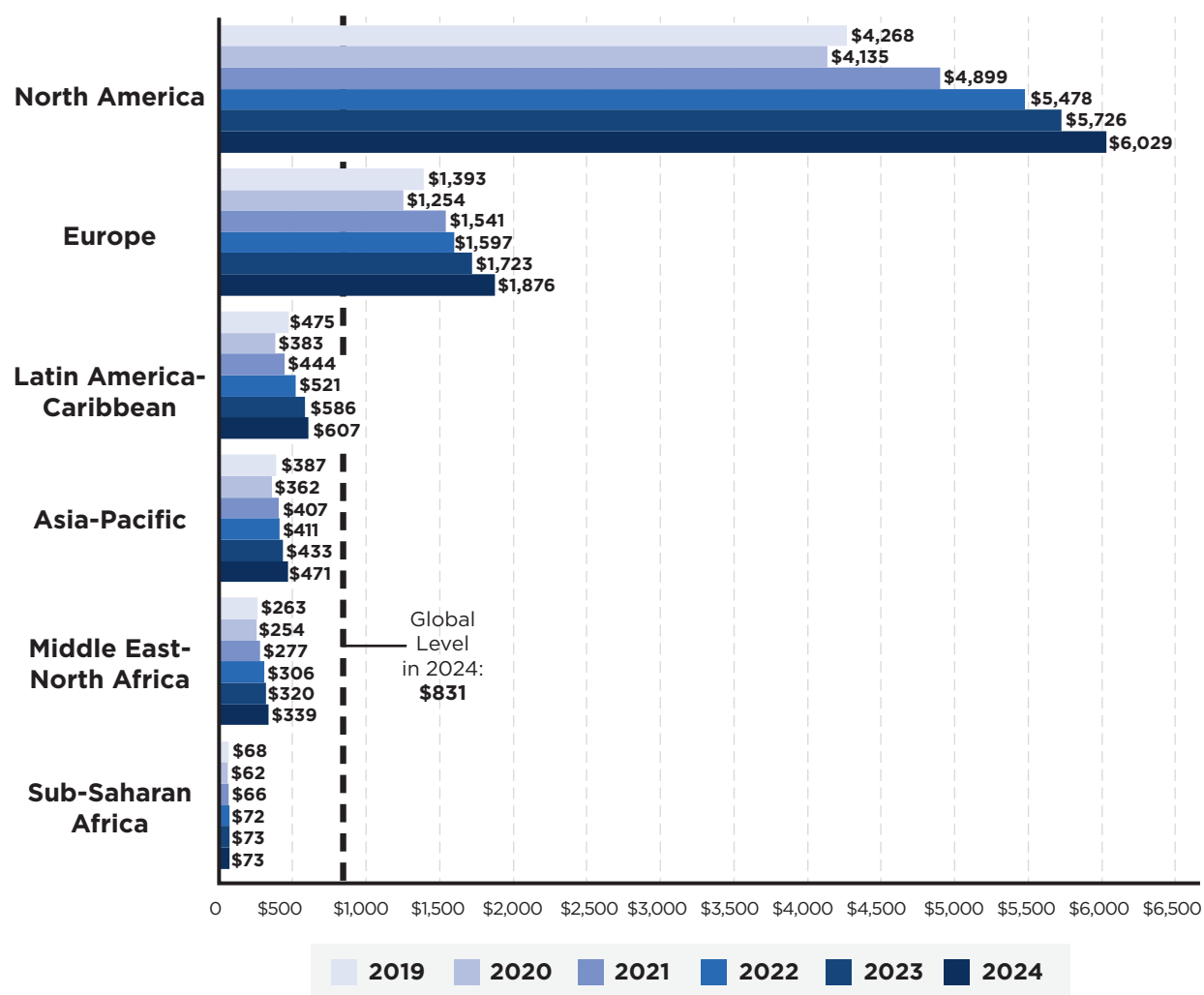
² Note: See the *Global Wellness Economy 2025* report for more details on regional growth trends and currency depreciation impacts across specific wellness sectors.

REGIONAL WELLNESS SPENDING PER CAPITA

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

Per capita spending on wellness is significantly higher in North America (\$6,029 in 2024) and Europe (\$1,876) 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 As shown in *Figure 2.3*, spending in the other regions falls below the global average of \$831 per capita in 2024 (e.g., \$607 in Latin America-Caribbean, \$471 in Asia-Pacific, and \$339 in Middle East-North Africa). 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 2024, per capita spending on wellness reached new peak levels across all six regions.

Figure 2.3: Wellness Economy Per Capita by Region, 2019-2024



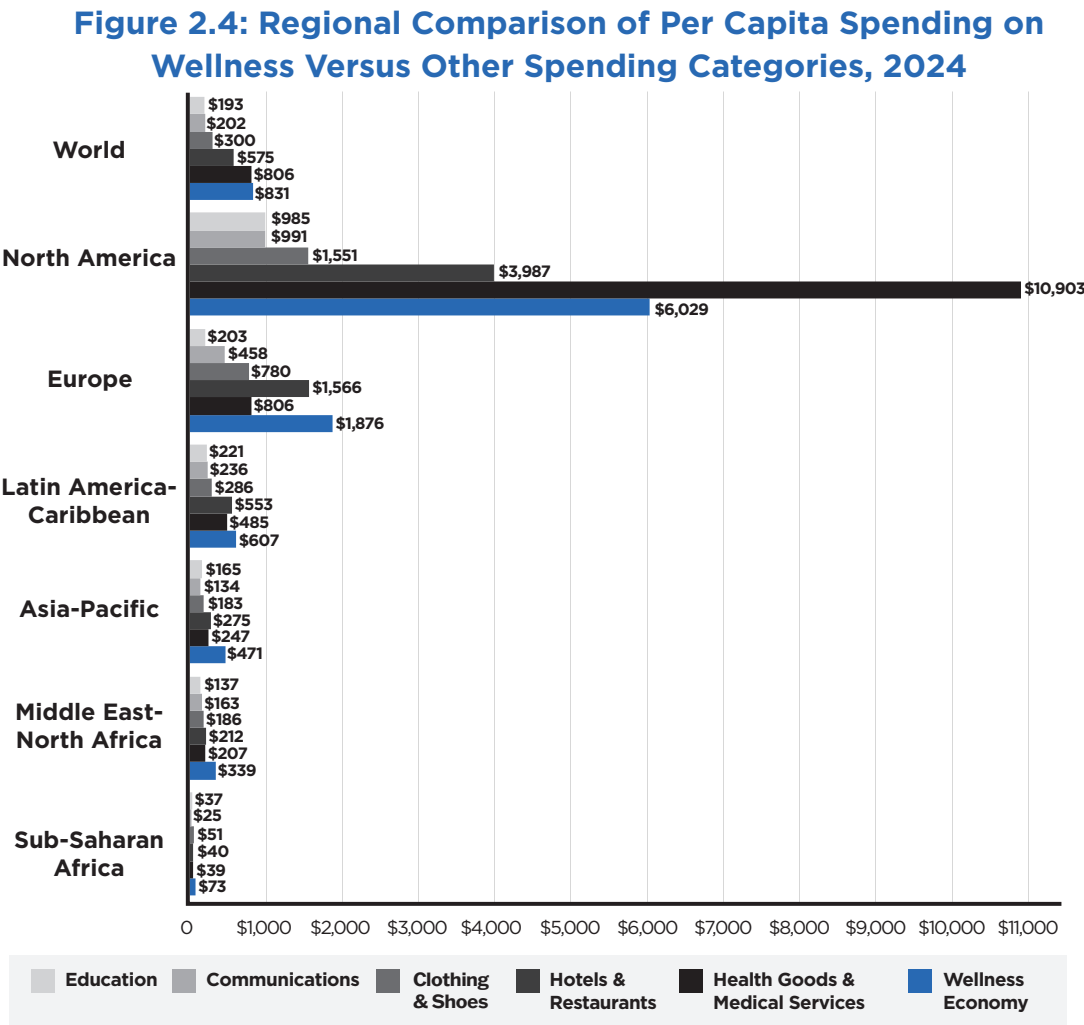
*Note: 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.
Source: Global Wellness Institute and World Bank (population data).*

³ Note 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 \$831 in 2024. Per capita spending on wellness is higher than the average consumer out-of-pocket expenditures on health goods/medical services (\$806), according to Euromonitor data.⁴ Looking 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).

Per capita spending on wellness is also higher than consumer spending on many other categories of goods and services, including hotels/restaurants (\$575 globally), clothing/shoes (\$300), communications (\$202), and education (\$193); this pattern is consistent both at the global level and across every region.



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

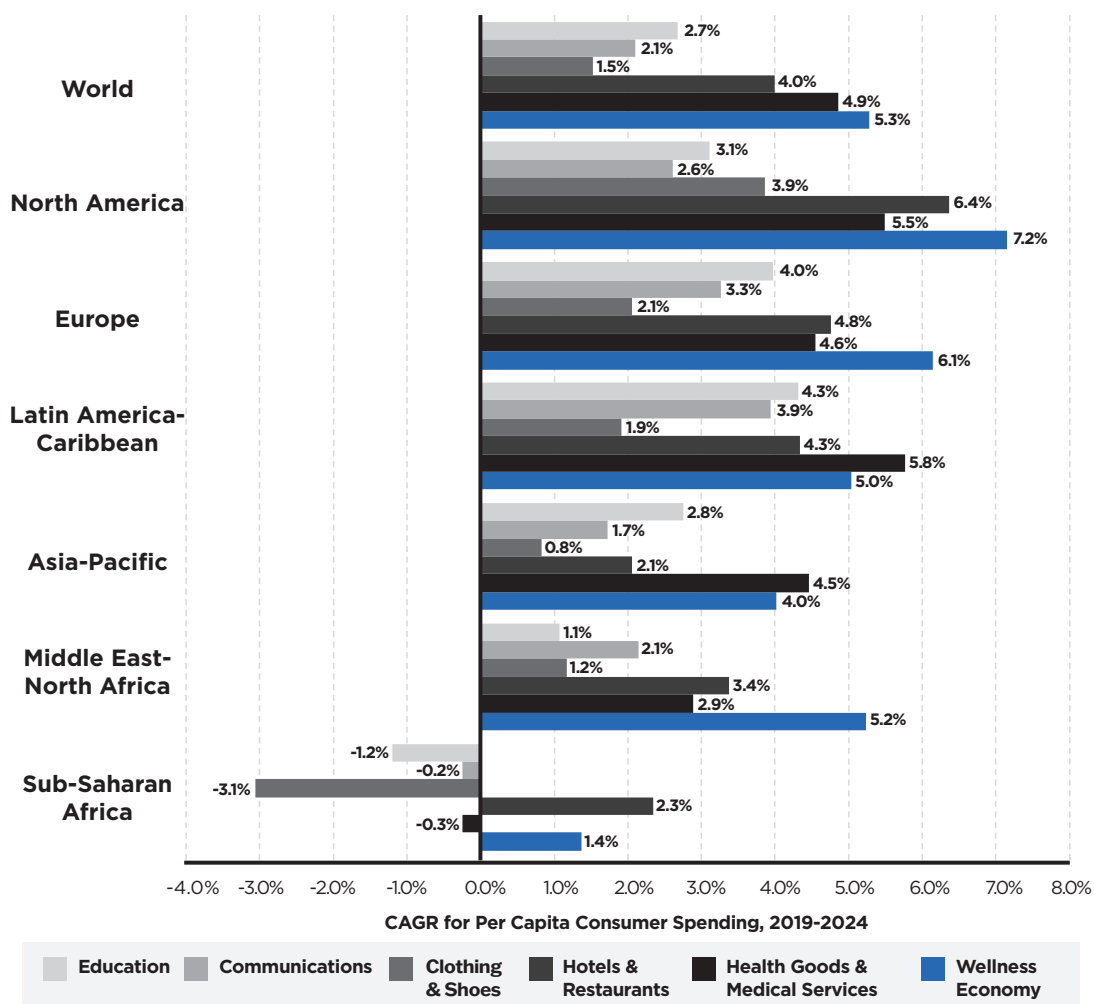
⁴ Note this figure measures consumer out-of-pocket spending only; it is not the same as overall global health expenditures, which encompasses both public and private spending (government, insurance, consumer out-of-pocket, etc.). Overall global health expenditures per capita are estimated by GWI at \$1,377 globally in 2024, based on data from the WHO *Global Health Expenditure Database* (accessed July 24, 2025)—but this figure is not directly comparable to that shown in Figure 2.4, because it comes from a different source with different definitions and measurement methodologies, and it also includes public and insurance spending, not just consumer spending.

Per capita spending on wellness has been growing faster than consumer out-of-pocket spending on healthcare, hotels/restaurants, clothing/shoes, communications, and education (both globally and across many regions).

Worldwide, per capita spending on wellness grew by 5.3% annually from 2019-2024. This growth rate has outpaced the growth in per capita consumer spending on many other categories of goods and services, including health goods/medical services (4.9% annually), hotels/restaurants (4.0%), education (2.7%), communications (2.1%), and clothing/shoes (1.5%).

On a regional level, the five-year annual growth rates for wellness spending per capita have ranged from 1.4% in Sub-Saharan Africa to 7.2% in North America. As shown in *Figure 2.5*, per capita wellness spending growth has outpaced the growth of consumer out-of-pocket expenditures on healthcare in North America, Europe, and Middle East-North Africa (based on Euromonitor data). Wellness is the second-fastest growing category after healthcare in Asia-Pacific and Latin America-Caribbean, and after hotels/restaurants in Sub-Saharan Africa.

Figure 2.5: Regional Comparison of Per Capita Spending on Wellness Versus Other Spending Categories, Average Annual Growth Rates, 2019-2024



Source: Global Wellness Institute and Euromonitor (consumer expenditures data). CAGR = Compound Annual Growth Rate.

Regional Wellness Economy Profiles

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FIGURE 2.6

ASIA-PACIFIC: WELLNESS ECONOMY PROFILE, 2019-2024

Asia-Pacific: Wellness Economy, 2019-2024

	2019*	2020*	2021*	2022*	2023*	2024
Wellness Economy (US\$ billions)	\$1,623.9	\$1,531.1	\$1,731.1	\$1,755.6	\$1,861.1	\$2,034.4
Wellness Economy Per Capita (US\$)	\$387	\$362	\$407	\$411	\$433	\$471
Wellness Economy as a % of Regional GDP	5.23%	4.91%	4.83%	4.90%	5.17%	5.52%
Wellness Economy as a % of Global Total	32.51%	32.79%	31.57%	29.91%	29.70%	30.08%

* 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.

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

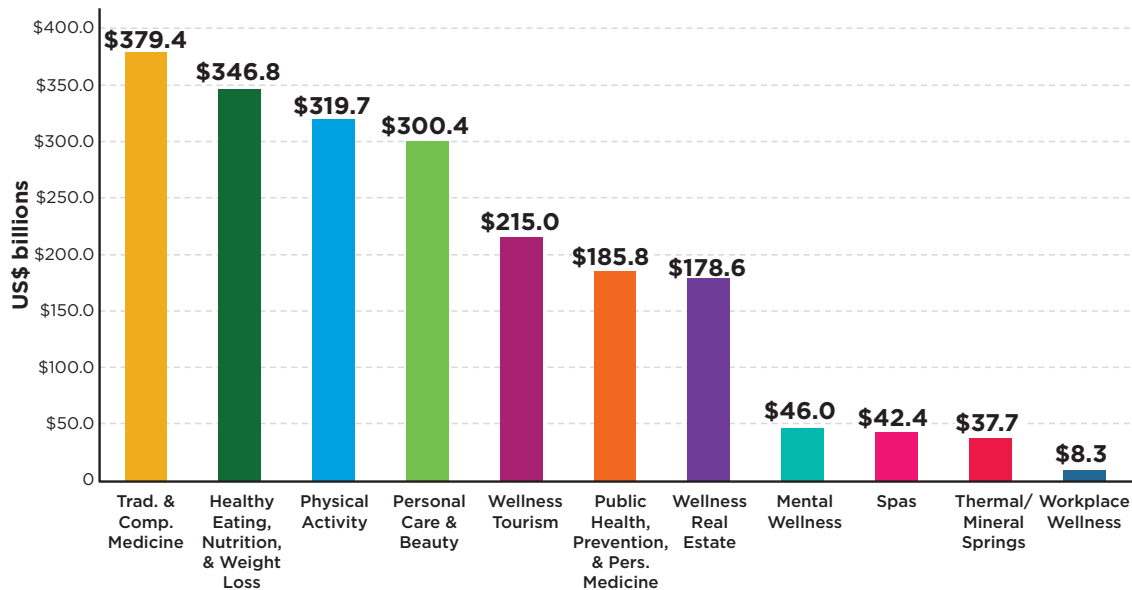
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 45 markets in Asia-Pacific); IMF World Economic Outlook, April 2025 Edition (GDP data); World Bank World Development Indicators (population data).

Asia-Pacific: Top 10 Wellness Markets, 2024

	US\$ billions
China	\$950.19
Japan	\$262.44
India	\$180.14
Australia	\$141.03
South Korea	\$119.26
Taiwan	\$55.81
Indonesia	\$55.77
Philippines	\$47.27
Thailand	\$42.71
Malaysia	\$31.77

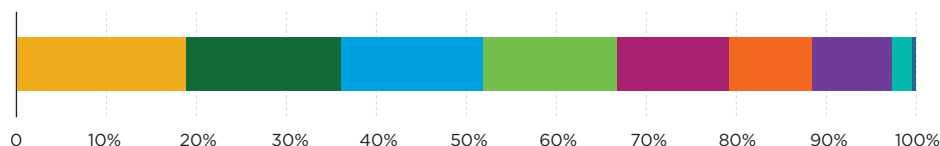
Source: GWI

Asia-Pacific: Wellness Economy Sectors, 2024



Source: Global Wellness Institute

Asia-Pacific: Composition of the Wellness Economy, 2024



Source: Global Wellness Institute

FIGURE 2.7 EUROPE: WELLNESS ECONOMY PROFILE, 2019-2024

Europe: Wellness Economy, 2019-2024

	2019*	2020*	2021*	2022*	2023*	2024
Wellness Economy (US\$ billions)	\$1,284.8	\$1,158.5	\$1,425.1	\$1,478.0	\$1,594.8	\$1,742.6
Wellness Economy Per Capita (US\$)	\$1,393	\$1,254	\$1,541	\$1,597	\$1,723	\$1,876
Wellness Economy as a % of Regional GDP	5.58%	5.20%	5.58%	5.79%	5.77%	5.98%
Wellness Economy as a % of Global Total	25.72%	24.81%	25.99%	25.18%	25.45%	25.77%

* 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.

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

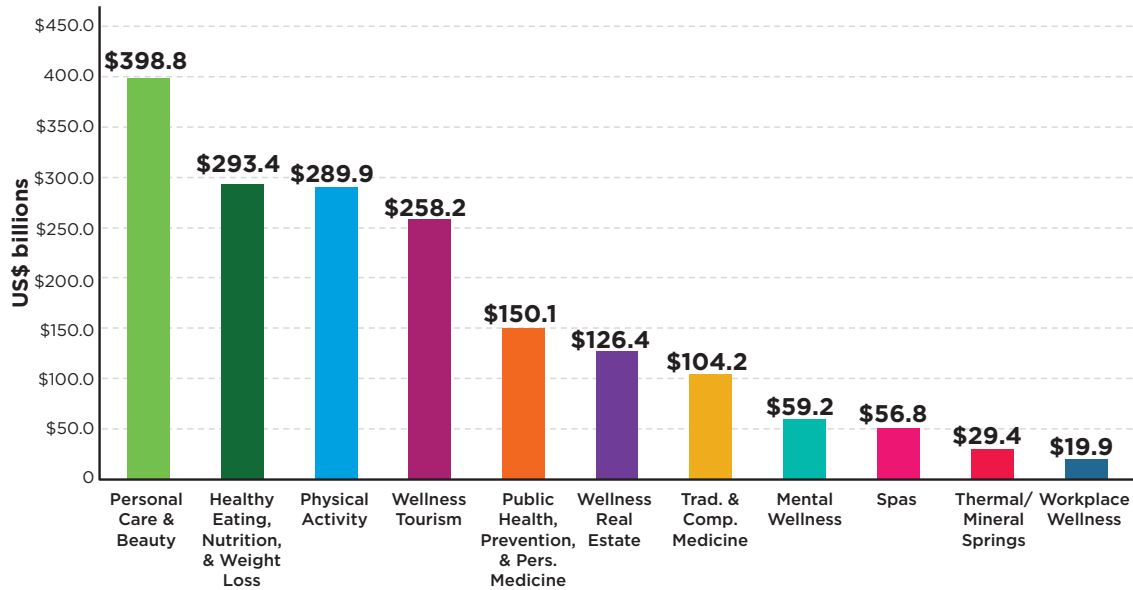
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 55 markets in Europe); IMF World Economic Outlook, April 2025 Edition (GDP data); World Bank World Development Indicators (population data).

Europe: Top 10 Wellness Markets, 2024

	US\$ billions
Germany	\$281.38
United Kingdom	\$261.19
France	\$210.85
Italy	\$140.64
Russia	\$110.25
Spain	\$106.17
Turkey	\$72.69
Netherlands	\$62.23
Switzerland	\$57.59
Poland	\$52.02

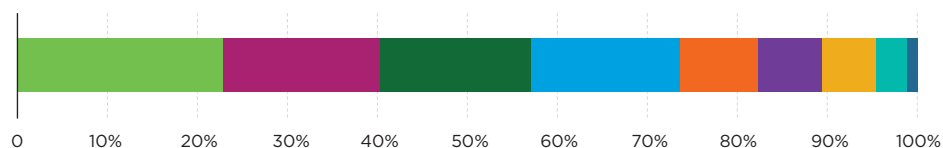
Source: GWI

Europe: Wellness Economy Sectors, 2024



Source: Global Wellness Institute

Europe: Composition of the Wellness Economy, 2024



Source: Global Wellness Institute

FIGURE 2.8 LATIN AMERICA-CARIBBEAN: WELLNESS ECONOMY PROFILE, 2019-2024

Latin America-Caribbean: Wellness Economy, 2019-2024

	2019*	2020*	2021*	2022*	2023*	2024
Wellness Economy (US\$ billions)	\$304.9	\$247.5	\$288.9	\$340.6	\$386.0	\$402.8
Wellness Economy Per Capita (US\$)	\$475	\$383	\$444	\$521	\$586	\$607
Wellness Economy as a % of Regional GDP	5.54%	5.32%	5.34%	6.27%	5.54%	5.60%
Wellness Economy as a % of Global Total	6.10%	5.30%	5.27%	5.80%	6.16%	5.95%

* 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.

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

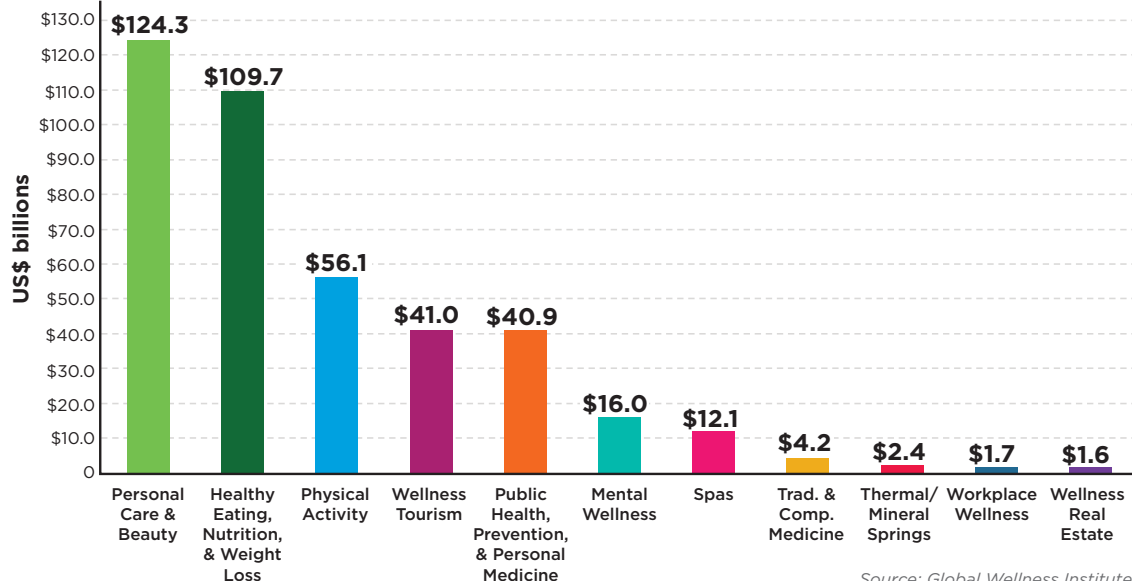
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 46 markets in Latin America-Caribbean); IMF World Economic Outlook, April 2025 Edition (GDP data); World Bank World Development Indicators (population data).

Latin America-Caribbean: Top 10 Wellness Markets, 2024

	US\$ billions
Brazil	\$125.40
Mexico	\$98.14
Argentina	\$38.80
Colombia	\$20.64
Peru	\$18.88
Chile	\$17.27
Panama	\$8.81
Costa Rica	\$8.72
Guatemala	\$8.38
Ecuador	\$8.14

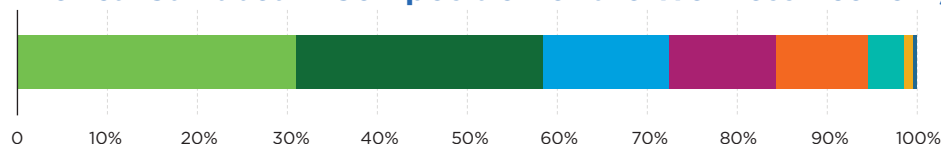
Source: GWI

Latin America-Caribbean: Wellness Economy Sectors, 2024



Source: Global Wellness Institute

Latin America-Caribbean: Composition of the Wellness Economy, 2024



Source: Global Wellness Institute

FIGURE 2.9 MIDDLE EAST-NORTH AFRICA: WELLNESS ECONOMY PROFILE, 2019-2024

Middle East-North Africa: Wellness Economy, 2019-2024

	2019*	2020*	2021*	2022*	2023*	2024
Wellness Economy (US\$ billions)	\$134.2	\$131.9	\$146.0	\$164.2	\$175.3	\$190.1
Wellness Economy Per Capita (US\$)	\$263	\$254	\$277	\$306	\$320	\$339
Wellness Economy as a % of Regional GDP	3.82%	4.20%	3.92%	4.41%	4.08%	4.28%
Wellness Economy as a % of Global Total	2.69%	2.83%	2.66%	2.80%	2.80%	2.81%

* 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.

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

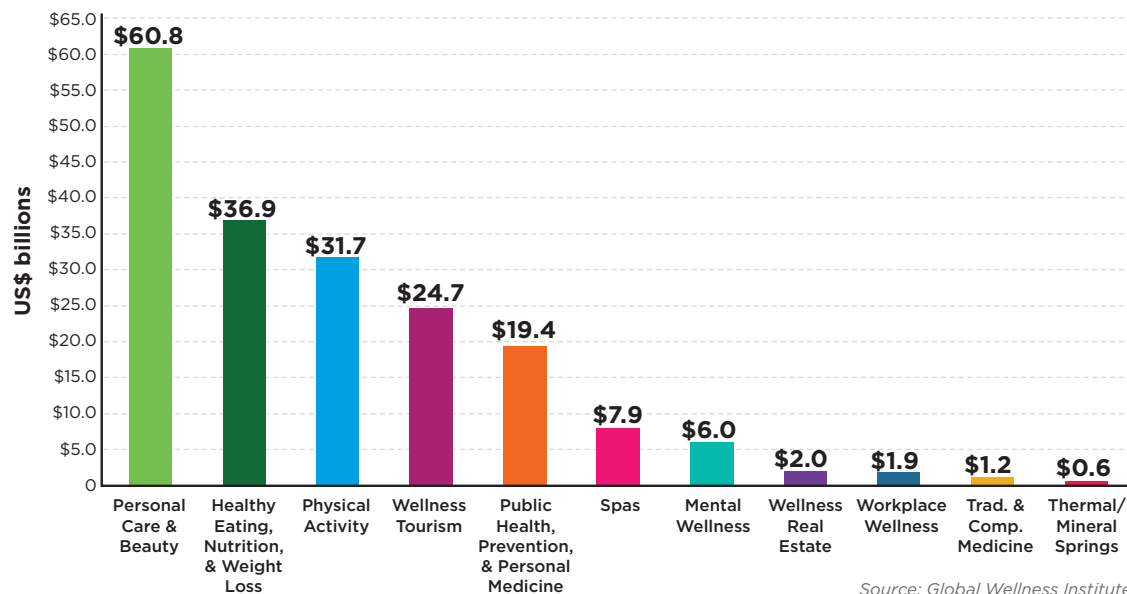
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 20 markets in Middle East-North Africa); IMF World Economic Outlook, April 2025 Edition (GDP data); World Bank World Development Indicators (population data).

Middle East-North Africa: Top 10 Wellness Markets, 2024

	US\$ billions
Saudi Arabia	\$41.56
United Arab Emirates	\$40.80
Israel	\$18.21
Egypt	\$14.69
Iran	\$13.22
Morocco	\$10.22
Algeria	\$9.19
Kuwait	\$7.41
Qatar	\$4.67
Jordan	\$4.20

Source: GWI

Middle East-North Africa: Wellness Economy Sectors, 2024



Middle East-North Africa: Composition of the Wellness Economy, 2024

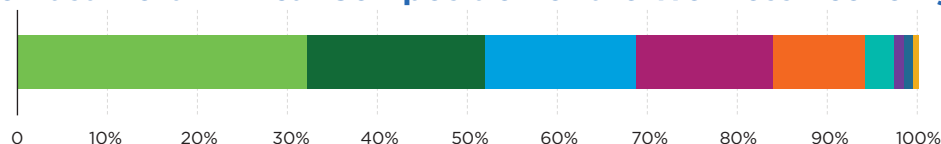


FIGURE 2.10 NORTH AMERICA: WELLNESS ECONOMY PROFILE, 2019-2024

North America: Wellness Economy, 2019-2024

	2019*	2020*	2021*	2022*	2023*	2024
Wellness Economy (US\$ billions)	\$1,570.0	\$1,528.2	\$1,814.3	\$2,042.9	\$2,158.2	\$2,299.6
Wellness Economy Per Capita (US\$)	\$4,268	\$4,135	\$4,899	\$5,478	\$5,726	\$6,029
Wellness Economy as a % of Regional GDP	6.74%	6.64%	7.06%	7.95%	7.22%	7.32%
Wellness Economy as a % of Global Total	31.43%	32.73%	33.08%	34.80%	34.43%	34.00%

* 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.

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

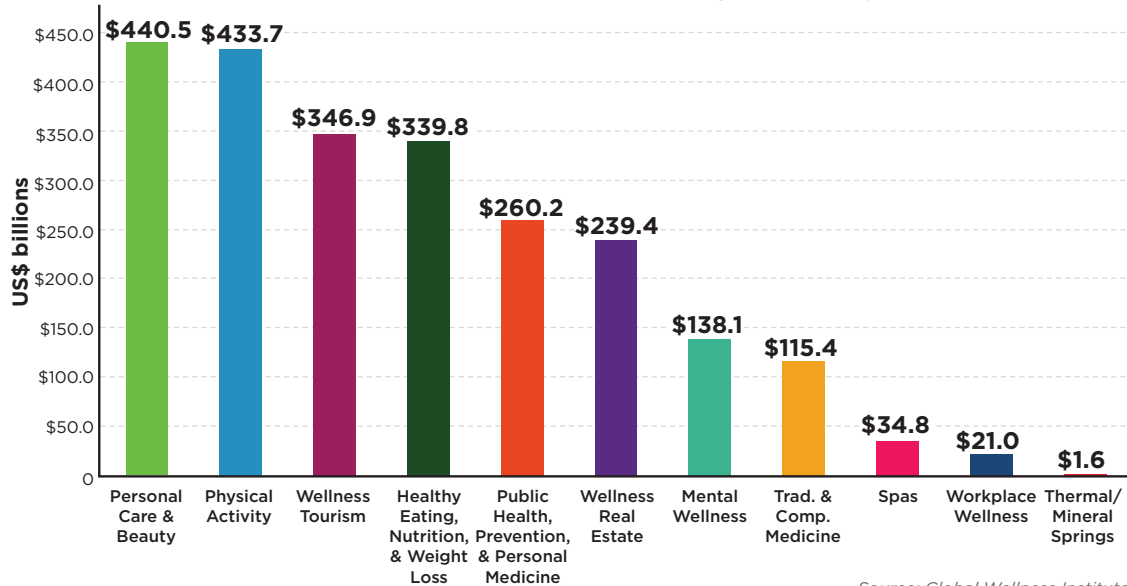
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 2 markets in North America); IMF World Economic Outlook, April 2025 Edition (GDP data); World Bank World Development Indicators (population data).

North America: Wellness Markets, 2024

	US\$ billions
United States	\$2,140.39
Canada	\$159.16

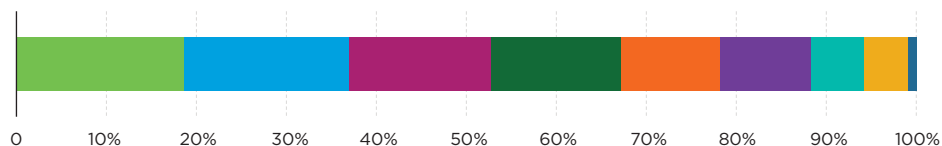
Source: GWI

North America: Wellness Economy Sectors, 2024



Source: Global Wellness Institute

North America: Composition of the Wellness Economy, 2024



Source: Global Wellness Institute

FIGURE 2.11 SUB-SAHARAN AFRICA: WELLNESS ECONOMY PROFILE, 2019-2024

Sub-Saharan Africa: Wellness Economy, 2019-2024

	2019*	2020*	2021*	2022*	2023*	2024
Wellness Economy (US\$ billions)	\$77.5	\$72.1	\$78.7	\$88.4	\$91.9	\$94.0
Wellness Economy Per Capita (US\$)	\$68	\$62	\$66	\$72	\$73	\$73
Wellness Economy as a % of Regional GDP	4.12%	4.08%	3.97%	4.46%	4.52%	4.90%
Wellness Economy as a % of Global Total	1.55%	1.54%	1.44%	1.51%	1.47%	1.39%

* 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.

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

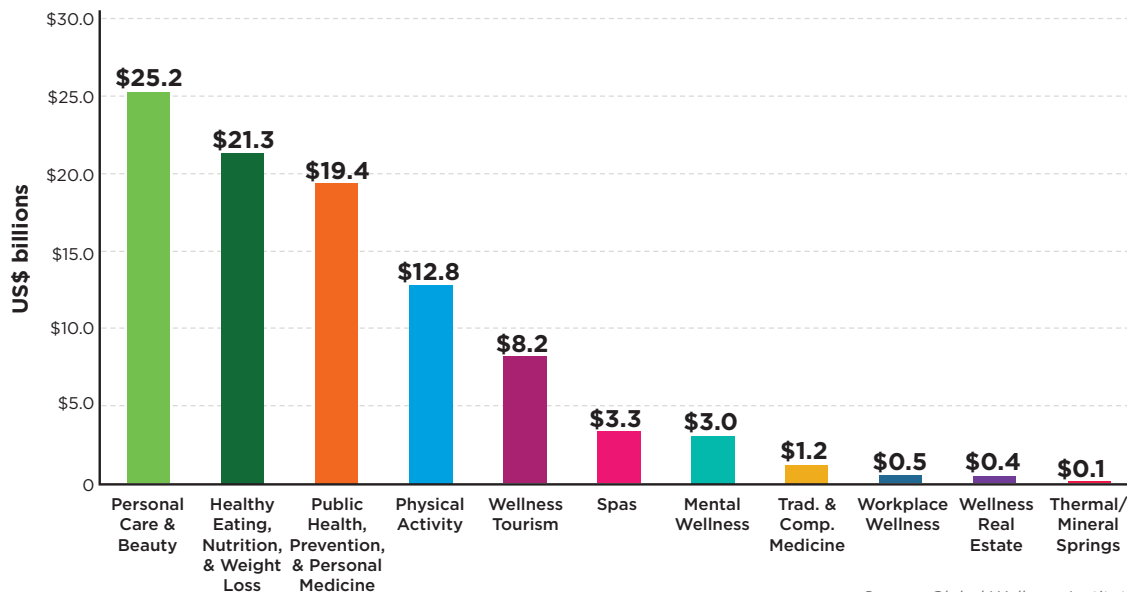
Source: Global Wellness Institute (based on extensive primary research and secondary data sources for 50 markets in Sub-Saharan Africa); IMF World Economic Outlook, April 2025 Edition (GDP data); World Bank World Development Indicators (population data)..

Sub-Saharan Africa: Top 10 Wellness Markets, 2024

	US\$ billions
South Africa	\$25.38
Nigeria	\$8.78
Kenya	\$8.38
Tanzania	\$3.42
Ghana	\$3.14
Angola	\$2.94
Cote d'Ivoire	\$2.69
Zambia	\$1.35
Senegal	\$1.31
Mauritius	\$1.20

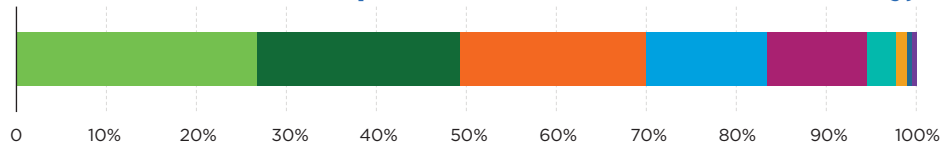
Source: GWI

Sub-Saharan Africa: Wellness Economy Sectors, 2024



Source: Global Wellness Institute

Sub-Saharan Africa: Composition of the Wellness Economy, 2024



Source: Global Wellness Institute

Wellness Economy Country Rankings

Key Findings

- The five largest wellness markets in 2024 are: the **United States** (\$2.1 trillion), **China** (\$950 billion), **Germany** (\$281 billion), **Japan** (\$262 billion), and the **United Kingdom** (\$261 billion). The list of countries ranking in the top five has not changed since 2019.
- The global wellness economy is very concentrated in North America, Asia-Pacific, and Europe. The top five largest wellness markets represent nearly 58% of the global wellness economy, while the top 25 represent 86%. The **United States** alone accounted for nearly 32% of the entire global wellness economy in 2024.
- The top 25 list has changed very little from 2019-2024, but a few countries have made notable increases in their rankings (**Saudi Arabia**, **UAE**, **India**, **Australia**, **Poland**, and the **Netherlands**).
- Among the top 25 markets, only three did not experience a pandemic-related decline in 2020 (**Saudi Arabia**, the **Netherlands**, and **Taiwan**). Since 2020, nearly all of the 25 largest wellness markets have resumed a robust growth trajectory. When we compare the size of the national wellness economies in 2024 versus 2019, all but one of the top 25 markets (**Japan**) have surpassed their pre-pandemic size when their markets are measured in U.S. dollar terms, and all of the top 25 markets have fully recovered when measured in their local currencies.
- Among the top 25 markets, nine stand out for their especially strong growth trends (exceeding the global average of 6.2% annual growth 2019-2024): **Saudi Arabia** and **India** (>11% annual growth); **Mexico** and **Poland** (>9% annual growth); and the **United Kingdom**, the **Netherlands**, **Canada**, the **United States**, and **Australia** (7.5%-8.5% annual growth).
- Among all countries, the ten countries with the strongest five-year annual growth rates (2019-2024) are: the **United Arab Emirates** (14.3%); **Saudi Arabia** (12.2%); **India**, **Croatia**, and **Cuba** (10.5%-11.5%); and **Romania**, **Mexico**, **Costa Rica**, **Kazakhstan**, and **Poland** (9%-10%).
- Currency depreciation has affected the measurements of several major wellness economies in Asia (**Japan**, **India**, **South Korea**, **Thailand**, **Indonesia**, and the **Philippines**), as well as **Brazil** and many **European countries**. In these countries, the performance of the wellness economy is stronger when measured in their local currencies.
- Four wellness sectors are responsible for much of the wellness economy growth in the largest and fastest-growing markets: *wellness real estate*; *wellness tourism*; *personal care & beauty*; and *healthy eating, nutrition, & weight loss*.
- Per capita spending on wellness is highest in wealthy countries (**Iceland**, **Switzerland**, the **United States**, **Austria**, and **Australia**) and in countries that are highly dependent on tourism (**Aruba** and the **Seychelles**, plus **Iceland**). All of these countries had per capita wellness spending higher than \$5,000 in 2024, as compared to \$831 globally.

TOP 25 LARGEST WELLNESS MARKETS IN 2024

The wellness economy is very concentrated, with the top 25 largest wellness markets representing 86% of the global total.

North America, Asia-Pacific, and Europe together account for nearly 90% of the global wellness economy, and all but two (**Brazil, Mexico**) of the 25 largest wellness markets are located in those regions (see *Figure 3.1*). The **United States** is by far the largest market, at \$2.1 trillion in 2024—about 2.3 times larger than the size of the second-largest market (**China**, at \$950 billion). In fact, the **United States** alone accounts for nearly 32% of the entire global wellness economy in 2024. The top 25 markets represent 86% of the global total, while just the top five account for nearly 58%.

The countries in the top 25 list tend to be very wealthy countries (e.g., Switzerland, the Netherlands, Australia) or very large countries by population size (e.g., India, China, Indonesia, Brazil), or they are both large and rich (e.g., the United States, Germany, United Kingdom).

The top 25 list has changed very little over the last five years, but a few countries have made notable increases in their rankings (**Saudi Arabia, the United Arab Emirates, India, Australia, Poland, and the Netherlands**).

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 (see *Figure 3.7* for the year-by-year changes in country rankings from 2019-2024). For example, the top five largest countries have not changed over the last five years (**United States, China, Germany, Japan, and the United Kingdom**). Looking at the period from 2019-2024, a few countries have made notable increases in their rankings, driven by especially strong wellness economy growth:

- In the Middle East, both **Saudi Arabia** and the **United Arab Emirates** have climbed significantly in the country rankings from 2019-2024. Saudi Arabia rose by four places (from #29 in 2019 to #25 in 2024), with its wellness economy growing by 12.2% annually during this time period. While ranking just outside the top 25 list, the United Arab Emirates rose by six places (from #32 to #26), with 14.3% annual growth from 2019-2024.
- In Asia-Pacific, both **India** and **Australia** have each climbed three places in the country rankings from 2019-2024 (India rose from #10 to #7, with 11.3% annual growth; Australia rose from #12 to #9, with 7.6% annual growth).
- In Europe, the **Netherlands** and **Poland** have climbed two and three places, respectively, in the rankings from 2019-2024 (the Netherlands rose from #19 to #17, with 8.2% annual growth; Poland rose from #24 to #21, with 9.3% annual growth).⁵

A few of the top 25 markets have fallen in the rankings from 2019-2024. Most of these shifts are due to the effects of currency depreciation against the U.S. dollar (see further discussion on *Page 24*), including

⁵ While Turkey appears to have a very high growth rate (see *Figure 3.1*) and has risen five spots in the rankings (see *Figure 3.7*), it has experienced a combination of hyperinflation and massive currency depreciation against the U.S. dollar since 2019. It is very challenging to interpret the real growth in its wellness economy versus the impacts of economic instability, since our wellness economy figures are measured in nominal U.S. dollars; therefore, Turkey's growth rates should be interpreted with caution.

Thailand and **Brazil** (dropped by four places), **Taiwan** and **Indonesia** (dropped by two places), and **Japan** and **South Korea** (dropped by one place). In Europe, both **Switzerland** and **Italy** also dropped by two places, due to slightly lower wellness economy growth rates as compared to other large markets.

Figure 3.1: Wellness Economy: Top 25 Markets in 2024

	Wellness Economy						Average Annual Growth Rate		
	(US\$ billions)						Rank in 2024	2023-2024	2019-2024
	2019*	2020*	2021*	2022*	2023*	2024			
United States	\$1,461.58	\$1,427.38	\$1,692.37	\$1,903.09	\$2,008.26	\$2,140.39	1	6.6%	7.9%
China	\$719.90	\$699.85	\$818.65	\$783.67	\$851.98	\$950.19	2	11.5%	5.7%
Germany	\$217.04	\$191.80	\$234.50	\$250.08	\$260.24	\$281.38	3	8.1%	5.3%
Japan	\$290.40	\$271.10	\$271.19	\$294.09	\$261.47	\$262.44	4	0.4%	-2.0%
United Kingdom	\$174.32	\$162.28	\$224.96	\$215.65	\$227.19	\$261.19	5	15.0%	8.4%
France	\$157.96	\$145.00	\$179.39	\$177.66	\$194.44	\$210.85	6	8.4%	5.9%
India	\$105.62	\$99.59	\$114.59	\$132.07	\$153.71	\$180.14	7	17.2%	11.3%
Canada	\$108.38	\$100.86	\$121.93	\$139.76	\$149.90	\$159.16	8	6.2%	8.0%
Australia	\$97.66	\$92.40	\$113.56	\$116.58	\$127.17	\$141.03	9	10.9%	7.6%
Italy	\$110.86	\$98.70	\$119.01	\$118.11	\$134.10	\$140.64	10	4.9%	4.9%
Brazil	\$113.58	\$89.85	\$98.33	\$111.51	\$122.25	\$125.40	11	2.6%	2.0%
South Korea	\$104.94	\$96.12	\$112.75	\$116.15	\$116.65	\$119.26	12	2.2%	2.6%
Russia	\$88.09	\$79.83	\$92.76	\$110.52	\$104.08	\$110.25	13	5.9%	4.6%
Spain	\$79.08	\$68.57	\$81.41	\$87.46	\$97.62	\$106.17	14	8.8%	6.1%
Mexico	\$61.60	\$49.49	\$63.87	\$76.93	\$93.37	\$98.14	15	5.1%	9.8%
Turkey**	\$41.54	\$36.23	\$43.68	\$50.08	\$61.49	\$72.69	16	18.2%	11.8%
Netherlands	\$41.89	\$43.50	\$53.45	\$50.97	\$57.08	\$62.23	17	9.0%	8.2%
Switzerland	\$45.58	\$39.34	\$44.90	\$49.91	\$53.46	\$57.59	18	7.7%	4.8%
Taiwan	\$44.10	\$44.34	\$50.69	\$50.04	\$52.40	\$55.81	19	6.5%	4.8%
Indonesia	\$43.52	\$42.91	\$48.41	\$46.16	\$50.80	\$55.77	20	9.8%	5.1%
Poland	\$33.42	\$31.71	\$35.86	\$38.51	\$44.93	\$52.02	21	15.8%	9.3%
Austria	\$37.92	\$31.21	\$36.49	\$40.28	\$44.13	\$47.93	22	8.6%	4.8%
Philippines	\$36.02	\$35.05	\$38.54	\$39.21	\$44.05	\$47.27	23	7.3%	5.6%
Thailand	\$41.71	\$30.89	\$28.61	\$32.70	\$38.79	\$42.71	24	10.1%	0.5%
Saudi Arabia	\$23.35	\$27.82	\$31.06	\$34.97	\$38.39	\$41.56	25	8.3%	12.2%

* 2019-2023 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 2025*.

** Turkey has experienced a combination of hyperinflation and massive currency depreciation against the U.S. dollar since 2019, and so its growth rates largely reflect those economic trends rather than real growth of its wellness economy.

Ranks are out of 145 countries. See Figure 3.7 for detailed time series data and rankings for all 145 countries.

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

GROWTH TRENDS FOR THE TOP 25 WELLNESS MARKETS (2019-2024)

Among the top 25 markets, only three did not experience a pandemic-related decline in 2020 (Saudi Arabia, the Netherlands, Taiwan).

The pandemic was a major shock to the overall wellness economy in 2020, and the same is true in most of the top 25 markets. Nearly all of the 25 largest markets saw a decline in wellness spending in 2019-2020 (see *Figure 3.1*), with three exceptions. **Saudi Arabia's** wellness economy increased by 19.2% in 2020 (the highest growth rate in the world that year), while the **Netherlands** grew by 3.8%. In both countries, the growth was primarily due to a massive increase in spending on *public health & prevention* in response to the pandemic. **Taiwan** grew modestly by 0.5% in 2020 because the initial COVID-19 outbreak was less severe, and several large sectors continued to grow (including ones that shrank in other places, such as *physical activity* and *personal care & beauty*)—offsetting a large decline in wellness tourism that year.

Nearly all 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 2024 versus 2019, all but one of the top 25 markets (**Japan**) have surpassed their pre-pandemic size when their markets are measured in U.S. dollar terms (see *Figure 3.1*), and all of the top 25 markets have fully recovered when measured in their local currencies (see further discussion of currency impacts on *Page 24*).

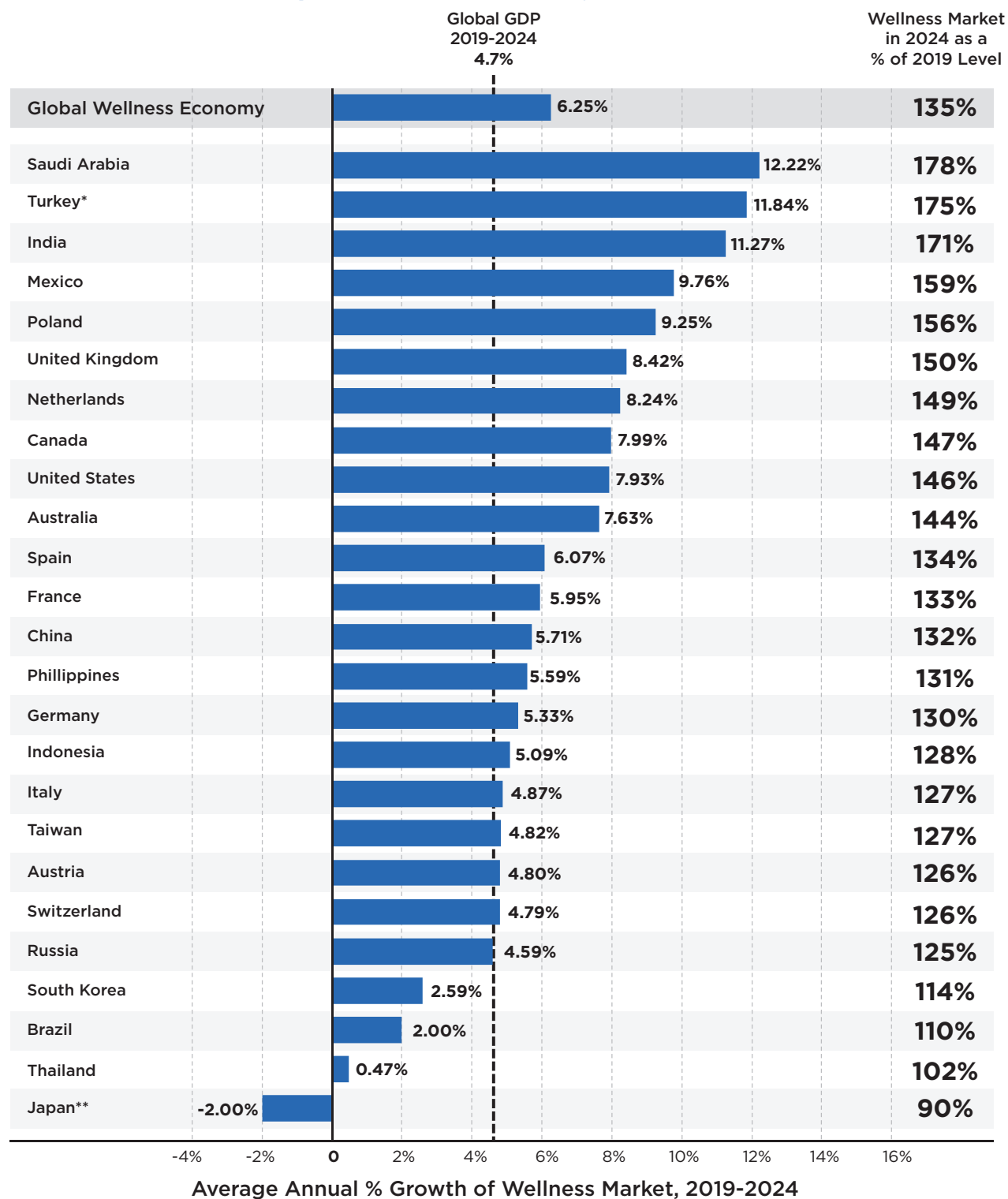
Top 25 wellness markets with especially strong five-year growth trends include Saudi Arabia, India, Mexico, Poland, the United Kingdom, the Netherlands, Canada, the United States, and Australia.

Among the top 25 markets, a few stand out for their especially strong growth trends over the last five years. As shown in *Figure 3.2*, nine countries* have exceeded the global average for wellness economy growth (6.2% annually from 2019-2024) and the global post-pandemic recovery rate (135%).

- **Saudi Arabia** and **India** have the strongest growth trends among the top 25 markets. Both countries have post-pandemic recovery rates of over 170%, and both countries' wellness economies have been growing by more than 11% annually over the last five years.
- **Mexico** and **Poland** both have wellness economies growing by over 9% annually from 2019-2024, and both exceed their pre-pandemic levels by over 155%.
- Five other countries (all in North America and Europe) have also posted above-average growth rates (from 7.5%-8.5% annually) and recovery rates (>140%): the **United Kingdom**, the **Netherlands**, **Canada**, the **United States**, and **Australia**.

* Note while **Turkey** appears to have a very high growth rate in *Figure 3.2*, it has experienced hyperinflation and massive currency depreciation against the U.S. dollar since 2019. It is very challenging to interpret the real growth in its wellness economy versus the impacts of its economic instability, since our wellness economy figures are measured in nominal U.S. dollars; therefore, Turkey's growth trends should be interpreted with caution.

**Figure 3.2: Average Annual Growth and Post-Pandemic Recovery Rates:
Top 25 Wellness Markets, 2019-2024**



Note: This chart presents the top 25 countries with the largest wellness markets as of 2024. Countries are ranked in the chart by their average annual growth rates from 2019-2024.

* Turkey has experienced hyperinflation since 2019, so its growth rate does not necessarily reflect real growth in its wellness economy and should be interpreted with caution.

** Japan's negative growth rate and lack of full recovery is due to depreciation of the yen against the U.S. dollar; its wellness economy has grown strongly when measured in yen. Many other markets (Thailand, Brazil, South Korea, Russia, etc.) also have dampened growth rates in U.S. dollars due to currency depreciation, especially across Asia and Europe.

Source: Global Wellness Institute and IMF (GDP data).

Currency depreciation has affected the measurements of several major wellness economies, especially in Japan, Russia, Brazil, India, South Korea, Thailand, Indonesia, and the Philippines, as well many European countries.

GWII's wellness economy figures are expressed in U.S. dollars, and currency fluctuations can affect these measurements. The last several years have been a period of significant currency volatility, with many major currencies (the yen, the euro, the Brazilian real, etc.) depreciating against the U.S. dollar since 2019. The impacts of currency depreciation against the U.S. dollar are especially noticeable in **Japan**. Japan's wellness economy shrank by 2.0% annually from 2019-2024 when measured in U.S. dollars, but it grew by 4.6% annually (and fully recovered beyond its 2019 level) when measured in Japanese yen (see *Figure 3.3*).

In several other major markets, including **Russia, Brazil, India, South Korea, Thailand, Indonesia**, and the **Philippines**, their wellness economies have also been growing quite a bit faster in local currency terms than in U.S. dollars. Even across the **Euro Zone** countries, the 3.4% depreciation of the euro against the U.S. dollar from 2019-2024 has dampened the wellness economy growth rates in all of these countries when they are measured in dollars.

Even so, in a few markets—**Russia, Brazil, Taiwan**, and **Switzerland**—their wellness economies have shrunk when measured as a share of their national GDP (see *Figure 3.3* and *Figure 3.9*), meaning their wellness economy growth has lagged behind overall economic growth from 2019-2024, regardless of whether it is measured in U.S. dollars or in the local currency.

In **Mexico** and **Switzerland**, currency appreciation against the U.S. dollar has had the opposite effect: Their wellness economies have been growing slower when measured in the local currency as compared to in U.S. dollars.

Figure 3.3: Currency Impacts among the Largest Wellness Markets, 2019-2024

	Currency Rates	Wellness Economy					
	Local Currency % Change Against US\$	Average Annual Growth Rate		Post-Pandemic Recovery Rate		Wellness Economy as a % of GDP (in Local Currency)	
	2019-2024	2019-2024		2023 as a % of 2014		2019	2024
		In Local Currency	In U.S. Dollars	In Local Currency	In U.S. Dollars		
Due to currency depreciation, these wellness economies have fully recovered when measured in their local currencies but not when measured in U.S. dollars.							
Japan	38.9%	4.64%	-2.00%	125%	90%	5.7%	6.5%
Due to currency depreciation, these wellness economies are growing faster when measured in their local currencies than when measured in U.S. dollars.							
Russia	43.4%	12.41%	4.59%	179%	125%	5.2%	5.1%
Brazil	36.6%	8.57%	2.00%	151%	110%	6.1%	5.8%
India	18.8%	15.17%	11.27%	203%	171%	3.7%	4.6%
South Korea	17.0%	5.86%	2.59%	133%	114%	6.0%	6.4%
Thailand	13.7%	3.08%	0.47%	116%	102%	7.7%	8.1%
Indonesia	12.1%	7.51%	5.09%	144%	128%	3.9%	4.0%
Philippines	10.6%	7.74%	5.59%	145%	131%	9.6%	10.2%
Australia	5.3%	8.75%	7.63%	152%	144%	7.0%	7.8%
China	4.2%	6.58%	5.71%	138%	132%	4.9%	5.1%
Taiwan	3.8%	5.61%	4.82%	131%	127%	7.2%	7.1%
Poland	3.7%	10.05%	9.25%	161%	156%	5.5%	5.7%
Netherlands	3.4%	8.97%	8.24%	154%	149%	4.5%	5.1%
Spain	3.4%	6.79%	6.07%	139%	134%	5.6%	6.2%
France	3.4%	6.66%	5.95%	138%	133%	5.8%	6.7%
Germany	3.4%	6.04%	5.33%	134%	130%	5.5%	6.0%
Italy	3.4%	5.58%	4.87%	131%	127%	5.5%	5.9%
Austria	3.4%	5.51%	4.80%	131%	126%	8.6%	9.2%
Canada	3.2%	8.67%	7.99%	152%	147%	6.2%	7.1%
Due to currency appreciation, these wellness economies are growing slower when measured in their local currencies than when measured in U.S. dollars.							
Mexico	-5.0%	8.65%	9.76%	151%	159%	4.7%	5.3%
Switzerland	-11.4%	2.28%	4.79%	112%	126%	6.3%	6.1%

Source: Global Wellness Institute and IMF (currency rates).

GROWTH TRENDS ACROSS ALL WELLNESS MARKETS (2019-2024)

Next, we move beyond the 25 largest wellness markets and look at the five-year growth trends across all countries with wellness economies larger than \$5.0 billion in 2024.⁶ *Figure 3.4* illustrates the countries that have posted the strongest and weakest growth of their wellness economies from 2019-2024.

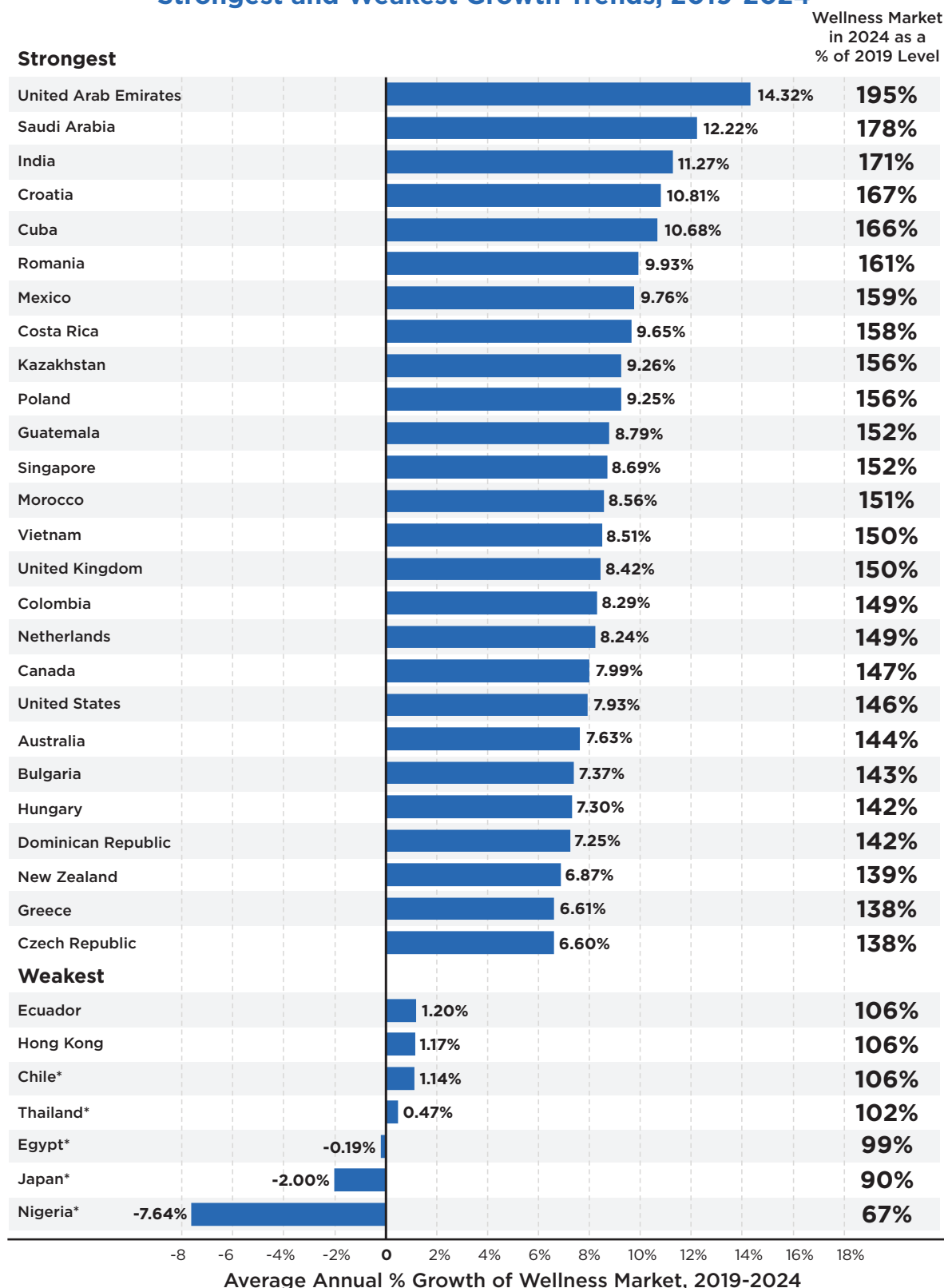
The ten countries with the strongest five-year growth trends (2019-2024) include: the United Arab Emirates, Saudi Arabia, India, Croatia, Cuba, Romania, Mexico, Costa Rica, Kazakhstan, and Poland.

In *Figure 3.4*, we list 26 countries that have exceeded the global average for both wellness economy growth (6.2% annually from 2019-2024) and the global post-pandemic recovery rate (135%). Ten countries stand out for their especially strong growth trends, which far exceed the global average:

- The **United Arab Emirates** and **Saudi Arabia** have the strongest wellness economy growth trends across all countries.
 - In the United Arab Emirates, the wellness economy has grown by 14.3% annually from 2019-2024 (more than double the global average), with the growth led by a massive increase in *wellness tourism* and *personal care & beauty* spending.
 - Saudi Arabia has grown by 12.2% annually, with its growth led by a large increase in *public health* spending, along with *personal care & beauty* spending.
- **India, Croatia, and Cuba** all have wellness economies growing at 10.5%-11.5% annually from 2019-2024.
 - In India, the strong growth was driven by massive increases in *traditional & complementary medicine and wellness tourism* spending, followed by *personal care & beauty*.
 - Croatia's strong growth was led by the *wellness tourism* and *personal care & beauty* sectors.
 - Cuba's growth was entirely driven by spending growth in the *personal care & beauty* sector.
- Five countries have wellness economy growth rates of 9%-10% annually from 2019-2024: **Romania, Mexico, Costa Rica, Kazakhstan, and Poland**.
 - For both Romania and Poland, growth has primarily been led by spending increases in the *personal care & beauty* and *healthy eating* sectors, followed by *physical activity* and *wellness tourism*.
 - Kazakhstan's strong growth was entirely driven by the *personal care & beauty* sector.
 - Mexico's growth was primarily driven by the *healthy eating* and *physical activity* sectors, followed by *wellness tourism* and *personal care & beauty*.
 - In Costa Rica, the growth was led by three sectors: *healthy eating*, *personal care & beauty*, and *wellness tourism*.

⁶ This analysis comprises 70 countries with wellness economies that exceed \$5.0 billion in 2024. It excludes countries with major conflicts or humanitarian crises.

Figure 3.4: Selected Markets with the Strongest and Weakest Growth Trends, 2019-2024



Note: Countries presented in this chart are drawn from those with a wellness market size greater than \$5.0 billion in 2024 (the top 70 largest countries). Countries are ranked in the chart by their post-pandemic recovery (wellness market in 2024 as a % of 2019 level). Turkey and Argentina are not included in this chart, because their hyperinflation and currency depreciation make it difficult to interpret their wellness economy growth trends when measured in U.S. dollars.

The countries with the weakest five-year growth trends (2019-2024) in both U.S. dollars and local currency are Ecuador and Hong Kong.

Figure 3.4 also lists seven countries that have posted the weakest wellness economy growth trends over the last five years (<2% annual growth), when measured in U.S. dollars. This list can be deceptive because the country growth rates are affected by currency depreciation against the U.S. dollar (as discussed on Page 24). The seemingly “slow” growth for five of these countries (**Chile, Thailand, Egypt, Japan, and Nigeria**) is entirely due to currency fluctuations. When these countries are measured in their local currencies, they have all grown more rapidly from 2019-2024 (i.e., the local currency annualized five-year growth rates are 26.5% in Nigeria, 21.8% in Egypt, 7.3% in Chile, 4.6% in Japan, and 3.1% in Thailand).

Wellness economy growth trends have been weak in both U.S. dollars and local currency for two countries (**Hong Kong** and **Ecuador**):

- In Hong Kong, spending growth has been relatively slow (below the global average) across all sectors except for *physical activity*, and spending even declined from 2019-2024 for several sectors (*personal care & beauty, traditional & complementary medicine, workplace wellness, and healthy eating/nutrition/weight loss*).
- Ecuador saw below-average growth for all sectors except *spas, thermal/mineral springs, and workplace wellness*, as well as a decline in *wellness tourism* spending from 2019-2024.

Four wellness sectors are responsible for much of the wellness economy growth in the largest and fastest-growing markets.

The strongest-growing markets shown in *Figure 3.4* include a mix of high-, upper middle-, and lower middle-income countries. Looking at the detailed growth trends across these countries, what stands out is that four sectors are primarily responsible for the wellness economy growth from 2019-2024⁷ across all of these markets, in varying ways:

- **Wellness real estate** has been the leading contributor to wellness economy growth globally, as well as among many high-growth countries that also fall into the top 25 largest markets (the **United States**, **Canada**, the **United Kingdom**, the **Netherlands**, and **Australia**). It is not a major factor in the smaller high-growth wellness markets, except in **Singapore** and **New Zealand**.
- **Wellness tourism** has been the third largest contributor to wellness economy growth globally. It has also accounted for the majority of the wellness economy growth in several high-growth countries, including the **United Arab Emirates**, **Morocco**, the **Dominican Republic**, **Croatia**, **Greece**, the **Czech Republic**, and **Hungary**.
- Growing expenditures on **personal care & beauty** and **healthy eating, nutrition, & weight loss** are also a major contributor to the growth of the global wellness economy. These two sectors have been a big factor in the growth of nearly all of the countries shown in *Figure 3.4*, and especially in many middle- and higher-income countries: **Vietnam**, **Poland**, **Kazakhstan**, **Romania**, **Bulgaria**, **Mexico**, **Guatemala**, **Costa Rica**, and **Cuba**. In most of these countries (other than Vietnam), these two sectors accounted for one-half to more than three-quarters of all wellness economy growth from 2019-2024. Over the last few years, inflation has raised the prices of many consumer products, especially in the *personal care & beauty* and *healthy eating* sectors. Since many middle-income and small-/mid-sized countries import a lot of their consumer goods, price increases likely contributed to much of the increased spending and high growth in these sectors.

In addition to the four sectors mentioned above, the *physical activity* sector was the largest contributor to growth in two countries (**New Zealand** and **Colombia**). In **India**, nearly one-third of the growth was driven by the *traditional & complementary medicine* sector. In **Saudi Arabia**, the leading growth sector was *public health, prevention, & personalized medicine* (contributing one-third of the country's overall growth).

⁷ Note that this analysis does not mean these four sectors had the highest percentage growth rates, but rather than they contributed the largest shares of the overall numerical increase in the wellness economy size across this set of countries from 2019-2024. Therefore, larger wellness economy sectors tend to be overrepresented in this analysis.

PER CAPITA SPENDING ON WELLNESS BY COUNTRY

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

When measured on a per capita basis, wellness economy spending is highest in **Iceland, Switzerland, Aruba, the United States, the Seychelles, Austria, and Australia** (see *Figure 3.5*). All of these countries had per capita wellness spending higher than \$5,000 in 2024. By comparison, per capita wellness spending was only \$831 globally in 2024.

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 **Iceland, Switzerland, the United States, Austria, Australia, Norway**, etc. (see *Figure 3.5*) 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 included in this list are several highly tourism-dependent countries: **Aruba, the Seychelles, the Bahamas, and the Maldives**. These island economies are popular destinations for high-end tourism, and overall tourism represents a very large share of their GDPs (ranging from 38%-82% of GDP, see *Figure 3.5*). In these four countries, a large portion (48%-70%) 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 3.5: Wellness Economy Per Capita, GDP Per Capita, and Tourism:
Top 25 Markets in 2024**

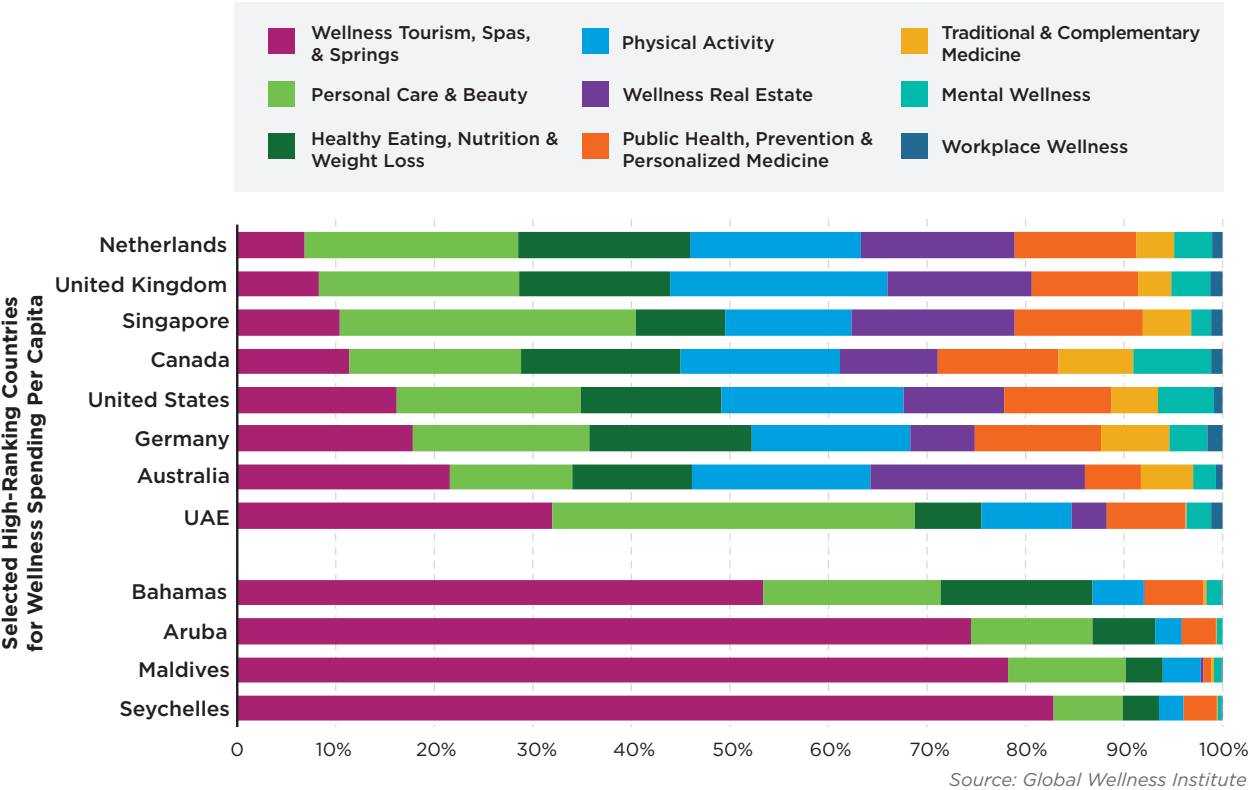
	Wellness Economy Per Capita		GDP Per Capita		Overall Tourism as a % of GDP	
	US\$	Rank	Current US\$	Rank	% of GDP	Rank
Iceland	\$7,393	1	\$87,205	5	14.21%	24
Switzerland	\$6,375	2	\$104,523	3	3.15%	99
Aruba	\$6,363	3	\$36,386	30	81.60%	1
United States	\$6,293	4	\$85,812	7	4.14%	76
Seychelles	\$5,936	5	\$21,532	56	45.59%	3
Austria	\$5,222	6	\$56,915	14	7.20%	49
Australia	\$5,184	7	\$66,248	12	7.13%	50
Norway	\$4,799	8	\$86,611	6	4.88%	66
New Zealand	\$4,630	9	\$48,310	23	9.02%	39
Denmark	\$4,028	10	\$72,042	9	4.71%	70
Canada	\$3,855	11	\$54,473	17	3.27%	95
Singapore	\$3,845	12	\$90,674	4	3.30%	93
United Kingdom	\$3,773	13	\$52,648	21	2.31%	116
Ireland	\$3,762	14	\$106,456	2	2.37%	113
United Arab Emirates	\$3,751	15	\$48,830	22	16.39%	18
Finland	\$3,725	16	\$53,326	20	3.97%	80
Hong Kong	\$3,695	17	\$54,034	19	3.84%	83
Bahamas	\$3,686	18	\$36,167	31	37.66%	5
Luxembourg	\$3,588	19	\$138,634	1	4.64%	71
U.S. Virgin Islands	\$3,473	20	\$44,321	25	25.63%	8
Netherlands	\$3,458	21	\$68,393	11	3.68%	86
Germany	\$3,369	22	\$54,990	16	2.95%	103
Maldives	\$3,269	23	\$17,372	64	80.98%	2
Sweden	\$3,236	24	\$57,625	13	5.35%	62
France	\$3,077	25	\$46,204	24	7.64%	46
Global Average	\$831		\$13,673		4.56%	

Ranks are out of 145 countries. See Figure 3.8 for detailed time series data on wellness economy per capita and GDP per capita in all 145 countries. See Figure 3.9 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 2025 Edition (GDP data); Euromonitor (tourism data).

Figure 3.6 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 (the **Netherlands**, the **United Kingdom**, **Singapore**, **Canada**, etc.), we see wellness economies that are well-diversified across the eleven sectors. In the tourism-dependent countries (the **Bahamas**, **Aruba**, the **Maldives**, the **Seychelles**) we can easily see that their wellness economies are heavily dominated by spending on *wellness tourism* and *spas*.

Figure 3.6: Composition of the Wellness Economy for Selected Countries, 2024



Detailed Country Data Tables

RANKING 145 COUNTRIES

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Figure 3.7: Wellness Economy Size and Rankings Time Series, 2019-2024

Wellness Economy Size and Rankings Time Series												
	2019*		2020*		2021*		2022*		2023*		2024	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
United States	\$1,461.58	1	\$1,427.38	1	\$1,692.37	1	\$1,903.09	1	\$2,008.26	1	\$2,140.39	1
China	\$719.90	2	\$699.85	2	\$818.65	2	\$783.67	2	\$851.98	2	\$950.19	2
Germany	\$217.04	4	\$191.80	4	\$234.50	4	\$250.08	4	\$260.24	4	\$281.38	3
Japan	\$290.40	3	\$271.10	3	\$271.19	3	\$294.09	3	\$261.47	3	\$262.44	4
United Kingdom	\$174.32	5	\$162.28	5	\$224.96	5	\$215.65	5	\$227.19	5	\$261.19	5
France	\$157.96	6	\$145.00	6	\$179.39	6	\$177.66	6	\$194.44	6	\$210.85	6
India	\$105.62	10	\$99.59	8	\$114.59	9	\$132.07	8	\$153.71	7	\$180.14	7
Canada	\$108.38	9	\$100.86	7	\$121.93	7	\$139.76	7	\$149.90	8	\$159.16	8
Australia	\$97.66	12	\$92.40	11	\$113.56	10	\$116.58	10	\$127.17	10	\$141.03	9
Italy	\$110.86	8	\$98.70	9	\$119.01	8	\$118.11	9	\$134.10	9	\$140.64	10
Brazil	\$113.58	7	\$89.85	12	\$98.33	12	\$111.51	12	\$122.25	11	\$125.40	11
South Korea	\$104.94	11	\$96.12	10	\$112.75	11	\$116.15	11	\$116.65	12	\$119.26	12
Russia	\$88.09	13	\$79.83	13	\$92.76	13	\$110.52	13	\$104.08	13	\$110.25	13
Spain	\$79.08	14	\$68.57	14	\$81.41	14	\$87.46	14	\$97.62	14	\$106.17	14
Mexico	\$61.60	15	\$49.49	15	\$63.87	15	\$76.93	15	\$93.37	15	\$98.14	15
Turkey	\$41.54	21	\$36.23	20	\$43.68	20	\$50.08	17	\$61.49	16	\$72.69	16
Netherlands	\$41.89	19	\$43.50	17	\$53.45	16	\$50.97	16	\$57.08	17	\$62.23	17
Switzerland	\$45.58	16	\$39.34	19	\$44.90	19	\$49.91	19	\$53.46	18	\$57.59	18
Taiwan	\$44.10	17	\$44.34	16	\$50.69	17	\$50.04	18	\$52.40	19	\$55.81	19
Indonesia	\$43.52	18	\$42.91	18	\$48.41	18	\$46.16	20	\$50.80	20	\$55.77	20
Poland	\$33.42	24	\$31.71	22	\$35.86	23	\$38.51	23	\$44.93	21	\$52.02	21
Austria	\$37.92	22	\$31.21	23	\$36.49	22	\$40.28	21	\$44.13	22	\$47.93	22
Philippines	\$36.02	23	\$35.05	21	\$38.54	21	\$39.21	22	\$44.05	23	\$47.27	23
Thailand	\$41.71	20	\$30.89	24	\$28.61	26	\$32.70	26	\$38.79	25	\$42.71	24
Saudi Arabia	\$23.35	29	\$27.82	25	\$31.06	25	\$34.97	25	\$38.39	26	\$41.56	25
United Arab Emirates	\$20.90	32	\$20.79	28	\$22.47	31	\$28.41	28	\$34.75	27	\$40.80	26
Argentina	\$23.52	28	\$19.69	30	\$24.13	27	\$36.10	24	\$39.79	24	\$38.80	27
Sweden	\$27.81	25	\$27.37	26	\$32.85	24	\$31.50	27	\$32.33	28	\$34.20	28
Malaysia	\$27.69	26	\$22.50	27	\$23.64	29	\$25.83	29	\$28.90	29	\$31.77	29
Hong Kong	\$26.23	27	\$19.08	32	\$22.32	32	\$23.28	31	\$27.45	30	\$27.80	30
Vietnam	\$18.14	34	\$17.54	35	\$18.36	37	\$21.15	34	\$23.89	32	\$27.29	31
Norway	\$21.48	30	\$19.97	29	\$24.02	28	\$24.61	30	\$24.86	31	\$26.74	32
South Africa	\$21.17	31	\$19.11	31	\$21.59	33	\$23.13	32	\$23.34	33	\$25.38	33
New Zealand	\$17.72	36	\$16.33	37	\$19.72	36	\$19.95	36	\$22.36	36	\$24.71	34
Belgium	\$19.40	33	\$18.15	34	\$21.20	34	\$20.98	35	\$23.09	34	\$24.39	35
Denmark	\$18.10	35	\$18.56	33	\$23.49	30	\$22.06	33	\$22.78	35	\$24.08	36
Singapore	\$15.30	40	\$13.01	42	\$15.51	42	\$18.54	38	\$21.44	37	\$23.21	37

Wellness Economy Size and Rankings Time Series												
	2019*		2020*		2021*		2022*		2023*		2024	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
Finland	\$17.66	37	\$16.79	36	\$19.83	35	\$19.17	37	\$20.21	38	\$21.00	38
Portugal	\$16.02	39	\$13.32	41	\$15.66	41	\$17.73	41	\$19.77	39	\$20.99	39
Colombia	\$13.86	46	\$12.39	45	\$14.00	45	\$15.41	46	\$17.48	44	\$20.64	40
Ireland	\$15.03	42	\$12.45	44	\$15.15	44	\$17.75	40	\$18.70	40	\$20.24	41
Czech Republic	\$13.94	45	\$12.06	46	\$15.25	43	\$16.45	43	\$18.09	41	\$19.20	42
Peru	\$15.20	41	\$12.45	43	\$13.34	47	\$15.47	45	\$17.23	45	\$18.88	43
Greece	\$13.40	47	\$10.83	48	\$13.45	46	\$15.21	47	\$17.11	46	\$18.45	44
Israel	\$14.67	44	\$13.33	40	\$16.38	40	\$18.08	39	\$17.73	43	\$18.21	45
Chile	\$16.32	38	\$13.64	39	\$16.50	39	\$16.16	44	\$17.94	42	\$17.27	46
Romania	\$10.32	50	\$9.78	50	\$11.87	48	\$12.67	49	\$14.56	48	\$16.57	47
Egypt	\$14.83	43	\$15.50	38	\$18.17	38	\$17.44	42	\$14.91	47	\$14.69	48
Hungary	\$9.89	51	\$8.09	51	\$10.24	51	\$10.32	51	\$12.90	49	\$14.06	49
Iran	\$10.80	49	\$10.24	49	\$10.89	50	\$12.47	50	\$11.96	50	\$13.22	50
Kazakhstan	\$7.29	55	\$6.79	55	\$7.69	54	\$8.75	52	\$10.15	52	\$11.35	51
Slovakia	\$8.07	52	\$6.27	57	\$7.10	58	\$8.16	55	\$9.51	53	\$10.81	52
Morocco	\$6.78	60	\$5.45	61	\$6.03	63	\$7.06	63	\$8.64	55	\$10.22	53
Croatia	\$5.62	62	\$4.50	63	\$6.29	62	\$7.11	62	\$8.47	57	\$9.39	54
Pakistan	\$7.28	56	\$6.84	54	\$8.09	52	\$8.22	54	\$8.11	59	\$9.32	55
Algeria	\$7.60	54	\$6.93	52	\$7.50	55	\$7.83	56	\$8.68	54	\$9.19	56
Bangladesh	\$6.87	59	\$6.92	53	\$7.87	53	\$8.48	53	\$8.47	56	\$9.07	57
Panama	\$7.05	58	\$5.49	60	\$6.53	60	\$7.67	58	\$8.32	58	\$8.81	58
Nigeria	\$13.06	48	\$11.31	47	\$11.58	49	\$13.43	48	\$11.70	51	\$8.78	59
Costa Rica	\$5.50	63	\$4.10	65	\$4.62	65	\$5.70	64	\$7.67	62	\$8.72	60
Kenya	\$7.08	57	\$6.42	56	\$7.36	56	\$7.74	57	\$7.64	63	\$8.38	61
Guatemala	\$5.50	64	\$5.31	62	\$6.32	61	\$7.34	60	\$7.89	61	\$8.38	62
Ecuador	\$7.67	53	\$6.22	59	\$7.24	57	\$7.65	59	\$8.00	60	\$8.14	63
Kuwait	\$6.35	61	\$6.25	58	\$6.89	59	\$7.16	61	\$7.11	64	\$7.41	64
Puerto Rico	\$4.64	66	\$4.19	64	\$4.89	64	\$5.41	65	\$5.84	65	\$6.12	65
Bulgaria	\$4.25	68	\$3.61	67	\$4.24	66	\$4.58	66	\$5.47	66	\$6.06	66
Sri Lanka	\$4.87	65	\$4.04	66	\$4.12	67	\$3.93	69	\$5.05	69	\$5.85	67
Uruguay	\$4.29	67	\$3.37	68	\$3.76	68	\$4.48	68	\$5.35	67	\$5.64	68
Dominican Republic	\$3.88	69	\$2.76	74	\$3.55	70	\$4.52	67	\$5.09	68	\$5.51	69
Cuba	\$3.11	75	\$2.91	72	\$3.02	74	\$3.68	72	\$4.92	70	\$5.17	70
Slovenia	\$3.56	70	\$2.82	73	\$3.49	71	\$3.82	71	\$4.33	71	\$4.68	71
Qatar	\$2.89	77	\$2.45	80	\$2.68	80	\$3.53	76	\$4.07	75	\$4.67	72
Lithuania	\$3.30	72	\$2.99	70	\$3.56	69	\$3.88	70	\$4.30	72	\$4.60	73
Serbia	\$3.31	71	\$2.95	71	\$3.25	72	\$3.65	73	\$4.19	73	\$4.56	74
Jordan	\$3.12	74	\$2.55	77	\$2.93	76	\$3.60	75	\$4.08	74	\$4.20	75

Wellness Economy Size and Rankings Time Series												
	2019*		2020*		2021*		2022*		2023*		2024	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
Oman	\$3.28	73	\$3.11	69	\$3.24	73	\$3.63	74	\$3.85	76	\$4.13	76
El Salvador	\$2.74	79	\$2.48	79	\$3.02	75	\$3.37	77	\$3.63	77	\$3.89	77
Tunisia	\$2.90	76	\$2.58	76	\$2.93	77	\$3.20	79	\$3.56	78	\$3.88	78
Tanzania	\$2.45	82	\$2.10	81	\$2.45	81	\$2.87	81	\$3.26	79	\$3.42	79
Belarus	\$2.82	78	\$2.48	78	\$2.75	79	\$2.99	80	\$3.13	80	\$3.25	80
Cambodia	\$2.59	80	\$1.68	88	\$1.58	96	\$2.15	90	\$2.82	84	\$3.24	81
Ghana	\$2.54	81	\$2.70	75	\$2.91	78	\$2.77	82	\$3.10	81	\$3.14	82
Uzbekistan	\$1.88	89	\$1.80	84	\$2.26	83	\$2.73	83	\$3.00	82	\$3.04	83
Iceland	\$2.03	87	\$1.40	95	\$1.89	89	\$2.30	86	\$2.67	86	\$2.99	84
Angola	\$2.12	83	\$1.77	86	\$2.06	88	\$3.27	78	\$2.95	83	\$2.94	85
Azerbaijan	\$2.00	88	\$1.83	83	\$2.17	84	\$2.56	84	\$2.81	85	\$2.92	86
Nepal	\$1.84	92	\$1.57	91	\$1.84	92	\$2.16	88	\$2.49	88	\$2.78	87
Cote d'Ivoire	\$1.76	94	\$1.95	82	\$2.33	82	\$2.31	85	\$2.53	87	\$2.69	88
Cyprus	\$2.11	84	\$1.40	96	\$1.88	90	\$2.11	92	\$2.47	89	\$2.67	89
Estonia	\$1.82	93	\$1.66	89	\$2.10	85	\$2.24	87	\$2.39	91	\$2.58	90
Latvia	\$1.88	90	\$1.70	87	\$2.09	87	\$2.16	89	\$2.41	90	\$2.56	91
Luxembourg	\$2.07	86	\$1.79	85	\$2.09	86	\$2.11	91	\$2.30	92	\$2.43	92
Honduras	\$1.56	97	\$1.41	94	\$1.85	91	\$2.10	93	\$2.26	93	\$2.39	93
Bahrain	\$1.88	91	\$1.43	93	\$1.67	94	\$1.96	94	\$2.21	94	\$2.33	94
Bolivia	\$1.75	95	\$1.64	90	\$1.78	93	\$1.91	95	\$2.06	95	\$2.20	95
Paraguay	\$1.68	96	\$1.48	92	\$1.63	95	\$1.91	96	\$2.00	96	\$2.14	96
Macau	\$2.07	85	\$1.32	97	\$1.57	97	\$1.54	97	\$1.91	98	\$2.07	97
Bosnia Herzegovina	\$1.49	98	\$1.26	98	\$1.48	98	\$1.48	99	\$1.92	97	\$2.04	98
Georgia	\$1.26	100	\$0.89	103	\$1.04	103	\$1.50	98	\$1.85	99	\$1.98	99
Albania	\$1.17	102	\$1.03	99	\$1.26	99	\$1.38	102	\$1.70	100	\$1.94	100
Jamaica	\$1.33	99	\$0.86	104	\$1.05	102	\$1.46	100	\$1.70	101	\$1.80	101
Trinidad & Tobago	\$1.20	101	\$1.02	100	\$1.15	101	\$1.45	101	\$1.61	102	\$1.73	102
Maldives	\$1.01	106	\$0.50	118	\$0.90	107	\$1.22	104	\$1.53	103	\$1.73	103
Turkmenistan	\$0.97	107	\$1.01	101	\$1.19	100	\$1.37	103	\$1.43	104	\$1.48	104
Bahamas	\$1.14	103	\$0.62	113	\$0.89	108	\$1.15	107	\$1.36	105	\$1.48	105
Malta	\$0.91	110	\$0.63	112	\$0.80	111	\$0.95	109	\$1.18	109	\$1.36	106
Nicaragua	\$0.92	109	\$0.86	105	\$1.03	105	\$1.19	105	\$1.29	107	\$1.36	107
Zambia	\$1.04	104	\$0.82	106	\$0.94	106	\$1.19	106	\$1.29	106	\$1.35	108
Senegal	\$1.01	105	\$0.98	102	\$1.03	104	\$1.08	108	\$1.22	108	\$1.31	109
Mauritius	\$0.95	108	\$0.60	114	\$0.61	115	\$0.84	114	\$0.97	112	\$1.20	110
North Macedonia	\$0.78	114	\$0.72	108	\$0.83	109	\$0.86	112	\$1.00	111	\$1.10	111
Botswana	\$0.86	111	\$0.67	109	\$0.81	110	\$0.91	110	\$0.95	113	\$1.02	112
Armenia	\$0.68	116	\$0.56	115	\$0.61	116	\$0.85	113	\$1.00	110	\$1.01	113

Wellness Economy Size and Rankings Time Series												
	2019*		2020*		2021*		2022*		2023*		2024	
	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank	US\$ billions	Rank
Moldova	\$0.69	115	\$0.65	111	\$0.74	113	\$0.81	115	\$0.93	115	\$0.99	114
Papua New Guinea	\$0.79	113	\$0.73	107	\$0.78	112	\$0.89	111	\$0.95	114	\$0.98	115
Rwanda	\$0.55	120	\$0.56	116	\$0.59	118	\$0.77	116	\$0.87	116	\$0.92	116
Laos	\$0.81	112	\$0.66	110	\$0.63	114	\$0.57	122	\$0.75	118	\$0.87	117
Kyrgyzstan	\$0.59	119	\$0.48	120	\$0.57	119	\$0.71	117	\$0.78	117	\$0.86	118
Namibia	\$0.67	117	\$0.50	119	\$0.60	117	\$0.67	118	\$0.73	119	\$0.82	119
Mongolia	\$0.65	118	\$0.50	117	\$0.55	120	\$0.63	119	\$0.66	121	\$0.82	120
Montenegro	\$0.46	125	\$0.30	127	\$0.43	123	\$0.47	126	\$0.64	122	\$0.73	121
Seychelles	\$0.52	121	\$0.24	133	\$0.34	127	\$0.61	120	\$0.72	120	\$0.72	122
Aruba	\$0.47	124	\$0.29	128	\$0.42	124	\$0.53	123	\$0.59	125	\$0.68	123
Kosovo	\$0.48	122	\$0.44	122	\$0.54	121	\$0.58	121	\$0.63	123	\$0.66	124
Fiji	\$0.48	123	\$0.29	129	\$0.30	131	\$0.47	127	\$0.60	124	\$0.65	125
Benin	\$0.45	126	\$0.47	121	\$0.53	122	\$0.51	124	\$0.56	126	\$0.61	126
Barbados	\$0.43	127	\$0.32	125	\$0.33	129	\$0.47	125	\$0.54	127	\$0.59	127
Gabon	\$0.39	128	\$0.36	123	\$0.39	125	\$0.43	128	\$0.47	128	\$0.50	128
French Polynesia	\$0.34	130	\$0.28	130	\$0.32	130	\$0.37	129	\$0.44	129	\$0.47	129
Curacao	\$0.28	135	\$0.20	135	\$0.25	135	\$0.35	131	\$0.41	130	\$0.45	130
Belize	\$0.31	132	\$0.16	137	\$0.23	136	\$0.33	133	\$0.39	131	\$0.44	131
Equatorial Guinea	\$0.35	129	\$0.33	124	\$0.35	126	\$0.36	130	\$0.39	132	\$0.41	132
Brunei	\$0.30	133	\$0.26	131	\$0.29	132	\$0.32	134	\$0.37	133	\$0.40	133
St. Lucia	\$0.28	134	\$0.15	138	\$0.20	138	\$0.31	135	\$0.36	134	\$0.38	134
Bhutan	\$0.25	138	\$0.12	139	\$0.13	140	\$0.17	139	\$0.26	138	\$0.37	135
U.S. Virgin Islands	\$0.28	136	\$0.25	132	\$0.28	133	\$0.31	136	\$0.33	136	\$0.36	136
New Caledonia	\$0.32	131	\$0.30	126	\$0.34	128	\$0.33	132	\$0.35	135	\$0.36	137
Swaziland (Eswatini)	\$0.27	137	\$0.21	134	\$0.26	134	\$0.26	137	\$0.27	137	\$0.28	138
Mauritania	\$0.16	140	\$0.16	136	\$0.20	137	\$0.23	138	\$0.26	139	\$0.26	139
Lesotho	\$0.18	139	\$0.11	140	\$0.13	139	\$0.14	140	\$0.15	140	\$0.16	140
Timor-Leste	\$0.09	142	\$0.09	141	\$0.11	141	\$0.12	141	\$0.14	141	\$0.15	141
Grenada	\$0.10	141	\$0.06	143	\$0.07	143	\$0.11	142	\$0.12	142	\$0.14	142
St. Vincent & the Grenadines	\$0.08	144	\$0.05	145	\$0.05	145	\$0.08	144	\$0.10	144	\$0.11	143
Djibouti	\$0.08	143	\$0.08	142	\$0.09	142	\$0.09	143	\$0.10	143	\$0.11	144
Vanuatu	\$0.08	145	\$0.06	144	\$0.05	144	\$0.06	145	\$0.08	145	\$0.09	145

* 2019-2023 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 2025*.

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.

Figure 3.8: Wellness Economy and GDP Per Capita, 2024

	Wellness Economy Per Capita (2024)		GDP Per Capita (2024)	
	US\$	Rank	Current US\$	Rank
Iceland	\$7,393	1	\$87,205	5
Switzerland	\$6,375	2	\$104,523	3
Aruba	\$6,363	3	\$36,386	30
United States	\$6,293	4	\$85,812	7
Seychelles	\$5,936	5	\$21,532	56
Austria	\$5,222	6	\$56,915	14
Australia	\$5,184	7	\$66,248	12
Norway	\$4,799	8	\$86,611	6
New Zealand	\$4,630	9	\$48,310	23
Denmark	\$4,028	10	\$72,042	9
Canada	\$3,855	11	\$54,473	17
Singapore	\$3,845	12	\$90,674	4
United Kingdom	\$3,773	13	\$52,648	21
Ireland	\$3,762	14	\$106,456	2
United Arab Emirates	\$3,751	15	\$48,830	22
Finland	\$3,725	16	\$53,326	20
Hong Kong	\$3,695	17	\$54,034	19
Bahamas	\$3,686	18	\$36,167	31
Luxembourg	\$3,588	19	\$138,634	1
U.S. Virgin Islands	\$3,473	20	\$44,321	25
Netherlands	\$3,458	21	\$68,393	11
Germany	\$3,369	22	\$54,990	16
Maldives	\$3,269	23	\$17,372	64
Sweden	\$3,236	24	\$57,625	13
France	\$3,077	25	\$46,204	24
Macau	\$3,020	26	\$72,907	8
Curacao	\$2,895	27	\$18,989	60
Croatia	\$2,429	28	\$23,989	50
Taiwan	\$2,404	29	\$33,437	37
Italy	\$2,384	30	\$40,224	27
Malta	\$2,373	31	\$43,992	26
South Korea	\$2,304	32	\$36,129	32

	Wellness Economy Per Capita (2024)		GDP Per Capita (2024)	
	US\$	Rank	Current US\$	Rank
Slovenia	\$2,201	33	\$34,117	35
Spain	\$2,175	34	\$35,092	33
St. Lucia	\$2,134	35	\$13,983	70
Japan	\$2,117	36	\$32,498	38
Barbados	\$2,085	37	\$24,644	49
Belgium	\$2,053	38	\$56,271	15
Slovakia	\$1,993	39	\$25,925	46
Cyprus	\$1,965	40	\$38,625	28
Portugal	\$1,961	41	\$28,918	45
Panama	\$1,952	42	\$19,445	59
Puerto Rico	\$1,910	43	\$37,928	29
Estonia	\$1,880	44	\$31,174	41
Israel	\$1,825	45	\$54,192	18
Greece	\$1,776	46	\$24,716	48
Czech Republic	\$1,764	47	\$31,543	40
Costa Rica	\$1,700	48	\$17,909	61
Uruguay	\$1,666	49	\$23,089	55
French Polynesia	\$1,657	50	\$23,288	52
Qatar	\$1,635	51	\$71,583	10
Lithuania	\$1,593	52	\$29,339	43
Kuwait	\$1,490	53	\$31,641	39
Hungary	\$1,471	54	\$23,272	53
Bahrain	\$1,469	55	\$29,036	44
Poland	\$1,423	56	\$24,810	47
Latvia	\$1,375	57	\$23,243	54
Trinidad & Tobago	\$1,266	58	\$17,872	62
New Caledonia	\$1,236	59	\$34,613	34
Grenada	\$1,212	60	\$12,033	77
Saudi Arabia	\$1,177	61	\$30,746	42
Montenegro	\$1,165	62	\$12,664	74
St. Vincent & the Grenadines	\$1,118	63	\$10,458	80
Belize	\$1,050	64	\$8,339	88
Mauritius	\$953	65	\$11,883	78

	Wellness Economy Per Capita (2024)		GDP Per Capita (2024)	
	US\$	Rank	Current US\$	Rank
Bulgaria	\$940	66	\$17,588	63
Malaysia	\$893	67	\$12,541	75
Chile	\$874	68	\$16,439	65
Brunei	\$873	69	\$34,044	36
Romania	\$869	70	\$20,278	57
Turkey	\$850	71	\$15,463	66
Argentina	\$849	72	\$13,415	72
Oman	\$782	73	\$20,059	58
Russia	\$768	74	\$14,795	67
Mexico	\$750	75	\$14,007	69
Albania	\$716	76	\$10,013	82
Fiji	\$695	77	\$6,447	101
Serbia	\$692	78	\$13,545	71
China	\$674	79	\$13,313	73
Bosnia Herzegovina	\$645	80	\$8,334	89
Jamaica	\$635	81	\$7,299	95
North Macedonia	\$616	82	\$9,169	84
El Salvador	\$613	83	\$5,527	106
Thailand	\$596	84	\$7,492	93
Brazil	\$592	85	\$10,214	81
Peru	\$552	86	\$8,485	87
Kazakhstan	\$551	87	\$14,149	68
Georgia	\$539	88	\$9,142	85
Dominican Republic	\$482	89	\$11,542	79
Cuba	\$471	90	\$23,660	51
Bhutan	\$462	91	\$3,913	119
Guatemala	\$455	92	\$6,307	104
Ecuador	\$449	93	\$6,775	99
Kosovo	\$431	94	\$7,026	98
Moldova	\$413	95	\$7,480	94
Philippines	\$408	96	\$4,079	117
Botswana	\$404	97	\$7,117	97
South Africa	\$396	98	\$6,332	103

	Wellness Economy Per Capita (2024)		GDP Per Capita (2024)	
	US\$	Rank	Current US\$	Rank
Colombia	\$390	99	\$7,943	90
Jordan	\$363	100	\$4,693	108
Belarus	\$356	101	\$7,794	92
Armenia	\$335	102	\$8,613	86
Tunisia	\$316	103	\$4,302	114
Paraguay	\$309	104	\$6,388	102
Azerbaijan	\$286	105	\$7,251	96
Namibia	\$271	106	\$4,472	111
Vietnam	\$270	107	\$4,536	110
Morocco	\$268	108	\$4,157	115
Sri Lanka	\$267	109	\$4,325	113
Vanuatu	\$260	110	\$3,492	121
Mongolia	\$232	111	\$6,654	100
Swaziland (Eswatini)	\$224	112	\$4,421	112
Honduras	\$221	113	\$3,468	122
Equatorial Guinea	\$217	114	\$7,888	91
Gabon	\$198	115	\$9,202	83
Turkmenistan	\$198	116	\$12,506	76
Nicaragua	\$197	117	\$2,846	125
Indonesia	\$197	118	\$4,958	107
Algeria	\$196	119	\$5,682	105
Cambodia	\$184	120	\$2,755	126
Bolivia	\$177	121	\$3,939	118
Kenya	\$149	122	\$2,305	134
Iran	\$144	123	\$4,633	109
Egypt	\$126	124	\$3,570	120
India	\$124	125	\$2,711	128
Kyrgyzstan	\$119	126	\$2,471	131
Laos	\$112	127	\$2,066	135
Timor-Leste	\$106	128	\$1,438	139
Nepal	\$94	129	\$1,389	140
Papua New Guinea	\$92	130	\$2,524	130
Ghana	\$91	131	\$2,406	132

	Wellness Economy Per Capita (2024)		GDP Per Capita (2024)	
	US\$	Rank	Current US\$	Rank
Djibouti	\$91	132	\$4,082	116
Cote d'Ivoire	\$84	133	\$2,723	127
Uzbekistan	\$84	134	\$3,113	123
Angola	\$77	135	\$3,054	124
Senegal	\$71	136	\$1,763	136
Lesotho	\$69	137	\$1,067	143
Rwanda	\$64	138	\$1,028	144
Zambia	\$63	139	\$1,246	141
Bangladesh	\$52	140	\$2,622	129
Mauritania	\$51	141	\$2,362	133
Tanzania	\$50	142	\$1,229	142
Benin	\$42	143	\$1,507	138
Nigeria	\$38	144	\$824	145
Pakistan	\$37	145	\$1,581	137

For more information on the wellness economy data, see the companion GWI report: *Global Wellness Economy Monitor 2025*.

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 2025 Edition (GDP data).

Figure 3.9: Wellness Economy and Tourism as a Percent of GDP, 2019 and 2024

	Wellness Economy as a % of GDP (In US\$)			Overall Tourism as a % of GDP (In US\$)		
	% of GDP 2019	% of GDP 2024	Rank in 2024	% of GDP 2019	% of GDP 2024	Rank in 2024
Seychelles	27.59%	33.22%	1	48.17%	45.59%	3
Maldives	17.70%	24.58%	2	55.59%	80.98%	2
Aruba	14.05%	17.33%	3	67.13%	81.60%	1
St. Lucia	13.59%	15.20%	4	26.17%	24.54%	10
Curacao	9.38%	12.81%	5	24.87%	38.65%	4
Belize	12.80%	12.78%	6	21.93%	17.30%	16
Bhutan	9.39%	11.82%	7	26.22%	30.59%	7
El Salvador	10.19%	11.00%	8	6.32%	12.44%	29
Fiji	8.82%	10.85%	9	31.72%	36.16%	6
Philippines	9.56%	10.24%	10	19.11%	14.62%	22
Grenada	8.40%	10.20%	11	14.77%	16.92%	17
Croatia	9.14%	10.15%	12	20.64%	17.35%	15
Panama	10.12%	10.05%	13	10.43%	11.25%	31
Bahamas	8.75%	10.02%	14	36.15%	37.66%	5
St. Vincent & the Grenadines	8.53%	9.68%	15	14.08%	13.34%	27
New Zealand	8.40%	9.59%	16	11.94%	9.02%	39
Austria	8.56%	9.19%	17	7.80%	7.20%	49
Costa Rica	8.54%	9.14%	18	7.01%	6.01%	57
Montenegro	8.38%	9.06%	19	23.90%	24.55%	9
Jamaica	8.40%	8.98%	20	24.51%	23.27%	12
Iceland	8.24%	8.94%	21	14.53%	14.21%	24
Barbados	7.36%	8.22%	22	13.79%	12.53%	28
Thailand	7.67%	8.11%	23	16.89%	15.08%	21
Mauritius	6.61%	8.03%	24	14.08%	18.49%	14
Jordan	7.00%	7.86%	25	15.16%	14.25%	23
Australia	7.04%	7.85%	26	7.91%	7.13%	50
Slovakia	7.63%	7.68%	27	10.97%	8.12%	43
United Arab Emirates	5.00%	7.60%	28	11.80%	16.39%	18
Malaysia	7.58%	7.57%	29	9.21%	8.75%	41
Guatemala	7.13%	7.44%	30	2.63%	2.30%	117
Timor-Leste	4.55%	7.40%	31	N/A	N/A	N/A

	Wellness Economy as a % of GDP (In US\$)			Overall Tourism as a % of GDP (In US\$)		
	% of GDP 2019	% of GDP 2024	Rank in 2024	% of GDP 2019	% of GDP 2024	Rank in 2024
Cyprus	8.04%	7.38%	32	13.19%	11.81%	30
United States	6.79%	7.33%	33	4.96%	4.14%	76
Tunisia	6.92%	7.32%	34	10.48%	8.72%	42
U.S. Virgin Islands	6.71%	7.22%	35	24.09%	25.63%	8
Greece	6.46%	7.18%	36	8.49%	8.07%	44
United Kingdom	6.11%	7.17%	37	2.49%	2.31%	116
Albania	7.50%	7.13%	38	16.67%	24.26%	11
Taiwan	7.19%	7.13%	39	3.87%	2.48%	111
French Polynesia	5.72%	7.11%	40	17.33%	18.77%	13
Canada	6.22%	7.10%	41	3.98%	3.27%	95
Bosnia Herzegovina	7.29%	7.08%	42	4.39%	4.01%	79
Vanuatu	8.26%	7.07%	43	12.43%	1.50%	128
Finland	6.61%	7.03%	44	5.58%	3.97%	80
Lesotho	7.65%	7.03%	45	4.54%	4.78%	67
Uruguay	6.89%	6.97%	46	4.98%	4.05%	77
Kenya	7.06%	6.93%	47	2.54%	2.38%	112
Nicaragua	7.26%	6.91%	48	3.42%	2.22%	119
Cambodia	7.07%	6.85%	49	15.53%	10.43%	35
Hong Kong	7.23%	6.83%	50	4.93%	3.84%	83
Portugal	6.67%	6.80%	51	12.96%	13.76%	26
Trinidad & Tobago	5.11%	6.79%	52	7.34%	10.87%	34
Ecuador	7.13%	6.69%	53	3.72%	3.31%	92
France	5.80%	6.67%	54	7.16%	7.64%	46
North Macedonia	6.17%	6.62%	55	4.65%	6.51%	53
Morocco	5.26%	6.58%	56	5.02%	7.56%	47
Peru	6.53%	6.53%	57	4.86%	4.03%	78
Japan	5.67%	6.52%	58	2.82%	3.56%	89
Honduras	6.30%	6.47%	59	4.12%	3.60%	88
Slovenia	6.61%	6.46%	60	7.06%	5.92%	58
Rwanda	5.28%	6.45%	61	6.03%	6.47%	54
Nepal	5.39%	6.41%	62	2.56%	2.34%	115
South Korea	5.99%	6.38%	63	2.26%	2.49%	110
South Africa	5.44%	6.34%	64	3.11%	3.90%	81

	Wellness Economy as a % of GDP (In US\$)			Overall Tourism as a % of GDP (In US\$)		
	% of GDP 2019	% of GDP 2024	Rank in 2024	% of GDP 2019	% of GDP 2024	Rank in 2024
Hungary	5.99%	6.30%	65	7.18%	6.61%	52
Spain	5.63%	6.16%	66	9.55%	10.18%	37
Switzerland	6.31%	6.15%	67	3.60%	3.15%	99
Namibia	5.38%	6.14%	68	4.18%	4.98%	64
Argentina	5.27%	6.14%	69	2.71%	1.73%	126
Germany	5.48%	6.04%	70	3.26%	2.95%	103
Estonia	5.71%	6.03%	71	7.57%	6.06%	56
Vietnam	5.47%	5.94%	72	5.47%	4.60%	72
Italy	5.49%	5.93%	73	5.28%	4.47%	74
Sri Lanka	5.47%	5.92%	74	5.42%	4.93%	65
Kosovo	6.10%	5.91%	75	1.87%	3.27%	96
Latvia	5.68%	5.89%	76	3.50%	2.51%	108
Georgia	7.17%	5.86%	77	22.34%	15.50%	19
Brazil	6.06%	5.78%	78	4.07%	3.28%	94
Poland	5.55%	5.72%	79	3.13%	2.49%	109
Denmark	5.24%	5.61%	80	4.46%	4.71%	70
Sweden	5.23%	5.61%	81	5.38%	5.35%	62
Malta	5.58%	5.60%	82	11.81%	11.22%	32
Czech Republic	5.43%	5.57%	83	3.87%	3.47%	90
Norway	5.26%	5.53%	84	4.93%	4.88%	66
Turkey	5.46%	5.50%	85	6.37%	5.71%	59
Laos	4.30%	5.49%	86	8.31%	7.32%	48
Moldova	5.84%	5.45%	87	2.20%	0.66%	139
Lithuania	5.98%	5.42%	88	3.12%	2.37%	114
Bulgaria	6.19%	5.40%	89	11.34%	6.36%	55
Swaziland (Eswatini)	6.05%	5.35%	90	2.10%	3.09%	100
Mexico	4.72%	5.30%	91	11.85%	9.72%	38
Botswana	5.13%	5.26%	92	4.33%	3.79%	84
Chile	5.87%	5.23%	93	3.30%	3.07%	101
Serbia	6.14%	5.12%	94	2.91%	2.92%	104
Zambia	4.46%	5.12%	95	3.54%	3.20%	98
Russia	5.19%	5.10%	96	2.07%	1.35%	132
Netherlands	4.51%	5.07%	97	3.64%	3.68%	86

	Wellness Economy as a % of GDP (In US\$)			Overall Tourism as a % of GDP (In US\$)		
	% of GDP 2019	% of GDP 2024	Rank in 2024	% of GDP 2019	% of GDP 2024	Rank in 2024
China	4.94%	5.07%	98	6.35%	4.73%	68
Puerto Rico	4.41%	5.06%	99	3.83%	3.72%	85
Bahrain	4.65%	4.97%	100	9.72%	13.92%	25
Kyrgyzstan	6.24%	4.94%	101	15.23%	11.04%	33
Colombia	4.29%	4.93%	102	4.70%	3.90%	82
Paraguay	4.44%	4.87%	103	3.62%	2.90%	106
Nigeria	2.75%	4.68%	104	0.94%	0.69%	137
Kuwait	4.51%	4.67%	105	0.30%	0.36%	142
India	3.72%	4.61%	106	5.18%	4.53%	73
Belarus	4.37%	4.57%	107	6.35%	5.42%	61
Bolivia	4.25%	4.54%	108	3.36%	2.91%	105
Dominican Republic	4.35%	4.42%	109	9.53%	10.28%	36
Romania	4.10%	4.31%	110	3.40%	3.62%	87
Tanzania	4.17%	4.27%	111	4.94%	5.53%	60
Singapore	4.07%	4.24%	112	5.08%	3.30%	93
Macau	3.76%	4.13%	113	11.36%	15.45%	20
Indonesia	3.89%	3.99%	114	5.02%	4.73%	69
Kazakhstan	4.01%	3.98%	115	1.96%	1.34%	133
Armenia	4.96%	3.97%	116	11.45%	9.01%	40
Senegal	4.33%	3.97%	117	2.51%	1.98%	121
Azerbaijan	4.16%	3.93%	118	4.54%	2.88%	107
Oman	3.72%	3.86%	119	5.15%	5.08%	63
Egypt	4.67%	3.84%	120	5.00%	4.19%	75
Saudi Arabia	2.78%	3.83%	121	5.00%	6.99%	51
Ghana	3.72%	3.80%	122	2.34%	1.87%	123
Belgium	3.61%	3.67%	123	3.72%	3.00%	102
New Caledonia	3.36%	3.57%	124	3.16%	1.87%	122
Ireland	3.69%	3.51%	125	4.24%	2.37%	113
Mongolia	4.59%	3.47%	126	4.85%	3.25%	97
Algeria	3.93%	3.47%	127	0.32%	0.16%	143
Israel	3.66%	3.37%	128	3.94%	1.64%	127
Iran	4.47%	3.29%	129	3.13%	1.47%	129
Equatorial Guinea	3.10%	3.27%	130	2.04%	2.02%	120

	Wellness Economy as a % of GDP (In US\$)			Overall Tourism as a % of GDP (In US\$)		
	% of GDP 2019	% of GDP 2024	Rank in 2024	% of GDP 2019	% of GDP 2024	Rank in 2024
Papua New Guinea	3.18%	3.08%	131	2.24%	1.86%	124
Cote d'Ivoire	2.92%	3.08%	132	1.17%	1.38%	130
Benin	3.16%	2.87%	133	1.67%	1.37%	131
Uzbekistan	2.80%	2.65%	134	2.76%	3.42%	91
Brunei	2.25%	2.61%	135	1.77%	1.75%	125
Luxembourg	2.96%	2.61%	136	4.45%	4.64%	71
Angola	2.24%	2.53%	137	1.01%	0.37%	140
Djibouti	2.58%	2.51%	138	2.04%	1.23%	135
Pakistan	2.27%	2.50%	139	1.93%	1.24%	134
Mauritania	2.09%	2.47%	140	0.50%	0.37%	141
Gabon	2.32%	2.43%	141	3.10%	2.30%	118
Qatar	1.64%	2.11%	142	4.63%	7.68%	45
Bangladesh	1.95%	2.01%	143	0.13%	0.11%	144
Cuba	3.01%	1.99%	144	2.54%	0.68%	138
Turkmenistan	1.84%	1.79%	145	1.43%	1.02%	136

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 2025*.

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 2025 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 *Global Wellness Economy Monitor 2025* report.⁸

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.

⁸ Johnston, K. (2025). *Global Wellness Economy Monitor 2025*. Miami, FL: Global Wellness Institute. <https://globalwellnessinstitute.org/2025-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.

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The GWI research team first started to define and measure the various sectors of the wellness economy in 2008. 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. We are indebted to many individuals for their knowledge, insights, and data sharing. We want to give special thanks to **Tomonori Maruyama** for his help in accessing and analyzing data in the Japanese spa, hot springs, and hospitality sectors. We express special appreciation to **Melissa Rodriguez** for sharing data from the Health & Fitness Association on the global fitness industry. For our analysis of the wellness real estate sector, we benefitted tremendously from the guidance of **Teri Slavik-Tsuyuki** and the members of GWI's Wellness Communities & Real Estate Initiative, as well as colleagues from the **International Well Building Institute/WELL** and the **Center for Active Design/Fitwel**.

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Alexia Brue is the co-founder of Well+Good, the award-winning wellness media company, and is SVP of the Fitness & Wellness Group at Leaf Group. Since its launch in 2010, Well+Good has received three Webby Awards and a spot on Fast Company's Most Innovative Company in Wellness. Alexia's expertise in digital media, entrepreneurship and wellness has been featured in outlets including CBS This Morning, Good Morning America, *The New York Times*, *Fast Company*, *Forbes*, Yahoo Finance, *AdWeek*, *Digiday*, and others.



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Nancy Davis has decades of experience in strategic communications for Fortune 100 companies. Since joining the Global Wellness Summit (GWS) in 2013, Nancy has helped expand the organization's global footprint through events and activities that promote the mission of both the GWS and the nonprofit Global Wellness Institute™ (GWI). She infuses her work with passion and creativity.



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Susie Ellis is the co-founder, chair and CEO of the Global Wellness Summit and chairman and CEO of the Global Wellness Institute, the nonprofit research and educational resource for the global wellness industry known for its pioneering research reports, wide-ranging initiatives, Geography of Wellness, wellnessevidence.com and *The Wellness Moonshot: A World Free of Preventable Disease*. Susie is frequently quoted in major news outlets around the world. She sits on numerous academic and industry boards and holds an MBA from UCLA.



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Michelle Floh is the managing partner of Castlefield Consulting, advising across global health, technology, and finance. Her experience spans partnerships with multinational healthcare, medical device, and pharmaceutical companies, as well as global banks, venture funds, and private equity investors. She operates at the intersection of innovation, investment, and wellbeing—helping organizations design scalable, data-enabled solutions that strengthen health access and gender equity. Michelle is recognized for bridging commercial and philanthropic systems to accelerate sustainable impact across diverse markets.



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Aradhana Khowala is one of the world's leading voices in travel, tourism and hospitality. Over the last 24 years she has worked in five continents, and with more than 85 countries, at the intersection of luxury hospitality, wellness and regenerative growth, engaging presidents, prime ministers and global leaders on harnessing tourism as a catalyst for economic vitality, climate action and human progress. Today, she is the CEO of Aptamind Partners, the go-to strategic consultancy for governments, emerging destinations and public and private organizations seeking regenerative tourism development solutions.



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Victor Koo founded Heyi Holdings in 2005, which incubated Youku in 2006. As chairman and CEO, he led Youku to become a leading multiscreen media and entertainment company in China. Today, Victor serves as chairman of Heyi, which merged with Alibaba Entertainment in 2016. Victor also co-founded Tianren Culture, a social platform focusing on healthy and sustainable lifestyles and a strategic partner of GWI's *The Wellness Moonshot: A World Free of Preventable Disease*. He received his MBA from Stanford Graduate School of Business, where he serves on the Advisory Council, and was a Regent's Scholar at the University of California, Berkeley.



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Mia Kyracos is a globally-respected thought-leader in the business of wellness, wellbeing and hospitality with a specialty in brand strategy and communications. She has developed, operated and marketed brands and facilities across 100+ countries in her leadership positions at Hyatt Hotels Corporation, Spafinder Wellness, Starwood Hotels & Resorts, among others, and at Kyracos & Associates, LLC. Mia sits on the advisory boards of Cornell University's SC Johnson School of Business, Wellness for Cancer and the Global Wellness Institute.



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Renee Moorefield is CEO of Wisdom Works, dedicated to building thriving leaders and organizations worldwide. She's coached thousands of senior and emerging executives—from Fortune 500 teams to social entrepreneurs—seeking to operate from greater consciousness, wellbeing and internal balance. Renee also chairs GWI's Wellness at Work Initiative and is the author of the monthly communications for the inspirational calendar supporting The Wellness Moonshot: A World Free of Preventable Disease.



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Freddie Moross is the managing director of Myndstream, which creates and designs music for health and wellbeing and is part of the Cutting Edge Group, the leading international full-service provider of music for media. His mission is to unlock the full potential of audio environments and pursue improved health outcomes through musical composition. Freddie received the Debra Simon Award for Leader in Furthering Mental Wellness at the 2022 Global Wellness Summit and is known as a disruptive thought leader.



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A seasoned entrepreneur, strategist and change agent, Laurie Racine is addicted to start-up cultures. She has launched or secured funding for a variety of cutting-edge nonprofit and for-profit enterprises. Laurie founded dotSUB, the video translation platform that is well known for powering TED's open translation project and was a principal at Eyespot, an early leader in video remix technology. She also serves on various for-profit and nonprofit boards.



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Michael Roizen, MD, serves as chief wellness officer at Cleveland Clinic, the first such position at a major US healthcare institution. He's also chairman of the Wellness Institute there; has published 175+ peer-reviewed scientific papers, 100 textbook chapters, and four medical books; received 13 US (and many foreign) patents; and hosted six PBS specials. His *RealAge* and *YOU* series of books has resulted in four #1 *New York Times* bestsellers.



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Jean Sung is an advisory board member at Audacy, bringing 20 years of impact leadership from JPMorgan, where she shaped strategic philanthropy across Asia as the head of The Philanthropy Centre, Asia for J.P. Morgan Private Bank. She pioneered blended-finance models, workforce skills programs and cross sector alliances that moved billions toward measurable outcomes. Now, Jean guides Audacy's mission to scale climate solutions in APAC, bridging private capital, philanthropy and policy for gigaton impact. Jean is recognized for her ability to identify social gaps and for her wealth of cross-sector and multilateral networks that help build collaborative alliances between the private and social sectors.

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Dr. Richard H. Carmona was the 17th Surgeon General of the United States. He is also a decorated US Army Special Forces Veteran and a distinguished professor with a wide range of training and experience in healthcare management, clinical care and research. Currently, he is chief of health innovation of Canyon Ranch and serves as director on several publicly traded corporate boards and private companies.



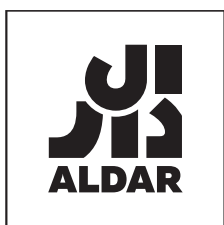
SUE HARMSWORTH

Founder of ESPA & SATCC, United Kingdom

Sue Harmsworth is an inspirational and visionary leader who over the past 45 years has shaped the spa and wellness industry as we know it today. She founded the global brand ESPA in 1993 and sold it in 2017. Sue is responsible for the design of over 500 award winning spas in 65 countries and for creating ground breaking products, treatments and wellbeing programs globally. Sue has an MBE from the Queen for services to the spa and beauty industry, is a recipient of the GWS Leading Woman in Wellness, the ISPA Visionary Award, American Spa Industry Icon, CEW's achiever award and sits on the Advisory Board for Global Wellness Institute, Red Sea Global, Forbes Strategy, Trivananda and NCICC. Sue is currently advising owners and private equity on concepts for integrative wellness, medical destinations, advance aesthetics and skincare.

Geography of Wellness Country Partners

The Geography of Wellness is a groundbreaking 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 country partner, see: <https://globalwellnessinstitute.org/geography-of-wellness/become-a-partner/>.**



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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 wellbeing, 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 wellbeing. Visit www.stb.gov.sg.

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