GLOBAL WELLNESS INSTITUTE®
EMPOWERING WELLNESS WORLDWIDE

The Global Wellness Economy: Thailand

Data for 2019-2024

The Global Wellness Economy: THAILAND

DATA FOR 2019-2024

GLOBAL WELLNESS INSTITUTE™
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Suggested citation:

Johnston, K. (2026). *The Global Wellness Economy: Thailand (2019-2024 Data)*. Miami, FL: Global Wellness Institute. https://globalwellnessinstitute.org/wellness-in-thailand/.

For more information, please contact research@globalwellnessinstitute.org or visit www.globalwellnessinstitute.org.

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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: Thailand 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 Multidimensional

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.

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 that wellness was defined and measured as a global industry, with underlying sector-level and country-level data. Since then, we have published updated figures on the wellness economy for 2015, 2017, 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 and sector 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 the Global Wellness Institute (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 that 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 that are used for making GWI's estimates for certain sectors and subsectors.

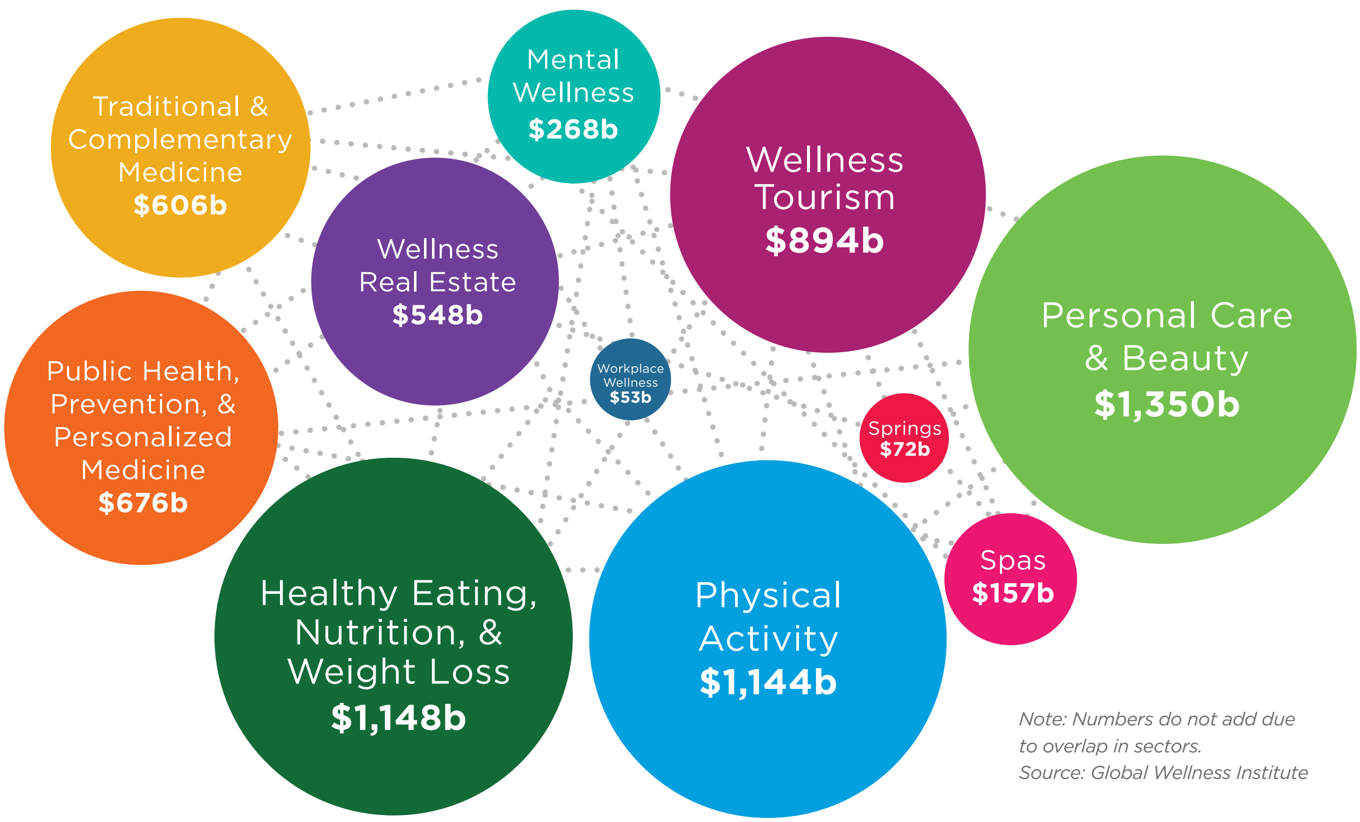
For more details on the data presented in this report, including global/regional data and sectoral breakdowns, see: *Global Wellness Economy Monitor 2025*, https://globalwellnessinstitute.org/2025-global-wellness-economy-monitor/.

CHAPTER 1

The Global Wellness Economy

$6.8 trillion Global Market In 2024	**6.2%** CAGR 2019-2024

Figure 1.1:
GLOBAL WELLNESS ECONOMY:
$6.8 trillion in 2024



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

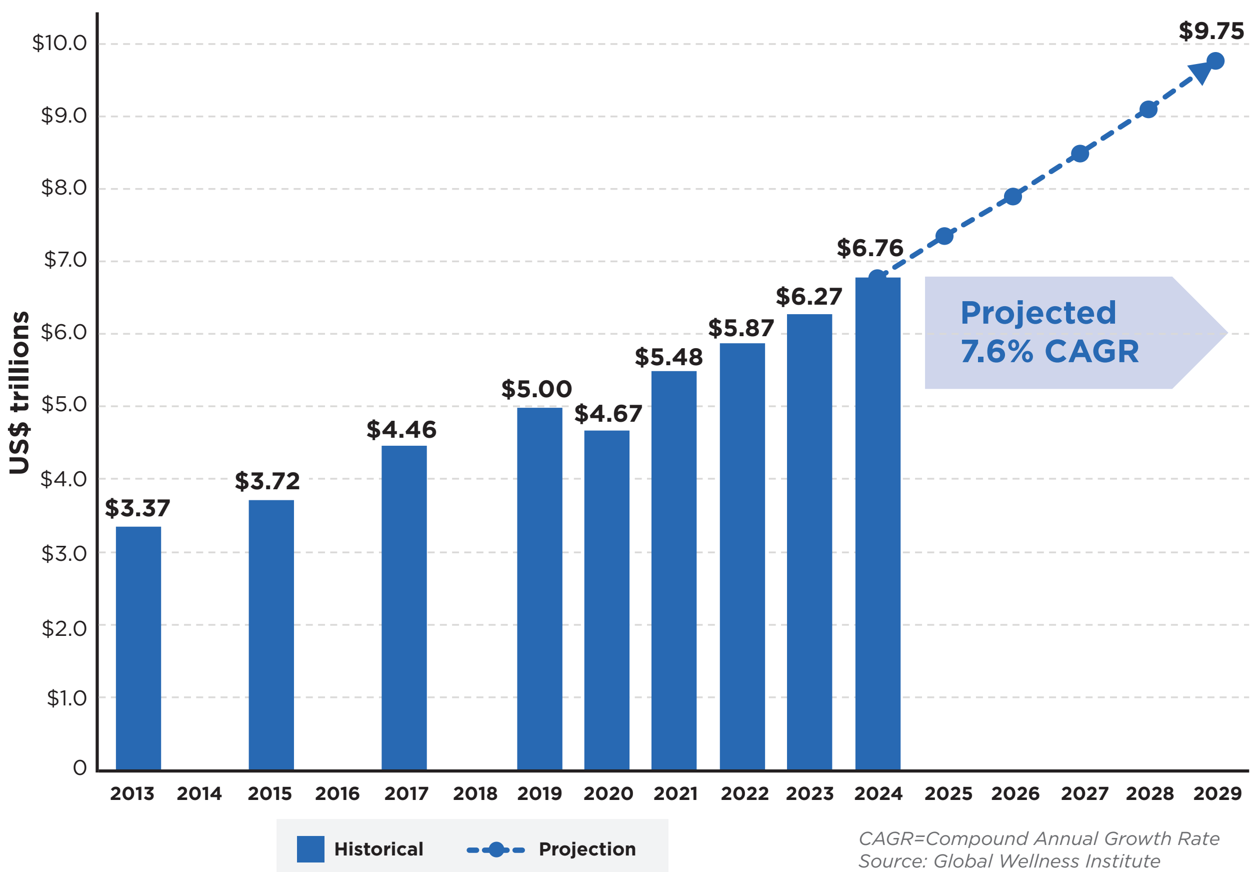
The global wellness economy has doubled in size in just eleven years, reaching a new peak of $6.8 trillion in 2024.

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 that 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 current 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, 2013-2024



CAGR=Compound Annual Growth Rate
Source: Global Wellness Institute

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

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

In the last few years, North America has surpassed Asia-Pacific to become the largest regional wellness economy (see *Figure 1.3*), a shift that 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. 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. 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 (e.g., $607 in Latin America-Caribbean, $471 in Asia-Pacific, and $339 in Middle East-North Africa).

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 the table below for each region is made by residents of that region.

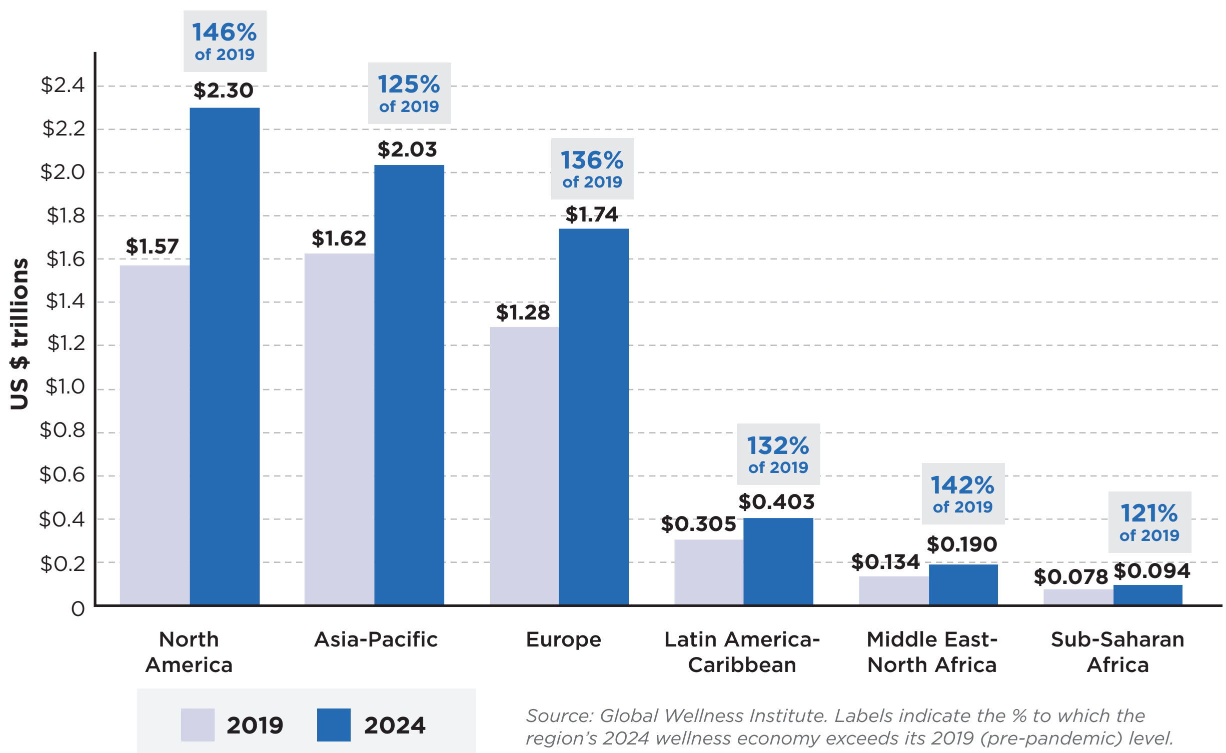
Figure 1.3: Wellness Economy by Region, 2019-2024

	Wellness Economy (US$ billions)						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
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.

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 1.4*). **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.

Figure 1.4: Size and Recovery of the Wellness Economy by Region, 2019 Versus 2024



Source: Global Wellness Institute. Labels indicate the % to which the region's 2024 wellness economy exceeds its 2019 (pre-pandemic) level.

CHAPTER 2

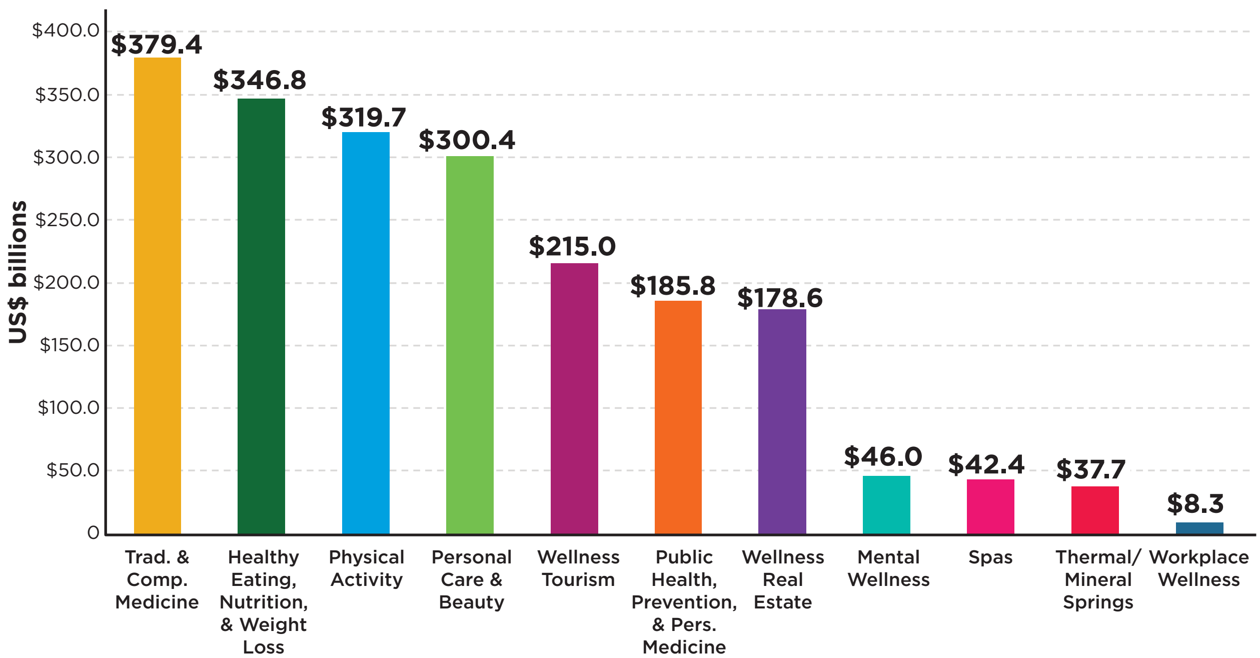
The Wellness Economy in Asia-Pacific

Figure 2.1: 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%

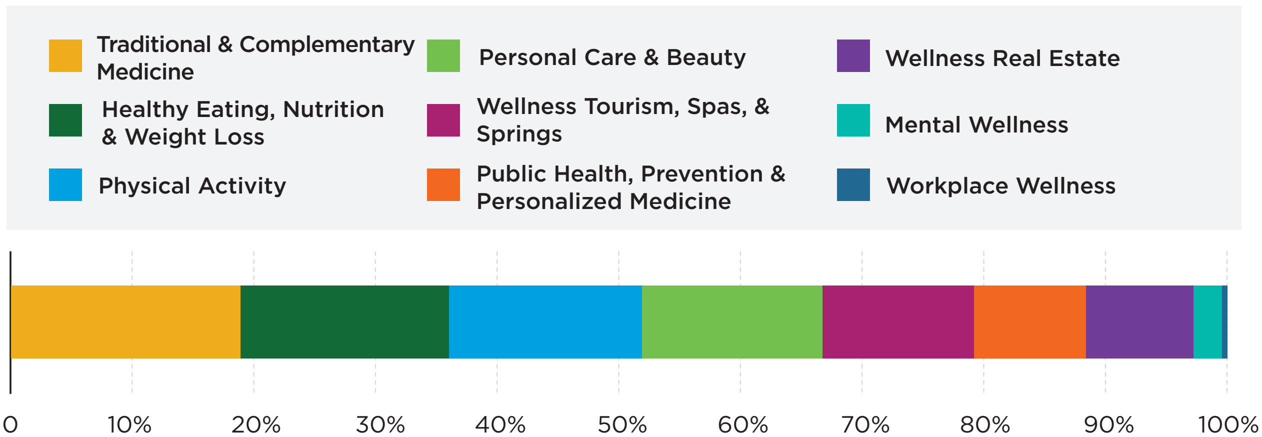
** 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.*
Note: Figures for the eleven sectors shown below do not sum to the regional total due to overlap in sectors.
Source: Global Wellness Institute (based on extensive primary research and 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).

Figure 2.2: Asia-Pacific Wellness Economy Sectors, 2024



Source: Global Wellness Institute
Note: Figures for the eleven sectors do not sum to the regional total due to overlap in sectors.

Figure 2.3: Asia-Pacific Composition of the Wellness Economy, 2024



Source: Global Wellness Institute

Figure 2.4: 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
Indonesia	$55.77
Taiwan	$55.81
Philippines	$47.27
Thailand	$42.71
Malaysia	$31.77

Source: Global Wellness Institute

CHAPTER 3

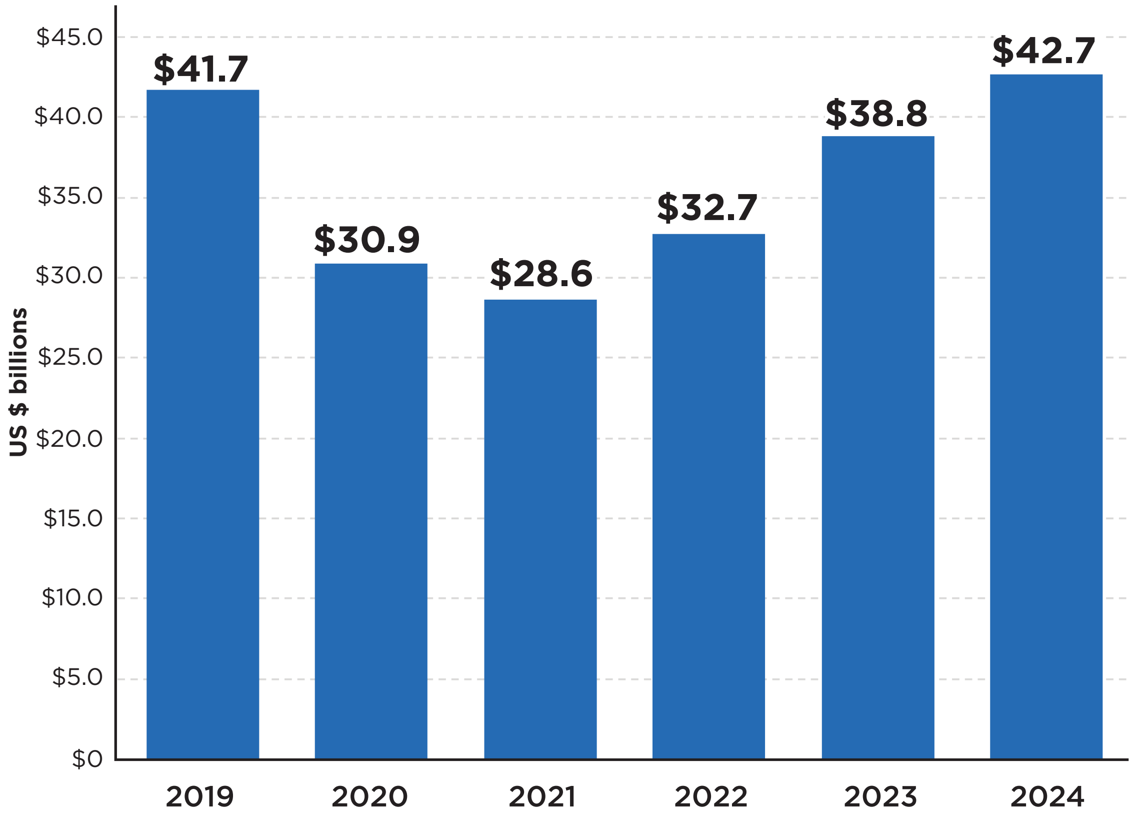
The Wellness Economy in Thailand

$42.7b
Wellness Economy In 2024

#24
Global Rank
Out of 218 Countries Worldwide

#9
Regional Rank
Out of 45 Countries in Asia-Pacific

Figure 3.1: Wellness Economy Market Size in Thailand, 2019-2024



Source: Global Wellness Institute.
Note: 2019-2023 figures have been revised since the previous version of the Global Wellness Economy Monitor.

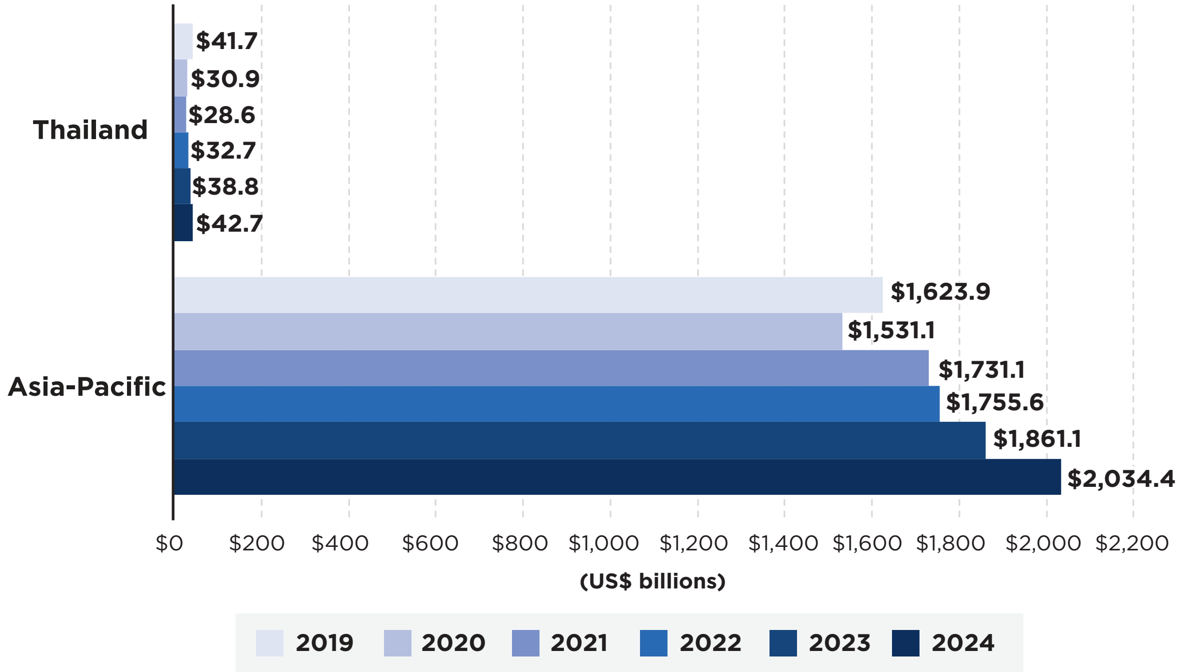
A. Overview of Thailand's Wellness Economy

Figure 3.2: Wellness Economy Top Line Data for Thailand, 2019-2024

	2019*	2020*	2021*	2022*	2023*	2024
Wellness Economy (US$ billions)	**$41.7**	**$30.9**	**$28.6**	**$32.7**	**$38.8**	**$42.7**
Wellness Economy Regional Ranking *(out of 45 countries in Asia-Pacific)*	*#8*	*#9*	*#9*	*#9*	*#9*	*#9*
Wellness Economy Global Ranking *(out of 218 countries worldwide)*	*#20*	*#24*	*#26*	*#26*	*#25*	*#24*
Wellness Economy Per Capita (US$)	**$583**	**$431**	**$399**	**$456**	**$541**	**$596**
Wellness Economy as a % of Country GDP	**7.67%**	**6.17%**	**5.65%**	**6.46%**	**7.52%**	**8.11%**

** 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 on the following pages do not sum to the country total due to overlap in sectors.
Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, April 2025 Edition (GDP data); World Bank World Development Indicators (population data).

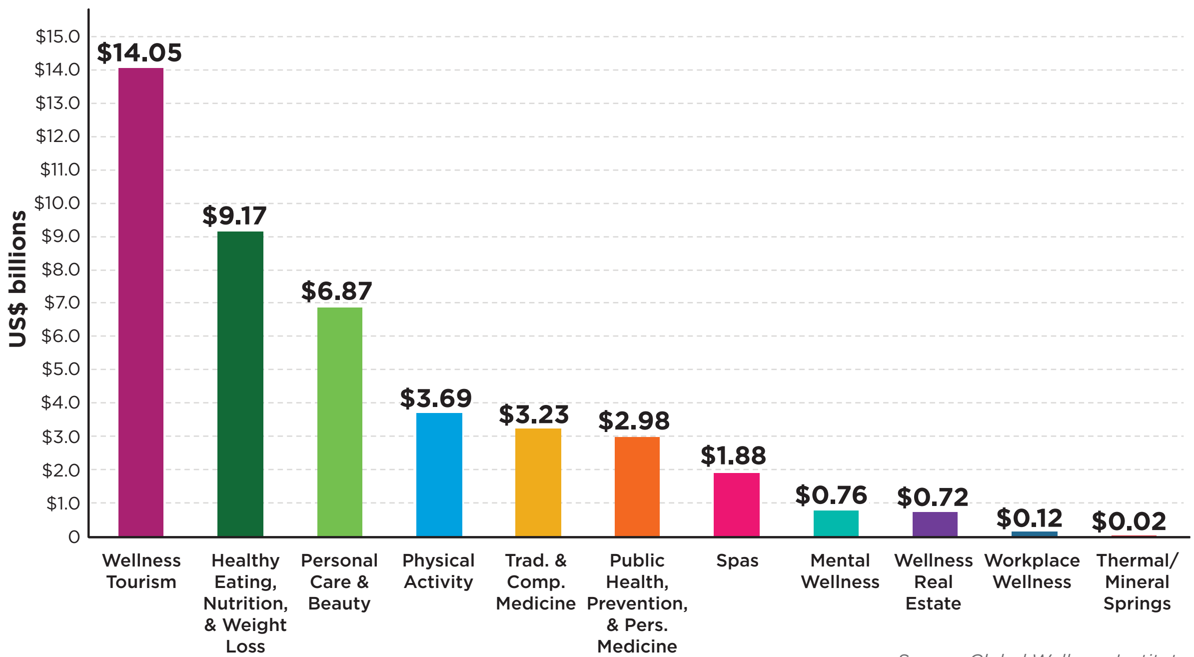
Figure 3.3: Wellness Economy in Thailand and Asia-Pacific, 2019-2024



Source: Global Wellness Institute. Note: 2019-2023 figures have been revised since the previous version of the Global Wellness Economy Monitor.

B. Wellness Economy Sectors in Thailand

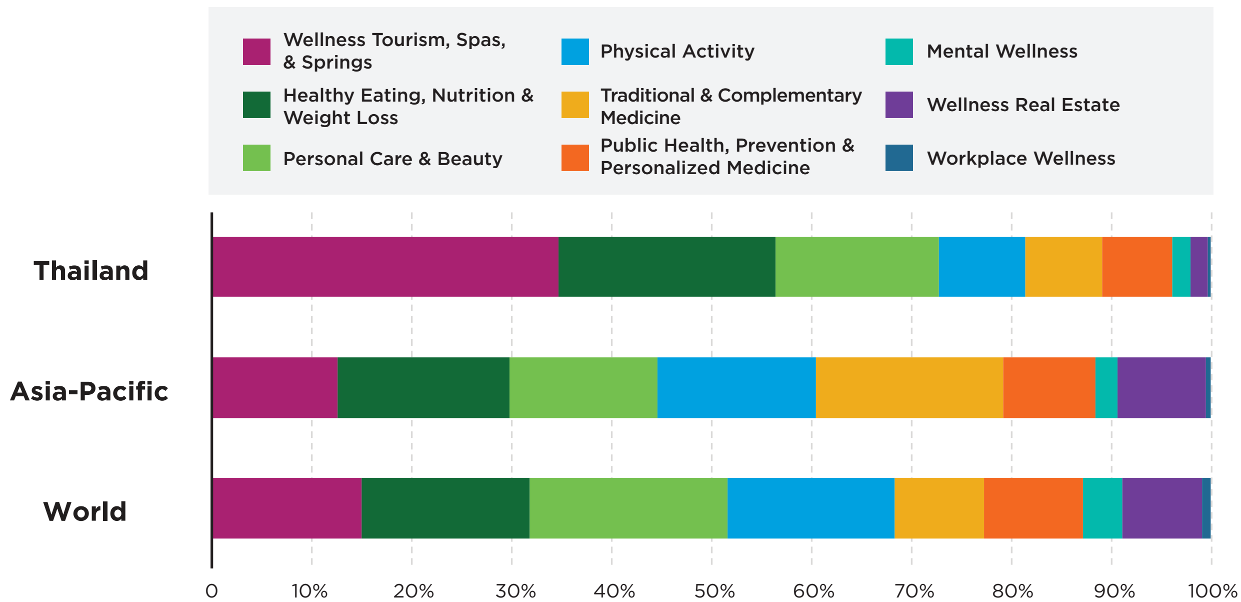
Figure 3.4: Wellness Economy Sectors in Thailand, 2024



Source: Global Wellness Institute

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

Figure 3.5: Composition of the Wellness Economy, 2024



Source: Global Wellness Institute

Figure 3.6: Wellness Economy Sectors in Thailand, 2019-2024

	Market Size (US$ billions)						Global Rank	Average Annual Growth Rate	
	2019*	**2020***	**2021***	**2022***	**2023***	**2024**	**2024**	**2023-2024**	**2019-2024**
Wellness Tourism	$15.89	$4.14	$1.62	$5.62	$10.31	$14.05	**#15**	*36.4%*	*-2.4%*
Healthy Eating, Nutrition, & Weight Loss	$8.55	$9.16	$8.59	$8.26	$8.88	$9.17	**#22**	*3.2%*	*1.4%*
Personal Care & Beauty	$6.85	$6.84	$6.99	$6.71	$7.27	$6.87	**#33**	*-5.6%*	*0.1%*
Physical Activity	$3.79	$3.61	$3.46	$3.31	$3.48	$3.69	**#33**	*5.9%*	*-0.6%*
Traditional & Complementary Medicine	$2.81	$2.65	$2.82	$3.20	$3.40	$3.23	**#18**	*-5.0%*	*2.9%*
Public Health, Prevention, & Personalized Medicine	$1.75	$2.89	$3.45	$3.55	$3.17	$2.98	**#29**	*-6.1%*	*11.1%*
Spas	$1.66	$1.07	$1.13	$1.46	$1.59	$1.88	**#18**	*18.0%*	*2.6%*
Mental Wellness	$0.447	$0.462	$0.464	$0.779	$0.964	$0.757	**#34**	*-21.5%*	*11.1%*
Wellness Real Estate	$0.353	$0.389	$0.432	$0.496	$0.585	$0.719	**#31**	*22.9%*	*15.3%*
Workplace Wellness	$0.127	$0.120	$0.118	$0.115	$0.113	$0.117	**#41**	*3.6%*	*-1.6%*
Thermal/Mineral Springs	$0.020	$0.013	$0.015	$0.019	$0.022	$0.022	**#75**	*4.0%*	*2.0%*
Wellness Economy	**$41.71**	**$30.89**	**$28.61**	**$32.70**	**$38.79**	**$42.71**	**#24**	***10.1%***	***0.5%***

** 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.*
Note: Figures do not sum to total due to overlap in segments. Rankings are out of 218 countries worldwide.
Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

C. Details for Selected Wellness Economy Sectors in Thailand

Wellness Real Estate

Figure 3.7: Wellness Real Estate Market in Thailand, 2019-2024

	Market Size (US$ billions)						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
Total Construction Output	$34.46	$34.87	$36.50	$33.62	$33.99	$34.87	*2.6%*	*0.2%*
Wellness Real Estate	**$0.35**	**$0.39**	**$0.43**	**$0.50**	**$0.58**	**$0.72**	***22.9%***	***15.3%***
Percent of Construction Output with a Wellness Focus	*1.03%*	*1.11%*	*1.18%*	*1.48%*	*1.72%*	*2.06%*	*N/A*	*N/A*

** 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.*
Source: Global Wellness Institute, based on construction output data from the United Nations.

Physical Activity

Figure 3.8: Physical Activity Market by Subsector in Thailand, 2019-2024

	Market Size (US$ billions)						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
Recreational Physical Activity	**$0.879**	**$0.657**	**$0.659**	**$0.775**	**$0.880**	**$0.955**	***8.6%***	***1.7%***
Fitness	$0.432	$0.244	$0.251	$0.361	$0.413	$0.472	*14.3%*	*1.8%*
Sports & Active Recreation	$0.391	$0.358	$0.353	$0.359	$0.404	$0.424	*4.9%*	*1.6%*
Mindful Movement	$0.057	$0.055	$0.055	$0.055	$0.063	$0.060	*-5.3%*	*1.0%*
Enabling Sectors	**$2.919**	**$2.965**	**$2.809**	**$2.549**	**$2.620**	**$2.752**	***5.0%***	***-1.2%***
Sports Apparel & Footwear	$1.946	$1.642	$1.637	$1.573	$1.696	$1.801	*6.2%*	*-1.5%*
Fitness Technology	$0.483	$0.851	$0.632	$0.539	$0.471	$0.496	*5.3%*	*0.5%*
Sports & Fitness Equipment	$0.494	$0.479	$0.550	$0.445	$0.463	$0.466	*0.7%*	*-1.2%*
TOTAL	**$3.794**	**$3.613**	**$3.456**	**$3.309**	**$3.482**	**$3.686**	***5.9%***	***-0.6%***

** 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.*
Note: Figures do not sum to total due to overlap in segments and rounding. See Appendix for detailed descriptions of the subsectors. *Source: Global Wellness Institute.*

Healthy Eating, Nutrition, & Weight Loss

Figure 3.9: Healthy Eating, Nutrition, & Weight Loss Market by Subsector in Thailand, 2019-2024

	Market Size (US$ billions)						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
Healthy-Labeled Foods & Beverages	$5.606	$5.570	$5.515	$5.170	$5.599	$5.640	*0.7%*	*0.1%*
Vitamins & Supplements	$1.998	$2.001	$2.113	$2.126	$2.207	$2.376	*7.7%*	*3.5%*
Weight Loss Products & Services	$0.944	$1.595	$0.963	$0.964	$1.072	$1.151	*7.4%*	*4.0%*
TOTAL	**$8.548**	**$9.165**	**$8.591**	**$8.261**	**$8.878**	**$9.167**	***3.2%***	***1.4%***

** 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. See Appendix for detailed descriptions of the subsectors.
Source: Global Wellness Institute, based on data from Euromonitor, IBISWorld, and other sources.

Mental Wellness

Figure 3.10: Mental Wellness Market by Subsector in Thailand 2019-2024

	Market Size (US$ billions)						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
Brain-Boosting Nutraceuticals & Botanicals	$0.238	$0.249	$0.250	$0.540	$0.681	$0.398	*-41.5%*	*10.9%*
Senses, Spaces, & Sleep	$0.193	$0.195	$0.191	$0.213	$0.253	$0.292	*15.6%*	*8.7%*
Self-Improvement	$0.011	$0.012	$0.015	$0.018	$0.021	$0.056	*170.9%*	*39.5%*
Meditation & Mindfulness	$0.005	$0.006	$0.008	$0.008	$0.009	$0.010	*10.3%*	*14.2%*
TOTAL	**$0.447**	**$0.462**	**$0.464**	**$0.779**	**$0.964**	**$0.757**	***-21.5%***	***11.1%***

** 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. See Appendix for detailed descriptions of the subsectors.
Source: Global Wellness Institute, based on data from Euromonitor, ICF, NCCIH, and other sources.

Traditional & Complementary Medicine

Figure 3.11: Traditional & Complementary Medicine Market by Subsector in Thailand, 2019-2024

	Market Size (US$ billions)						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
T&CM Services & Practitioners	$1.532	$1.419	$1.527	$1.536	$1.652	$1.819	*10.1%*	*3.5%*
T&CM Medicines & Products	$1.275	$1.230	$1.290	$1.665	$1.750	$1.413	*-19.3%*	*2.1%*
TOTAL	**$2.807**	**$2.648**	**$2.817**	**$3.201**	**$3.402**	**$3.232**	***-5.0%***	***2.9%***

** 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 data from Euromonitor, IBISWorld, and various national sources.

Public Health, Prevention, & Personalized Medicine

Figure 3.12: Public Health, Prevention, & Personalized Medicine Market by Subsector in Thailand, 2019-2024

	Market Size (US$ billions)						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
Public Health & Prevention	$1.567	$2.702	$3.233	$3.289	$2.901	$2.704	*-6.8%*	*11.5%*
Personalized Medicine	$0.187	$0.187	$0.221	$0.257	$0.268	$0.272	*1.5%*	*7.8%*
TOTAL	**$1.754**	**$2.889**	**$3.454**	**$3.546**	**$3.169**	**$2.975**	***-6.1%***	***11.1%***

** 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 data from the WHO, OECD, Grand View Research, and other sources.

Wellness Tourism

Figure 3.13: Domestic and Inbound Wellness Tourism Trips and Expenditures in Thailand, 2019-2024

	Domestic and Inbound Wellness Trips						Average Expenditures Per Trip
	2019*	2020*	2021*	2022*	2023*	2024	2024
Domestic							
Domestic Wellness Trips (millions)	7.98	4.49	2.69	6.76	8.08	9.22	$366
Domestic Wellness Trip Expenditures (US$ billions)	$2.43	$1.28	$0.85	$2.02	$2.96	$3.37	
Inbound/International							
Inbound Wellness Trips (millions)	7.13	1.15	0.09	2.07	5.40	7.06	$1,513
Inbound Wellness Trip Expenditures (US$ billions)	$13.46	$2.86	$0.76	$3.60	$7.34	$10.68	
Total Wellness Tourism							
Total Wellness Trips (millions)	**15.11**	**5.65**	**2.79**	**8.83**	**13.48**	**16.28**	**$863**
Total Wellness Trip Expenditures (US$ billions)	**$15.89**	**$4.14**	**$1.62**	**$5.62**	**$10.31**	**$14.05**	

** 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.*
Note: These figures include both primary and secondary wellness tourism trips. Figures may not sum to total due to rounding. See Appendix for wellness tourism category descriptions and definitions.
Source: Global Wellness Institute, based on tourism data from Euromonitor.

Figure 3.14: Primary and Secondary Wellness Tourism Trips and Expenditures in Thailand, 2019-2024

	Primary and Secondary Wellness Trips						Average Expenditures Per Trip
	2019*	2020*	2021*	2022*	2023*	2024	2024
Primary							
Primary Wellness Trips (millions)	1.16	0.18	0.10	0.45	0.85	1.04	$1,710
Primary Wellness Trip Expenditures (US$ billions)	$2.44	$0.34	$0.17	$0.68	$1.29	$1.78	
Secondary							
Secondary Wellness Trips (millions)	13.94	5.47	2.69	8.38	12.63	15.24	$568
Secondary Wellness Trip Expenditures (US$ billions)	$13.45	$3.79	$1.45	$4.94	$9.02	$12.28	

** 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.*
Note: These figures combine both inbound/international and domestic wellness tourism trips. Figures may not sum to total due to rounding. See Appendix for wellness tourism category descriptions and definitions.
Source: Global Wellness Institute, based on tourism data from Euromonitor.

Spas

Figure 3.15: Spa Revenues by Type in Thailand, 2019-2024

	Spa Revenues (US$ billions)						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
Hotel/Resort Spas	$1.136	$0.742	$0.792	$1.017	$1.117	$1.343	*20.2%*	*3.4%*
Destination Spas & Health Resorts	$0.290	$0.201	$0.206	$0.266	$0.285	$0.344	*20.6%*	*3.5%*
Other Spas	$0.124	$0.068	$0.071	$0.092	$0.097	$0.097	*0.2%*	*-4.8%*
Day/Club/Salon Spas	$0.092	$0.050	$0.051	$0.066	$0.070	$0.070	*0.1%*	*-5.3%*
Medical Spas	$0.012	$0.010	$0.012	$0.017	$0.021	$0.023	*11.7%*	*13.8%*
Thermal/Mineral Springs Spas	$0.003	$0.002	$0.002	$0.002	$0.003	$0.003	*4.0%*	*2.1%*
TOTAL	**$1.656**	**$1.073**	**$1.134**	**$1.461**	**$1.593**	**$1.880**	***18.0%***	***2.6%***

** 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. See Appendix for descriptions of the spa categories.
Source: Global Wellness Institute.

Figure 3.16: Spa Establishments by Type in Thailand, 2019-2024

	Number of Spa Establishments						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
Hotel/Resort Spas**	1,484	1,484	1,543	1,567	1,635	1,689	*3.3%*	*2.6%*
Destination Spas & Health Resorts	49	52	52	53	54	56	*3.7%*	*2.7%*
Other Spas	949	801	803	806	809	810	*0.1%*	*-3.1%*
Day/Club/Salon Spas	351	297	290	291	292	292	*0.0%*	*-3.7%*
Medical Spas	23	29	34	37	43	48	*11.6%*	*15.9%*
Thermal/Mineral Springs Spas	30	30	30	31	31	31	*0.0%*	*0.7%*
TOTAL	**2,886**	**2,693**	**2,752**	**2,785**	**2,864**	**2,926**	***2.2%***	***0.3%***

** 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.*
*** The number of hotel/resort spas stayed the same in 2019 and 2020 because we have no basis for determining whether there were any permanent closures in 2020, amidst all of the pandemic-related business disruptions and temporary shutdowns.*
Note: See Appendix for descriptions of the spa categories.
Source: Global Wellness Institute.

Thermal/Mineral Springs

Figure 3.17: Thermal/Mineral Springs Establishments and Revenues in Thailand, 2019-2024

	Thermal/Mineral Springs Commercial Establishments						Average Annual Growth Rate	
	2019*	2020*	2021*	2022*	2023*	2024	2023-2024	2019-2024
Thermal/Mineral Springs Establishments	92	92	93	94	94	94	*0.0%*	*0.4%*
Thermal/Mineral Springs Revenues (US$ billions)	**$0.020**	**$0.013**	**$0.015**	**$0.019**	**$0.022**	**$0.022**	***4.0%***	***2.0%***

** 2019-2023 figures have been revised since GWI released the previous version of the Global Wellness Economy Monitor.*
See Appendix for detailed thermal/mineral springs definitions and descriptions.
Source: Global Wellness Institute.

Appendix: Wellness Economy Definitions

1. The Wellness Economy and Its Eleven Sectors

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

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

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

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

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

1. Vitamins and dietary supplements (including herbal/traditional products) and sports nutrition products.
2. 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).
3. 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/diary/meat (e.g., plant-based alternatives, meat substitutes); products marketed as "naturally healthy" (e.g., high fiber, fermented, nuts/seeds); and organic products.

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

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

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

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

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

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

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

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

2. Physical Activity

Recreational Physical Activities

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

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

- **Participation in recreational physical activities:** The estimated percent of the population that participates in each category of recreational physical activity. In our dataset, "participation" is generally defined as doing the activity at least once a month or with some regularity. The participation estimates are agnostic of *where or how* people perform the activity. For example, people who do yoga may take a class at a specialized yoga studio, may take a class at a gym or YMCA, may use a streaming or on-demand class, or may simply practice yoga alone at home. For our estimates, all of these methods would count as "participation in yoga" if they are done with regularity.

- **Consumer spending on recreational physical activities:** The estimated direct, out-of-pocket expenditures by consumers each year in order to participate in each category of recreational physical activity. This figure is limited to expenditures on services for actually doing an activity—i.e., gym or studio memberships, fees for classes and training, sports team or club dues, entry fees for events/competitions/tournaments, and other associated services. Non-service expenditures are measured in separate, supporting categories (as described below). In some instances, fees may be subsidized (such as in facilities/programs run by nonprofits or local governments), and in these instances the study still counts consumer *participation* in the activity although out-of-pocket expenditures would be reduced or possibly zero. Likewise, for some activities there is no service provider or participation fee (for example, running in the park or playing a pickup basketball game with friends), and in these instances the study counts consumer *participation* in the activity although the expenditures are zero.

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

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

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

Physical Activity Enabling Sectors

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

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

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

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

3. Mental Wellness

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

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

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

Brain-boosting nutraceuticals & botanicals: Includes products that we ingest or put into our bodies with the specific aim of improving our mental health and well-being. Many over-the-counter natural supplements, herbals and botanicals, and traditional remedies specifically claim to support better sleep, brain health, memory, energy, and overall mental wellness. A wide range of functional foods and beverages claim to have brain health benefits, across nearly every packaged food and beverage category. There is growing interest in the potential of cannabis and its derivatives, psilocybin, and other plant-based and synthetic psychedelic drugs for both mental wellness and treatment purposes. A growing number of supplements and functional foods and beverages incorporate cannabis, hemp, CBD, THC, and medicinal mushrooms. (Note that our figures include only the legal, over-the-counter cannabis and cannabis derivatives market.) Most of the expenditures in this category overlap with the *healthy eating, nutrition, & weight loss* and *traditional & complementary medicine* sectors, and we account for this overlap when aggregating the figures for the overall wellness economy.

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

4. Wellness Tourism

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

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

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

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

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

5. Spas

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

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

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

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

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

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

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

6. Thermal/Mineral Springs

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

Types of Thermal/Mineral Springs Establishments

<table>
<tr><th>Primarily Recreational</th><th>Primarily Wellness</th><th>Primarily Therapeutic or Curative</th></tr>
<tr><td>Thermal/mineral water swimming pool facilities</td><td>Thermal/mineral water bathing facilities</td><td rowspan="2">Health resorts and sanatoria that use thermal/mineral waters for treatments</td></tr>
<tr><td>Thermal/mineral water-based waterparks</td><td>Thermal/mineral water-based spas</td></tr>
<tr><td>Hotels/resorts with thermal/mineral water swimming pools</td><td colspan="2">Thalassotherapy spas and resorts</td></tr>
<tr><td colspan="2">Thermal or hot springs resorts</td><td></td></tr>
</table>

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

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

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

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

BDMS WELLNESS CLINIC

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

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