PL190595

Local Planning Appeal Tribunal

PROCEEDING COMMENCED UNDER subsection 17(36) of the *Planning Act*, R.S.O. 1990, c. P.13, as amended

WITNESS STATEMENT OF ANDREW GIBSON

Proposed Freymond Quarry
Township of Faraday
County of Hastings

Prepared for
No Place For A Quarry Inc.

May 17, 2021

QUALIFICATIONS

1. I will be requesting that I be qualified to provide the Tribunal with opinion evidence in areas related to the Global Wellbeing Industry and Wellbeing-Wellness Tourism. I have attached a copy of my CV and Acknowledgment of Expert Duty.

RETAINER

2. I was retained on April 12, 2021, on behalf of No Place for a Quarry Inc. to provide evidence in this matter.

EVIDENCE

Grail Springs Retreat Centre for Wellbeing

3. Grail Springs is a nature-based Canadian wellness retreat centre established in 1993. It is dedicated to the wellbeing of people, animals and the planet. Created by its founder and CEO Madeleine Marentette who holds an uncompromising vision, this multiple award-winning Canadian Centre continues to be an incubator to educate, test and implement holistic wellness solutions and modalities in to wellness tourism products and programs. Modalities embody technology to support cellular biology and the wisdom of ancient healing arts. Grail Springs was the first holistic wellness retreat to establish itself in Canada and the first to be recognized in Canada by the Healing Hotels of the World. Grail Springs Retreat Centre for Wellbeing has operated quietly and successfully as a trusted sanctuary serving wellness focused travellers world-wide.

Grail Springs Highlights:

- Main building 20,000 square feet plus out buildings, onsite laundry facility, stable
- 35 acre spring-fed lake

- 350 feet shoreline
- 98 acres combined properties Part Lot 46 & 47 Faraday Township
- More than 7 kilometres trail systems
- Two permanent innkeepers homes
- 13 fully appointed guest rooms with walk-out balconies
- 32 seat dining room and patio
- 11 treatment rooms, 2 coaching/consultation rooms
- Indoor yoga and meditation studio
- Outdoor hot/cold thermal circuit
- Outdoor yoga & meditation deck
- Outdoor healing installations: labyrinth/prayer trees/medicine wheel/volcanic ash healing bed, crystal crop meditation area - quartz deposits
- Retail boutique
- Hand-crafted private label eco-friendly spa line
- Men and women's locker rooms with showers for day guests
- Great Hall lounge and lecture area

Evidence-based Wellness Modalities Offered at Grail Springs: The Global Wellness Institute provides direct access to members, current medical evidence for mainstream wellness approaches by providing thousands of clinical studies evaluating the effectiveness of holistic approaches to wellness modalities. Modalities implemented and practiced at Grail Springs for almost three decades are as follows and not exclusive to:

- Meditation
- Yoga
- Exercise
- Tai Chi
- Bio-Feedback Technology
- Equine Therapy
- Forest Bathing
- Balneotherapy
- Salt Therapy
- Light Therapy
- Crystal Therapy
- Hydrotherapy
- Sauna Therapy
- Massage
- Music Therapy
- Relaxation Therapy
- Aromatherapy
- Dream Therapy
- Art and Experiential Therapy
- Sleep Health & Technology
- Hypnosis Therapy

- Stress Management
- Energy Management
- Workplace Wellness

Daily Classes Indoor & Outdoor not exclusive to:

4. In my evidence I will also refer to and rely on the following materials:

    I. Sample Grail Springs Daily Class Schedule

Associations and Accolades:

- 2010 First Property in Canada certified by the Healing Hotels of the World, head office Cologne, Germany
- Five-time recipient ‘Canada’s Best Wellness Retreat’ - World Travel Spa Awards 2016, 2017, 2018, 2019, 2020
- Nominated 2021 Canada’s Best Wellness Retreat ~ World Travel Spa Award
- Canadian Parliament House of Commons, twice recognized for contribution to tourism and events promoting women in business, women’s rights, women’s mental and physical wellbeing
- Recipient SpaFinder Award ~ presented by Mariel Hemingway
- Trailblazer Award Nomination Hasting County
- Recipient Festival of the Year Award, Hastings County
- Wellness Tourism Association, Madeleine Marentette Co-founder
- Madeleine Marentette served on the United Nations Millennial Goal Awards Committee
- Member Global Wellness Institute since 2014
- Global Wellness Summit Attendee Austria, USA, Italy
- Healing Hotels of the World Summit – panelist
- Grail Springs Holistic Detox for Body, Mind & Spirit – Canadian Best Selling Book
- Grail Springs launched the first ever in Canada – ‘Winter Spa Fest’ in 2019 for February and March driving record-breaking winter occupancy levels to 90%.
- Madeleine Marentette nominated “Women of Influence” by the Royal Bank of Canada, Canadian Entrepreneur Award April 2021
- Economic Club of Canada has recently hired Madeleine Marentette as a wellness consultant for an exciting wellness tourism development opportunity, supporting a traditional indigenous healing lodge and wellness retreat centre which will be built on 55 acres on the Six Nations of Grand River Indigenous Reserve.

5. In my evidence I will also refer to an rely on the following materials:

II. Slide Presentation of Grail Springs Retreat Centre for Wellbeing
III. Reference letter from President of the Economics Club of Canada
IV. Site map – location of Grail Springs operation and proposed quarry operation

Who Grail Springs Serves

Pre-covid: Serving 3000+ visitors annually; 80% provincial, 15% national, 5% international (mainly US). The overflow spills into local businesses, cafes, art galleries, gift shops.

Demographic: 85% female, 15% male, corporate, entrepreneur, proactive in personal wellness

Who Grail Springs Employs

Employment upwards of 35 to 40 positions held at Grail Springs - 80% of the career jobs created at Grail Springs are held by women – both at entry level training and specialized skills. Meaningful and above average paying careers for women in rural regions of Ontario in the private sector, with benefits, that are in the non-resource, non-hydro and non-government sectors are very hard to come by. These are quality year-round jobs come with no winter layoffs (highly unusual in the Canadian tourism sector), contributing millions to the local economy throughout the year. Sustainable wellness-focused careers paying upwards of $25 to $100 per hour for special skills such as plant-based chefs, spa therapists, life coaches, yoga instructors and workshop facilitators.

Grail Springs has created and sustains upwards of 40 positions year-round - 80% held by women - both at entry level and specialized skills with zero winter layoffs (highly unusual in the Canadian Tourism sector) and contributing millions of dollars to the local economy year-round.

Grail Springs Purpose

Humans require and seek in their lives, times and spaces for relaxation and stress-reducing experiences. Mental wellness, emotional wellness, physical and spiritual wellbeing for most, depends on those times and spaces. For almost 30 years, Grail Springs has successfully offered such opportunities and experiences. The need and demand for these services and facilities has continued to increase, and post COVID they are likely to significantly expand. The Global Wellness Institute research report dated November 2020 - *Defining the Mental Wellness Economy*, focuses on four main pathways to Mental Wellness: Activity & Creativity, Growth & Nourishment, Rest & Rejuvenation, Connection & Meaning and four opportunities for the industry: Self-Improvement, Meditation & Mindfulness, Brain-Boosting Nutraceuticals & Botanicals, and Senses, Spaces and Sleep. Grail Springs presently with its existing programming already meets three of the four of the mental wellness pathways.

6. In my evidence I will also refer to and rely on the following materials:

V. Global Wellness Institute - Mental Wellness Research

VI. Global Wellness Institute – Build Well Report

Effects of Noise

For most humans, relaxation and stress-reduction is often achieved in quiet or silence. In day-to-day life one is accustomed to ambient noise from other human activity, traffic, construction, etc. A wellness centre has to be quiet and free from distractions to meditate, to relax, to rejuvenate and to heal. Grail Springs Retreat Centre for Wellbeing is a world class, award-winning destination. Guests travel locally, regionally, nationally and internationally seeking rejuvenation through wellness and wellbeing experiences. The absence of noise is a key requirement for such an establishment and its activities.

An award-winning retreat centre goes through a myriad of stringent checks and must meet many requirements in order to achieve this status. These include providing a suitable environment, including freedom from noise. A quarry with blasting, drilling and crushing within 1km of Grail Springs Retreat Centre for Wellbeing will create significant noise pollution. This will significantly alter the environment that Grail Springs has operated within for close to three decades. It will undermine or remove Grail Springs from consideration of many of the awards systems and other programs Grail Springs is currently recognized within.

As with many other tourism-based and other types of service industries, client feedback is also widely available and has a major impact on the success, and even the viability of entities offering services to the public. Trip Advisor and similar powerful on-line review platforms are beyond the control of the operator. Property operators are able to listen, discern, respond, solve and improve the quality of their product and experiences in most cases. However a quarry and the noise coming from such will not be mitigatable by Grail Springs operators. In a short space of time, a very limited number of critical reviews can be viewed globally and have the immediate effect of severely compromising and/or ruining the business. It must be emphasized that even the perception of noise, air, water or natural beauty pollution will have a disastrous effect on reservations. One or two negative Trip Advisor comments themed around this topic could end business for Grail Springs and turn prospective customers towards competitive locations.

Economics

Grail Springs has proven to be a sustainable contributor to the local economy for many years. In addition to service employment opportunities, the centre provides employment year-round employment to individuals (predominantly women) with specialized skills, earning higher wages such as spa therapists, RMT's, life coaches, yoga instructors, outdoor activity instructors, workshops facilitators and chefs. The impact to the local economy is clearly significant and beneficial.

At the Provincial level, according to Statistics Canada, the direct contribution of tourism to Ontario GDP in 2017 was 35.5%.

According to Statistics Canada, the direct contribution of tourism to the Canadian GDP in 2017 was 37.4%. Tourism is a dominant industry in Canada including job market. Based on some of the more recent statistics available pre-COVID, tourism created 750,000 jobs in Canada from January to September 2018. Tourism is vital and growing with domestic travel increasing. Globally, the businesses of wellness and wellbeing are dramatically expanding. In the Global Wellness Institute research paper entitled *Wellness Lifestyle Real Estate* dated October 2018, it concludes that wellness sectors are no longer siloed industries. They will increasingly converge as we integrate wellness into our homes and communities, our work, and our travel.

7. In my evidence I will also refer to and rely on the following materials:

VII. Global Wellness Institute – Global Wellness Tourism Economy Report

VIII. Global Wellness Institute – Wellness Economy Monitor

IX. Global Wellness Institute – Wellness Lifestyle Real Estate

If the message is sent that Grail Springs cannot or should not be protected, this sends a message to every operator worldwide that Ontario, and indeed perhaps Canada, no longer appears to be a viable marketplace for wellness and well-being economic development.

Our world is filled with many beautiful spaces, and competition in other jurisdictions for facilities such as Grail Springs and all of the benefits they bring, is high. However, no reasonable investor is likely to expend the considerable resources required to develop such a facility, only to find the various levels of government within that jurisdiction are unable to protect their viability.

Conclusion

In conclusion, the role of global wellness in society is becoming more and more vital as the need for quiet peaceful retreats post-COVID and the demand for mental wellness and emotion, physical and spiritual wellbeing increase. Grails Springs Retreat Centre for Wellbeing plays a significant role in fulfilling this demand, and has a significant economic impact, driven by a diverse and committed workforce, the majority of whom are women. It is also a key determinant for the future of such facilities in its area, in the province of Ontario and Canada. The proposed quarry is incompatible with the success, and with survival, of Grail Springs Retreat Center for Wellbeing, and the proposal should not be approved.

Andrew Gibson

May 17 2021

APPENDIX A

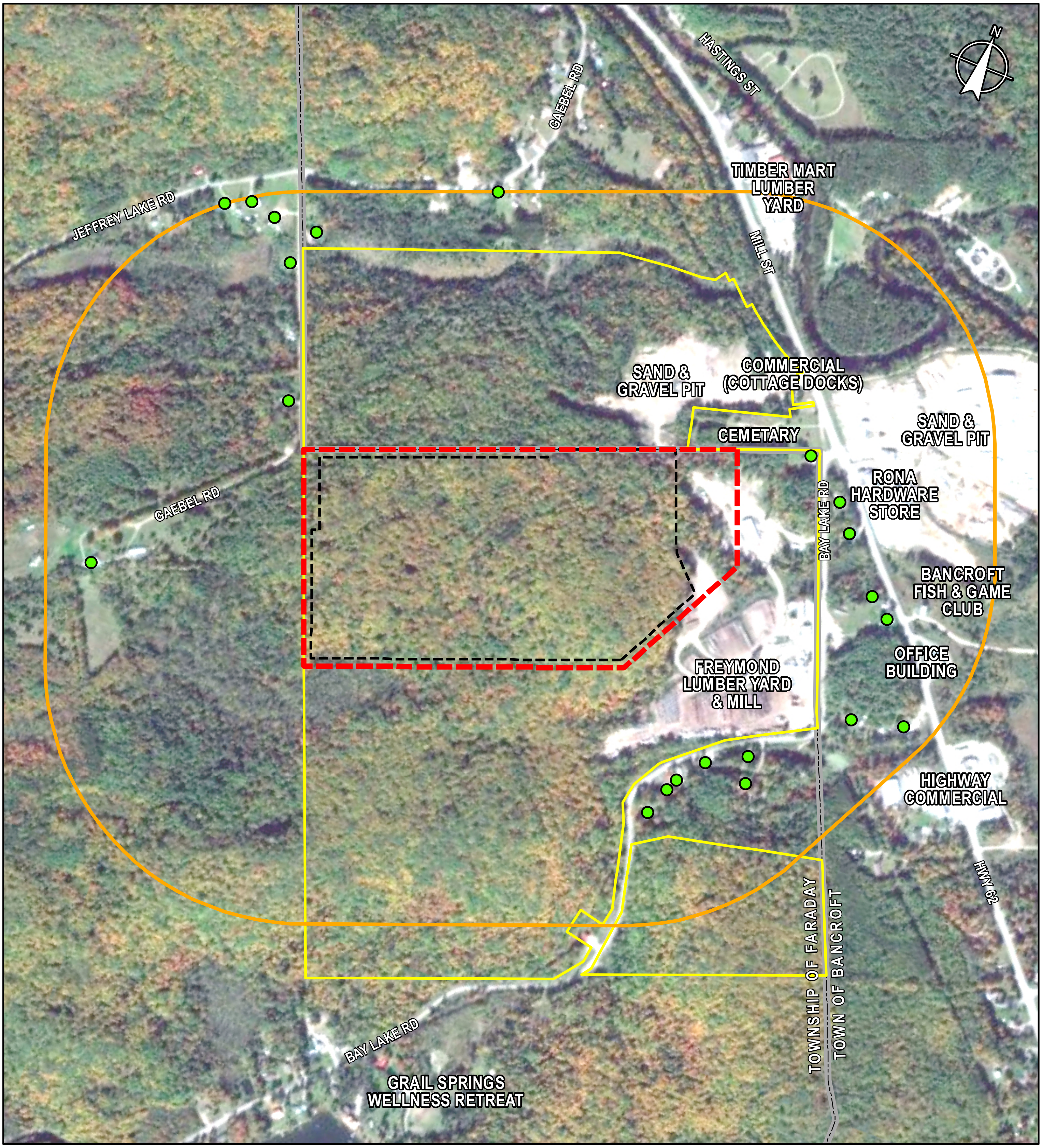

FIGURE 3

SITE ENVIRONS & SURROUNDING LAND USES

Freymond Quarry

RR#1, 2287 Bay Lake Road
Township of Faraday
County of Hastings

LEGEND

- Residential Buildings
- Proposed Licensed Boundary
- Proposed Extraction Limit
- 500m Boundary from License Area
- Additional Lands Owned by Applicant

DATE December, 2016

SOURCES

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Metres

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MHBC PLANNING URBAN DESIGN & LANDSCAPE ARCHITECTURE

APPENDIX B

GLOBAL WELLNESS INSTITUTE™

EMPOWERING WELLNESS WORLDWIDE

think
function
connect
feel

NOVEMBER 2020

Defining the Mental Wellness Economy

Defining the Mental Wellness Economy

November 2020

Contents

Appendices

List of Figures

About the Authors

About the Global Wellness Institute

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

www.globalwellnessinstitute.org

About the Authors

Defining the Mental Wellness Economy was co-authored by Ophelia Yeung and Katherine Johnston, Senior Research Fellows at the Global Wellness Institute. Together, they have four decades of experience leading research and strategy development for businesses, governments, and nonprofits worldwide. Since 2008, Ms. Yeung and Ms. Johnston have pioneered groundbreaking research and co-authored numerous studies that define and measure the global wellness economy and its subsectors, under the auspices of the Global Wellness Institute. Tonia Callender, GWI Research Fellow, contributed significant research in industry and regional developments and data for this study.

Defining the Mental Wellness Economy

Executive Summary

NOVEMBER 2020

Executive Summary

Mental wellness can offer a path forward in a world suffering from a mental health and well-being crisis.

Our mental unwellness has been a growing public health crisis for some time. Over 15% of the global population suffers from mental and substance use disorders.[1] Dementia is on the rise; happiness is on the decline in many countries; and stress, worry, sadness, burnout, and loneliness are increasing all around the world.[2] In 2020, COVID-19 has accelerated the deterioration of our collective mental health and well-being. The pandemic has exposed the wide gap between mental health needs and mental health resources, as well as our vulnerability to mental distress even when we do not have a diagnosed mental illness.[3]

In this dire landscape, mental wellness offers a path forward to help meet widespread needs and increase well-being for all. In fact, a big shift toward mental wellness is just beginning: as a personal pathway toward higher levels of well-being, as a public health and community strategy, and as a business and investment opportunity. Practitioners and consumers have been leading the way, with a vibrant private sector creating new solutions, services, and products to help people build resilience and improve their mental wellness. Yet, the understanding of mental wellness is often fuzzy, and to date there has been no definition or quantification of this burgeoning mental wellness marketplace.

> This study will offer a definition for mental wellness; clarify concepts and outline pathways; define mental wellness as an industry for the first time and delineate its segments; and estimate the size of the global mental wellness economy.

What is mental wellness?

Figure A

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.

Mental wellness is a **resource** because it is dynamic, renewable, and positive.

Mental wellness is a **process** that we must engage in proactively, it is not a static state of being.

Mental wellness is not only "mental" but has **several dimensions:**

THINKING
Mental Dimension

CONNECTING
Social Dimension

FEELING
Emotional Dimension

FUNCTIONING
Psychological Dimension

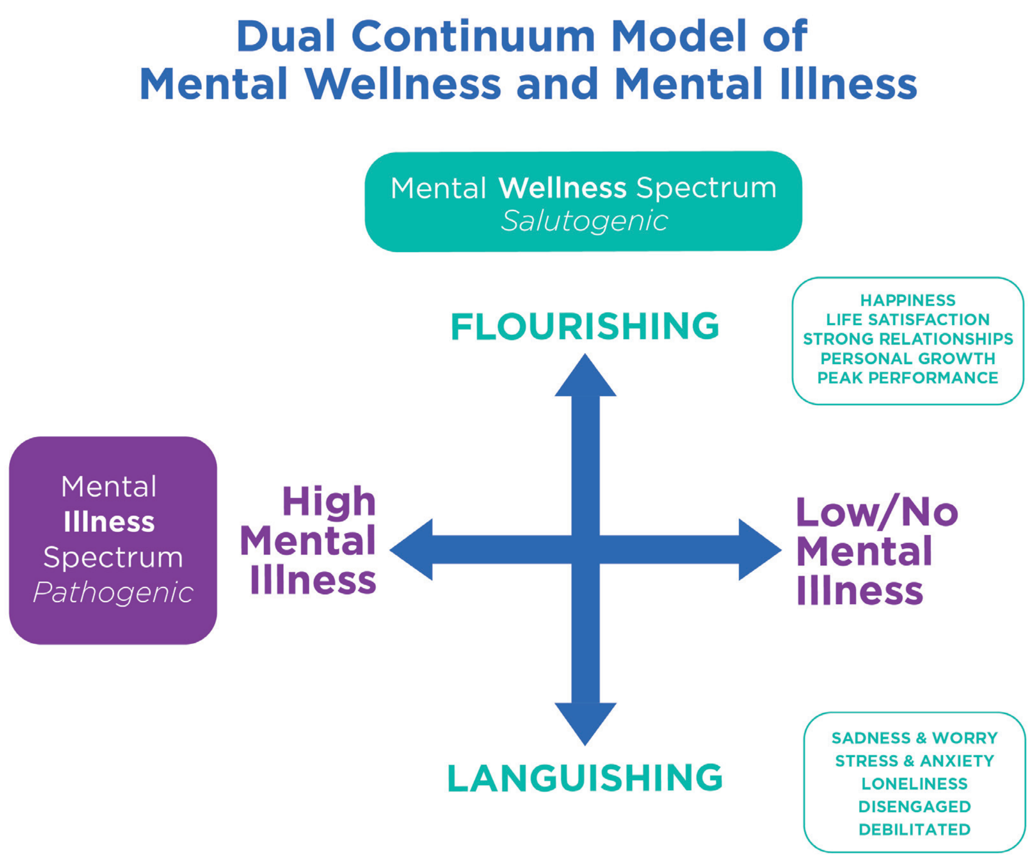
Source: Global Wellness Institute

Mental wellness is a dynamic, renewable, and positive **resource**; an active **process** that requires initiative and conscious action; and an internal experience that encompasses **multiple dimensions**: ***mental*** (how we process, understand, and use information); ***emotional*** (how we manage and express our feelings); ***social*** (how we connect with others); and ***psychological*** (how we function or "put the pieces together" to make decisions or do things). This definition distills the concepts included in many existing definitions (from the World Health Organization and others). It builds upon well-established theories from psychology and academic literature, and it frames them in a language that is more understandable to consumers, businesspeople, and policymakers.

Five things everyone should know about mental wellness.

1. Mental wellness is more than just the absence of mental illness. The complex relationship between mental illness and mental wellness is best understood by envisioning them sitting on two separate continuums (see *Figure B*). The horizontal axis measures mental illness from high to low, while the vertical axis measures mental wellness from languishing to flourishing.[4] About 85% of the world's population does not have a diagnosed mental illness, but these people are not all "mentally well" or thriving, because of pervasive stress, worry, loneliness, and other challenges. On the other hand, those who have a diagnosed mental disorder can still have moderate or positive mental wellness (e.g., having good relationships, feeling happy, or functioning well at a job). Practices that increase our mental wellness are increasingly recognized as protective factors for our mental health, as well as helping reduce the severity and symptoms of mental illness (alongside conventional treatment regimens).[5]

Figure B



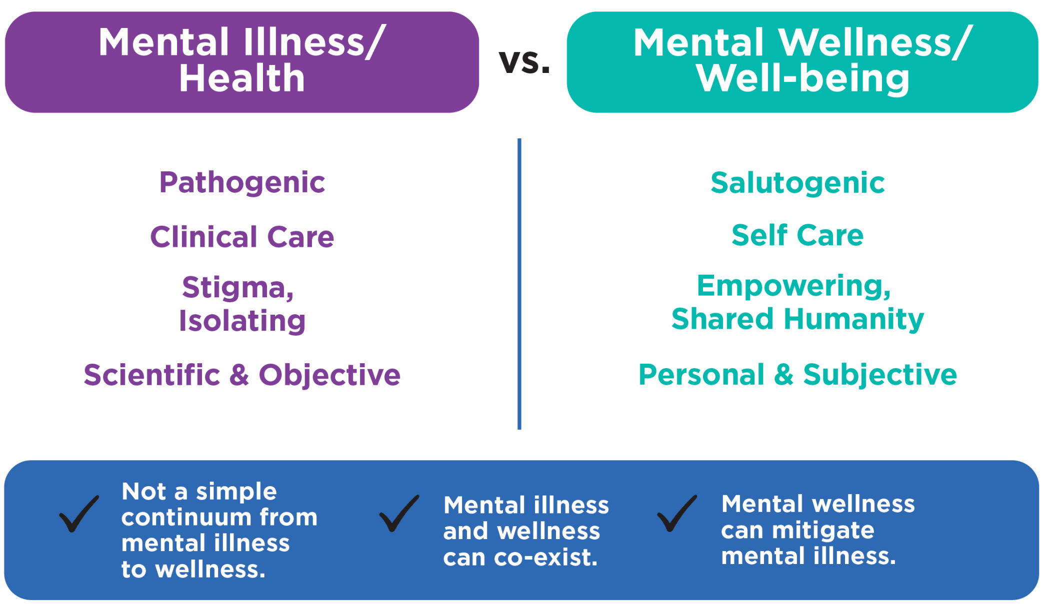
The dual continuum model was adapted by GWI from concepts developed by Keith Tudor (1996) and Corey L.M. Keyes (2002). Source: Global Wellness Institute

2. Mental wellness is an active process of moving from languishing, to resilience, to flourishing. On one level, mental wellness is about prevention; coping with life's adversity; and being resilient when we face stress, worry, loneliness, anger, and sadness. On another level, mental wellness moves us toward a deeper, richer, and more meaningful human experience, which is often described as flourishing. What it means to flourish is subjective and personal, and it is shaped by individual values, culture, religion, and beliefs. For one person it can mean functioning at the top of their game and achieving their life goals, while for another it might mean self-transcendence.

3. Mental wellness helps to shift the perspective away from stigma to shared humanity. Even though the mental health field has done a lot of work to mitigate the stigma surrounding mental illness, a sense of shame, denial, and secrecy continues to afflict people in communities and cultures around the world.[6] Mental wellness can help shift our focus toward a more positive and empowering approach (how we can feel, think, connect, and function better), rather than just avoiding or coping with illness. It emphasizes our capacity to build resilience; to reduce suffering; to find inner peace and joy; and to seek meaning, purpose, and connection – a universal longing shared by all people.

4. Mental wellness grows out of a grassroots, consumer-driven movement. People desperately need non-clinical, non-pathologizing strategies to cope with everyday mental and emotional challenges like stress, burnout, loneliness, and sadness. Evidence shows that improving our mental wellness can even reduce our risk of developing mental illness,[7] but not enough attention is paid globally to mental illness *prevention* and mental wellness *promotion*.[8] Consumers, practitioners, and businesses have led the charge in seeking self-directed, alternative solutions outside of the established fields of medicine, psychiatry, and psychology. They are bringing centuries-old natural and holistic mental wellness modalities into the mainstream, pushing science into areas where it has not gone before to consider the efficacy of ancient practices and emerging solutions.

Figure C



Source: Global Wellness Institute

5. Mental wellness is multi-dimensional, holistic, and personal. Mental wellness recognizes the integrated and holistic nature of our health and well-being. The state of our mind affects our body, and vice versa. Sometimes, when our circumstances change, we need to adopt new practices or strategies to handle stress, improve resilience, and deal with adversity. In this study, we segment the key strategies for mental wellness into four main pathways: **activity and creativity; growth and nourishment; rest and rejuvenation;** and **connection and meaning.** Each of these has mind-body and internal-external dimensions (see *Figure D*, and see the full report for a detailed description of each pathway). Together, they represent a menu of options for pursuing mental wellness; there is no set path, and people can choose the strategies and activities that are the most important or effective for them.

Personal agency or collective responsibility?

The notion that mental wellness is about individuality, self-care, and personal responsibility does not imply that it is solely an individual pursuit or that it is fully within our control. In fact, there is great inequity in our access to mental wellness pathways and modalities. Many people do not have easy access to healthy food, exercise facilities, or nature; many do not have the money to pursue certain mental wellness activities. In addition, external and macro-level circumstances are a major determinant of our mental wellness. People who suffer from systematic violence, discrimination, abuse, injustice, war, poverty, famine, and natural disasters suffer major blows to their mental wellness and have basic needs that must be addressed (safety, security, food, shelter, medical care, employment). But even in the most adverse circumstances, a growing body of evidence shows that individual mental wellness practices can reduce our stress and help us build greater resilience, clarity, and hopefulness.[9]

Mental wellness can help address the rising cost burden of mental illness and unwellness.

Mental illness and mental unwellness impose a massive economic and societal burden around the world. Beyond the economic costs – estimated to reach $16.1 trillion globally by 2030[10] – mental illness takes a staggering toll on individuals, families, and society in the form of homelessness, poor educational and health outcomes, unemployment, and higher rates of poverty.[11] Poor mental wellness can also be debilitating; it is more common than depression and is associated with emotional and psychosocial impairment comparable to that of a depressive episode.[12] Those who suffer from mental unwellness (even when free of a diagnosed mental illness) tend to do worse in terms of "physical health outcomes, healthcare utilization, missed days of work, and psychosocial functioning."[13]

Governments and businesses have an incentive to promote mental wellness because it can help address these rising costs. Practices that improve our mental wellness can not only lessen the symptoms of mental illness, but also reduce our risk of developing a mental illness.[14] Good mental wellness is linked with many other positive outcomes, including better physical health, longevity, social relationships, and work performance.[15]

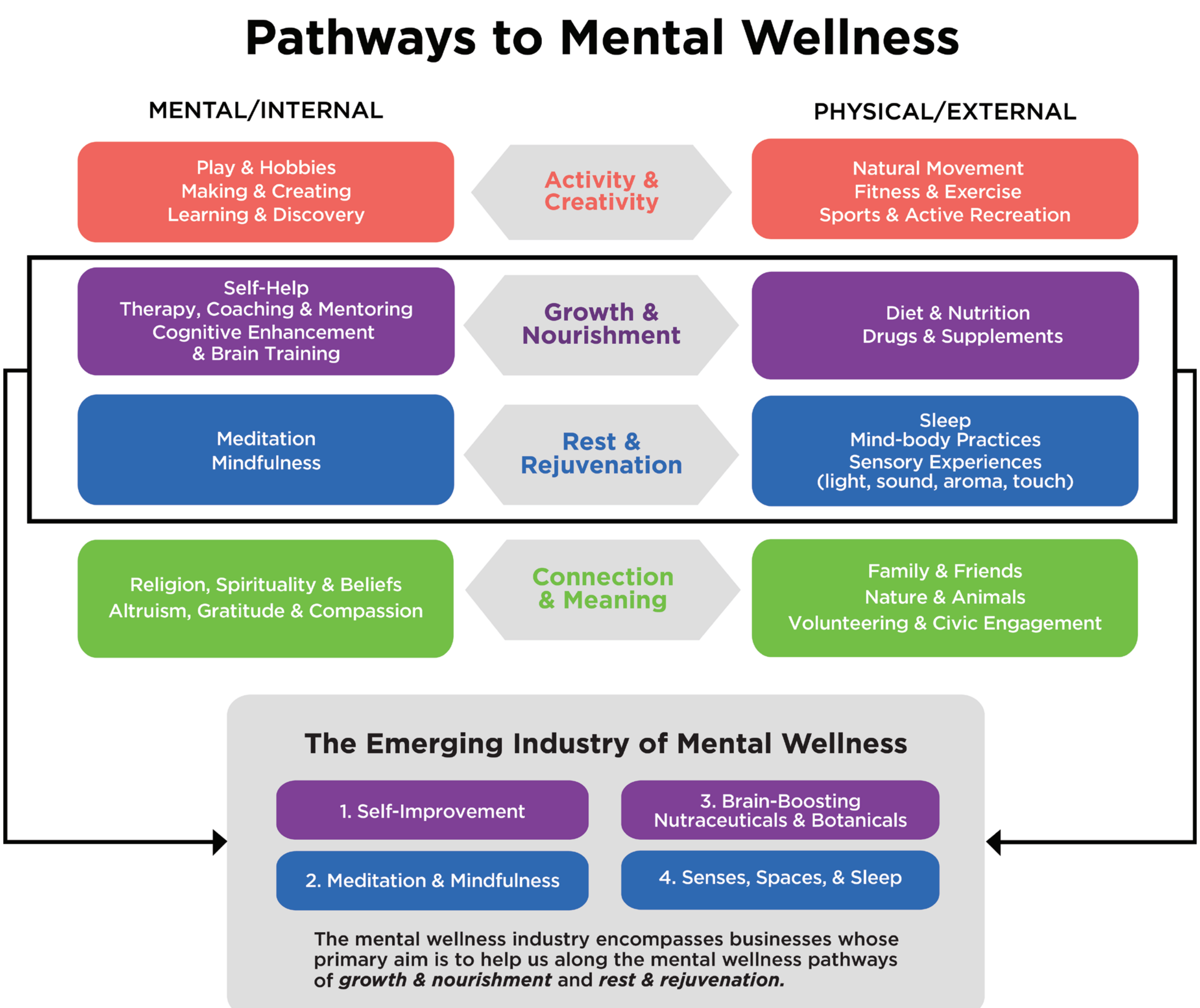
- Government policies (economic, healthcare, education, urban planning, parks and recreation, etc.) play a critical role in our mental wellness, because they shape our macro environments and our access to wellness-enhancing physical and built environments.
- Private businesses across many industries (hospitality, spas, technology, consumer goods, housewares, books and media, etc.) play a major role in developing new products and solutions; offering more choices to meet diverse needs at a variety of price points; leveraging technology; and attracting research and investments.

Defining the mental wellness economy.

The scope of mental wellness pathways and practices is wide-ranging. Mental wellness permeates the entire economy because every aspect of our daily lives can have a profound impact on our mental wellness. In this study, we focus more narrowly on the businesses that provide products, solutions, and experiences to consumers specifically for their mental wellness.

To delineate the mental wellness industry, we focus on two pathways: **growth and nourishment** and **rest and rejuvenation**. We do not include **activity and creativity** in the industry because the category is too broad (fitness, sports, learning, hobbies), and it already sits solidly in other industries; we also exclude **connection and meaning** because these activities are primarily non-commercial (religion, gratitude, altruism, friends, nature, civic engagement). Specifically, four sectors are coalescing into an emerging mental wellness industry: 1) **self-improvement;** 2) **meditation and mindfulness;** 3) **brain-boosting nutraceuticals and botanicals;** and 4) **senses, spaces, and sleep** (see *Figure D*).

Figure D



Source: Global Wellness Institute

The four mental wellness industry subsectors are defined below. These subsectors – including their detailed definitions, historical evolution, and current developments – are described in *Chapters IV* and *V* of the full report.

1. 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.

2. 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.

3. 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.)

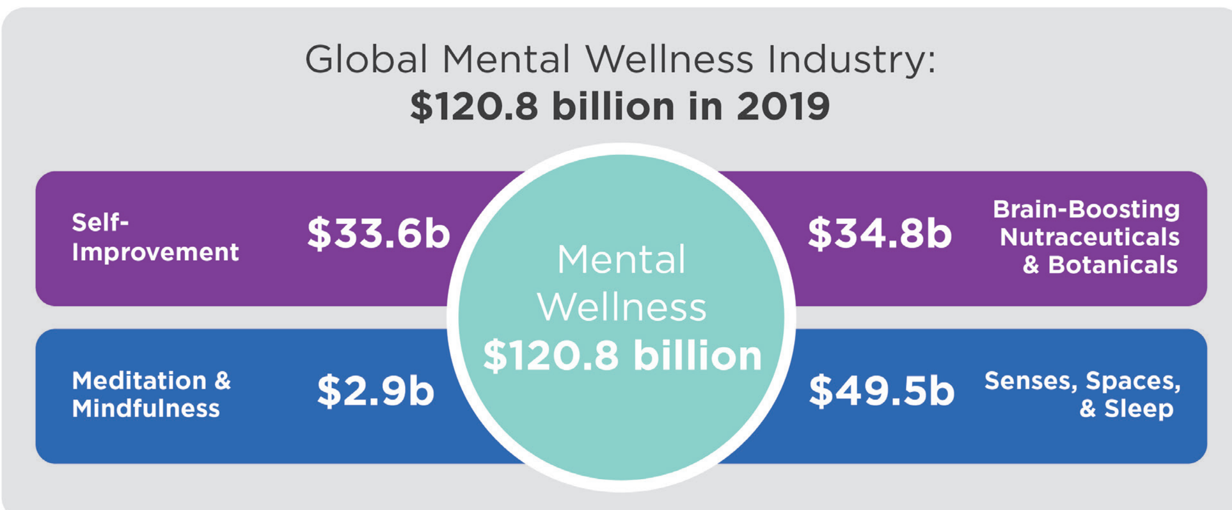
4. Senses, spaces, & sleep includes products, services, and design that target our senses and the mind-body connection, based upon the growing understanding that environmental stimuli have a major impact on our mood, stress levels, sleep, and mental health and well-being. This broad sector encompasses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

Mental wellness is a $121 billion global market.

We estimate that the global mental wellness industry was worth $120.8 billion in 2019 (see *Figure E*). This estimate represents consumer expenditures on the four subsectors that we identified and described above, and it focuses on proactive, wellness-focused, consumer- and private sector-driven activities (that is, things outside of the psychiatry, psychology, and clinical/medical spheres). These figures are broad, global estimates that we aggregated based on a wide range of secondary data sources.[16]

Senses, spaces, & sleep is the largest subsector (at $49.5 billion), followed by *brain-boosting nutraceuticals & botanicals* ($34.8 billion) and *self-improvement* ($33.6 billion), which are similar in size (see *Figure E*). *Meditation & mindfulness* is the smallest subsector, at $2.9 billion; it is important to keep in mind that millions of people around the world practice meditation, but only a small fraction of them spend any money on the practice. The historical context, evolution, and current developments in these subsectors are discussed in *Chapter V* of the full report.

Figure E



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

How to interpret these numbers.

What does a 2019 market size estimate mean, given the global upheaval unleashed by COVID-19 in 2020? The mental wellness industry figures presented above can serve as a 2019 baseline on which to anticipate the future. Clearly, the human suffering and economic dislocations caused by the pandemic have negatively impacted our mental health and well-being, and therefore have increased demand for mental wellness pathways and solutions on a global scale. Companies in some segments – such as those delivering virtual solutions, home entertainment, and vitamins and supplements – have reported an upswing in demand during the pandemic. However, since disposable income and consumer confidence have taken a severe hit worldwide, consumer spending is shrinking across many industries.[17] The pandemic has also accelerated the global trend of polarization and concentration of income and wealth. Therefore, future opportunities will depend upon how a business provides value to its targeted consumer segment, such as luxury versus mass market. Some businesses may also face increasing competition from mental wellness activities that people have learned to do on their own, or free/affordable amenities and services provided by governments, communities, and nonprofits.

This is the first time a global mental wellness industry has been defined. However, the boundaries across the four mental wellness subsectors above are not clearly delineated. For example, a mindfulness workshop or retreat would fit into the *meditation & mindfulness* subsector, while a life coach could also provide guidance on mindfulness practices (which fits in the *self-improvement* subsector). Sound healing and aromatherapy products (e.g., gongs, chimes, incense, candles) fit in the *senses, spaces, & sleep* subsector, but are also often used as accessories for *meditation & mindfulness*.

By singling out four subsectors, we are not implying that these are the most important or most effective practices for pursuing mental wellness. They are simply the practices that are most closely and proactively identified by businesses and consumers as being related to mental wellness. There are many things we can and should do to support our mental wellness that are not a business opportunity and do not require spending money (like spending time in nature, joining a spiritual community, or listening to music).

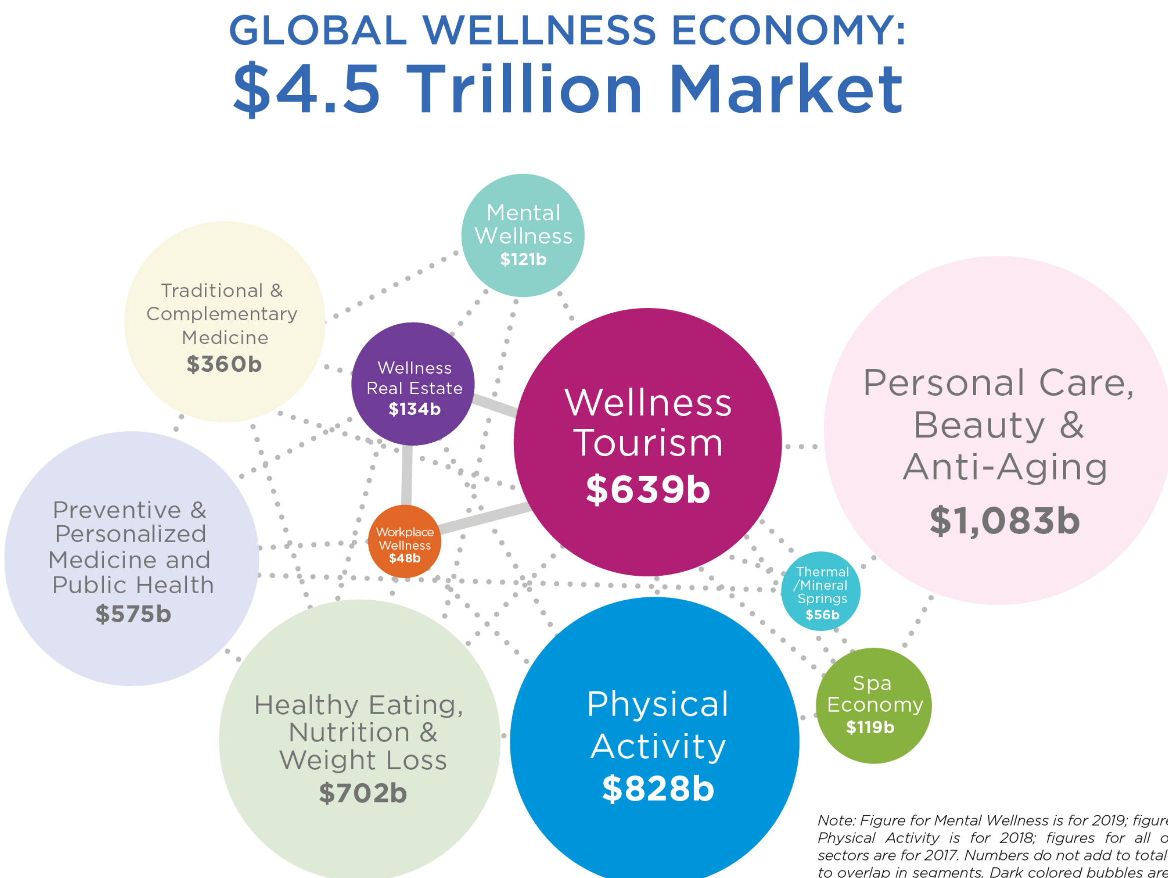
As an emerging sector, many mental wellness practices and products have not yet accumulated extensive clinical evidence when compared to the conventional medical and mental health industries (e.g., drugs that treat mental disorders). The regulation of most mental wellness businesses is fragmented, and it is generally left to consumers to determine whether they believe in and find benefit from them or not. However, a body of evidence is quickly growing – especially for some modalities, like meditation, light therapy, and circadian science – bolstered by an acceleration of public and private research investments. Meanwhile, consumers also need to be educated on the importance of basic healthy habits (exercise, healthy eating, human connections) for their mental health and well-being.

Technology is not a standalone segment within the mental wellness industry, but is pervasive across all subsectors (as described in detail in *Chapter V* of the full report). Mental health and mental wellness tech startups have become a major target for investors, receiving massive amounts of funding. Investment levels reached $750 million in 2019, a five-fold increase over 2014, while funding has topped $1 billion in the first half of 2020.[18] These figures indicate that the perceived growth potential of this segment is huge. An important development is the merging of traditional mental health solutions with mental wellness technology platforms to provide preventive and supplemental care, and some businesses may be seeking to access the resources of a much larger healthcare market, beyond consumer discretionary spending on mental wellness.[19] Finally, these investment figures reflect flows of startup capital and are not included in our market size figures for 2019 (which measure consumer expenditures).

Mental wellness is a new "industry bubble" within the Global Wellness Economy framework.

The *Global Wellness Economy Monitor*, first published by the Global Wellness Institute (GWI) in 2014, defines and measures the size of the wellness economy worldwide. **The wellness economy encompasses industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives.** To date, the wellness economy has included ten industries, which we estimated at $4.5 trillion in 2017/2018.[20] With a growing share of consumers embracing wellness as a dominant lifestyle value, the wellness economy has become ever more dynamic and pervasive in all aspects of our lives. Emerging consumer needs drive business and technology innovations and create new sectors, and mental wellness is just a such a sector. **In defining and measuring mental wellness as an industry for the first time, we are adding an 11th industry sector within the wellness economy** (see *Figure F*). This is a significant addition to our framework, capturing an important set of economic activities that were not previously included in our wellness economy measurements.

Figure F



Note: Figure for Mental Wellness is for 2019; figure for Physical Activity is for 2018; figures for all other sectors are for 2017. Numbers do not add to total due to overlap in segments. Dark colored bubbles are the sectors for which GWI conducts in-depth, country-level primary research. Light colored bubbles are sectors for which GWI aggregates global estimates only, drawing from secondary sources.

Source: Global Wellness Institute

As mentioned earlier, the COVID-19 pandemic has brought unprecedented challenges to the whole world, affecting every aspect of human welfare, our society, and the global economy. It is crucial to examine how the wellness economy has evolved since we last published figures for 2017/2018. An update of the global wellness economy will be the subject for GWI's upcoming research study in 2021.

Endnotes

[1] Authors' analysis of data from the *Global Burden of Disease Study 2019*, downloaded from: Institute for Health Metrics and Evaluation, *Global Health Data Exchange*, http://ghdx.healthdata.org/, accessed October 16, 2020. In this dataset, "mental disorders" include schizophrenia, depressive disorders, bipolar, anxiety disorders, eating disorders, autism spectrum disorders, attention-deficit/hyperactivity disorder, conduct disorder, idiopathic developmental intellectual disability, and other mental disorders; "substance use disorders" include alcohol use and drug use disorders.

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Defining the Mental Wellness Economy

Full Report

NOVEMBER 2020

I. Mental Wellness Takes Center Stage

Our mental unwellness is a public health crisis.

If health is the new wealth, then mental wellness sits at the core of our personal health portfolio. And yet, collectively, our mental health and well-being are in crisis. Over 15% of the world's population (approximately 1.1 billion people) suffered from **mental and substance use disorders** in 2019.[1] The prevalence of mental illness is even higher (22%) in countries with conflict and violence,[2] and the poor are disproportionately affected by these disorders.[3] Depression is a leading cause of illness and disability, affecting nearly 280 million people worldwide. More than 108 million abuse alcohol, and over 750,000 people die from suicide each year.[4] Since mental disorders are widely underreported and underdiagnosed, their true prevalence may be even higher. Stigma and misunderstanding are pervasive, and mental health treatment resources are inadequate across every region of the world.[5]

Our mental unwellness extends far beyond mental illnesses. As the world's population ages, the number of people with **dementia** is expected to increase from 50 million in 2018 to 82 million by 2030.[6] **Stress, anxiety, and burnout** are rising across all age groups and in all corners of the world. According to Gallup's *Global Emotions Report*, one in three people globally said they have experienced a lot of worry or stress in 2018.[7] Work-related distress has become so alarming that in May 2019, the World Health Organization (WHO) began to recognize "burnout" as an "occupational phenomenon" linked to chronic workplace stress.[8] **Loneliness** is surging in countries around the globe[9] and is associated with a greater risk of heart disease, depression, anxiety, dementia, and premature death.[10] And according to the *World Happiness Report*, happiness is on the decline in many countries, while **sadness, worry, and anger** have been rising worldwide over the past decade.[11]

Many factors conspire against our mental wellness. At the individual level, numerous lifestyle factors play a role, including poor nutrition, lack of sleep, inadequate physical activity, declining participation in religious and community organizations, and increased time spent indoors and in front of screens instead of in nature. Our living and working environments create significant stress and reduce our mental wellness, including ever-present technology and social media, the 24/7 intrusion of work into our lives, and modern built environments and cityscapes that discourage community connections and social trust. Our mental wellness is also influenced by broad social and macroeconomic shifts, such as changing family structures; the rise of personal values that emphasize individualism, consumerism, and status; and the hyper-competitive nature of the globalized economy.

According to *The Lancet*, the true burden of mental illness is underestimated, and it is "a major driver of the growth of overall morbidity and disability globally." Mental illness ranks first among all causes of the global burden of non-fatal disease and disability (accounting for 32.4% of years lived with disability). It is on par with cardiovascular and circulatory diseases for the total years of life lost to disability, ill-health, and premature death.[12] Beyond the economic costs – estimated to reach $16.1 trillion globally by 2030[13] – mental illness takes a staggering toll on people and society in the form of homelessness, poor educational and health outcomes, unemployment, and higher rates of poverty.[14]

COVID-19 has accelerated the deterioration of mental health and well-being worldwide.

Both the United Nations (UN) and World Health Organization (WHO) have warned of a looming mental health crisis as "millions of people worldwide are surrounded by death and disease and forced into isolation, poverty and anxiety by the pandemic of COVID-19"[15] – a crisis that some have labelled the "second pandemic."[16] The stress, trauma, and fear of physical illness and death are massive, but the mental, psychological, and emotional burden extends far beyond the disease itself. According to the Director-General of the WHO, "Social isolation, fear of contagion, and loss of family members is compounded by the distress caused by loss of income and often employment."[17] Highly vulnerable populations include frontline and healthcare workers, children and youth, the elderly, women and parents, and those who are unemployed or living in financial duress – in addition to those who have contracted the virus themselves, cared for a sick family member, or lost loved ones.[18]

Data from the first three months of the pandemic show that 60% of the population in Iran, 45% in the United States, and 35% in China suffered mental distress due to COVID-19.[19] One recent study found that the prevalence of depressive symptoms in U.S. adults more than tripled during the early months of the pandemic.[20] Increasing symptoms of depression and anxiety have been reported across many countries. Those who previously suffered from some form of mental distress (e.g., anxiety, loneliness, grief) may be pushed toward a full-blown mental illness, while those with diagnosed conditions can experience a worsening of symptoms. Pandemic-related social isolation, reduced physical activity, and stress may affect brain health and development in children and adolescents, while increasing the risk of cognitive decline and dementia in the elderly.[21] Governments around the world are bracing for a historic wave of depression, substance abuse, self-harm, post-traumatic stress disorder, and suicide.[22] To make matters worse, COVID-19 has further diminished access to mental health treatment resources that were already grossly inadequate worldwide prior to the pandemic. A WHO survey conducted in summer 2020, across 130 countries, found that COVID-19 has disrupted or halted critical mental health services in 93% of countries, even as demand for these services is increasing.[23]

Mental wellness offers a path forward to meet widespread needs and increase well-being for all.

Unprecedented times call for unprecedented strategies. COVID-19 has not only exposed the wide gap between mental health needs and mental health resources, but also how vulnerable we all are, even when our level of mental distress does not meet the criteria for a diagnosed mental disorder. Mental wellness – both as a concept and as a set of strategies – can help to address this mounting crisis.

A rapidly growing number of consumers are embracing wellness as a dominant lifestyle value, and there is growing recognition that our physical and mental health are closely connected. Our increased willingness to acknowledge the stress, anxiety, and unhappiness of modern life – alongside our growing interest in meditation and mindfulness, self-help, sleep, and brain health – signal a collective awakening to the importance of mental wellness and the need for integrative strategies and solutions. We are reaching back to ancient practices and spiritual traditions for mental wellness (e.g., meditation, chanting, shamanism), while simultaneously leveraging cutting-edge science and technologies that offer new services and solutions, new avenues to learn and access different mental wellness modalities, and new research and scientific understanding of how our brains work.

A big shift toward mental wellness is just beginning: as a personal pathway toward higher levels of well-being, as a public health and community strategy, and as a business and investment opportunity. Practitioners and consumers have been leading the way, with a vibrant private sector creating new solutions, services, and products to help people build resilience and improve their mental wellness. Yet, the understanding of mental wellness is often fuzzy, and to date there has been no definition or quantification of this burgeoning mental wellness marketplace.

This study will offer a definition for mental wellness; clarify concepts and outline pathways; define mental wellness as an industry for the first time and delineate its segments; and estimate the size of the global mental wellness economy.

Endnotes

[1] Authors' analysis of data from the *Global Burden of Disease Study 2019*, downloaded from: Institute for Health Metrics and Evaluation, *Global Health Data Exchange*, http://ghdx.healthdata.org/, accessed October 16, 2020. In this dataset, "mental disorders" include schizophrenia, depressive disorders, bipolar, anxiety disorders, eating disorders, autism spectrum disorders, attention-deficit/hyperactivity disorder, conduct disorder, idiopathic developmental intellectual disability, and other mental disorders; "substance use disorders" include alcohol use and drug use disorders.

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II. Defining Mental Wellness

Mental wellness is a term that is increasingly used in the popular lexicon, but it is vague and not well-understood. People associate mental wellness with many different types of activities: meditating, listening to music, talking to a friend, taking a walk in nature, taking a vacation, getting a massage, taking a bubble bath, squeezing a stress ball, or just carving out some time for peace and quiet in daily life. When we talk about mental wellness, we are not just focusing on our mental or cognitive functioning, but also our emotions; our social relationships; our ability to function in daily life; and even our spiritual, religious, or existential state. Most people would agree that mental wellness is different than happiness, but very few could elaborate precisely how the two are different. Sometimes the term *mental wellness* is used synonymously with *mental health* or *mental well-being*, two terms that are also not well-defined. Below we offer a simple and concise definition for mental wellness. A summary of related terminologies and definitions (for mental illness, mental health, mental well-being, and happiness) is provided in *Appendix A*.

What is 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.

This definition characterizes mental wellness as a dynamic, renewable, and positive **resource**, and as an active **process** that requires initiative and conscious action. It recognizes mental wellness as an internal experience that encompasses **multiple dimensions**:

- ***Mental:*** How we *think*; how we process, understand, and use information.
- ***Emotional:*** How we *feel*; how we manage and express our emotions.
- ***Social:*** How we *connect*; our relationships with others.
- ***Psychological:*** How we act or *function*, or how we "put the pieces together;" taking external inputs along with our internal capacity and then making decisions or doing things.

Our new definition of mental wellness distills the concepts included in many existing definitions, notably from the World Health Organization (WHO) and the U.S. Surgeon General (see *Appendix A*),[1] to align with current practices and understanding. Key concepts included in those definitions are: feeling good, being resilient and functional, enjoying positive relationships, contributing to society or community, realizing potential, and having a sense of fulfilment or coherence. Mental wellness is sometimes associated with the concept of psychological well-being, which includes self-acceptance, growth, purpose, autonomy, environmental mastery, and positive relationships.[2] Mental wellness has been described as a process, a resource, a state of being, or a balance point between resources and challenges.[3] Our definition builds upon well-established (but not widely known) theories from psychology and academic literature, and it **frames them in a language that is more understandable to consumers, businesspeople, and policymakers**.

Figure 1

What Is 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.

Mental wellness is a **resource** because it is dynamic, renewable, and positive.

Mental wellness is a **process** that we must engage in proactively, it is not a static state of being.

Mental wellness is not only "mental" but has **several dimensions:**

THINKING
Mental Dimension

CONNECTING
Social Dimension

FEELING
Emotional Dimension

FUNCTIONING
Psychological Dimension

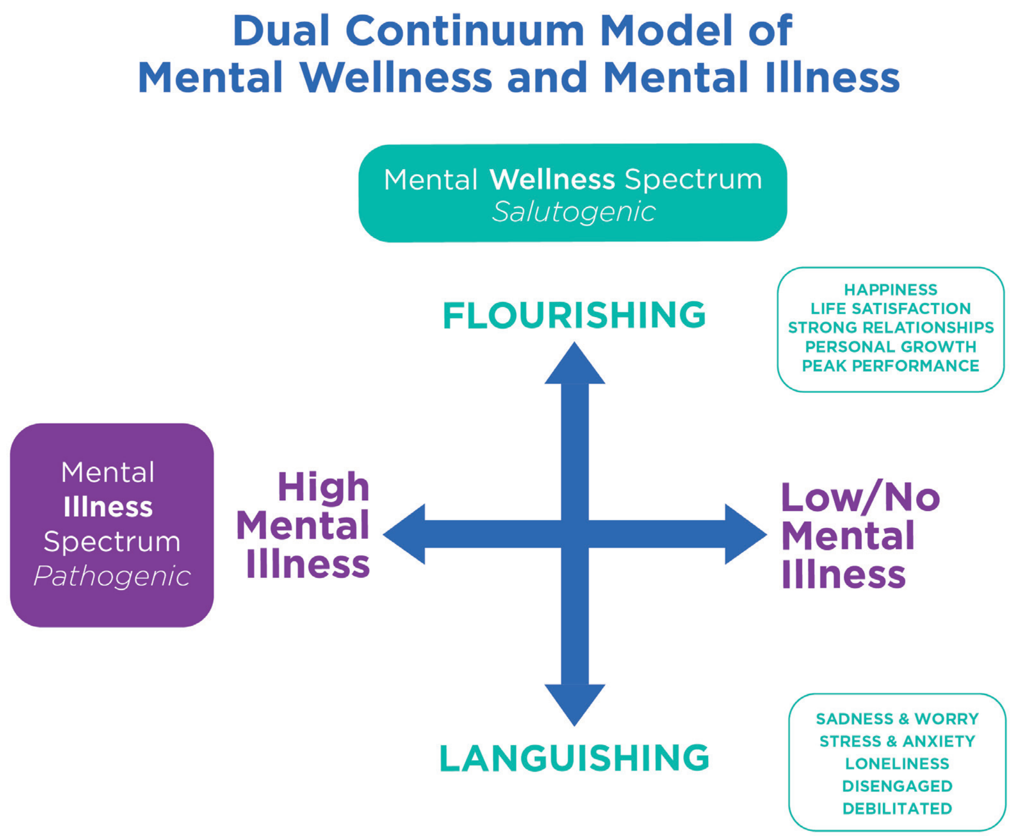
Source: Global Wellness Institute

Five key things everyone should know about mental wellness.

1. Mental wellness is more than just the absence of mental illness.

There is a tendency to think of mental wellness and mental illness as a simple continuum, with severe and chronic mental disorders on one end, happiness and flourishing on the other end, and varying degrees of resilience or coping with mental and emotional disturbances in the middle. This view does not accurately reflect the nuanced and dynamic relationship between mental illness and mental wellness. **The complex relationship between mental illness and mental wellness is best understood by envisioning them sitting on two separate continuums** (see *Figure 2*).

Figure 2



The dual continuum model was adapted by GWI from concepts developed by Keith Tudor (1996) and Corey L.M. Keyes (2002). Source: Global Wellness Institute

This "dual continuum" model has been adapted by the authors from work first developed by the Canadian Minister of National Health and Welfare (1988[4]), social worker/psychotherapist Keith Tudor (1996[5]), and sociologist/psychologist Corey Keyes (2002[6]). The dual continuum model aligns with the core tenets of wellness. It embraces a holistic or "complete state" approach to mental and physical health, in which good health is not just the absence of illness (a *pathogenic* approach), but also the presence of wellness or something positive (a *salutogenic* approach).[7]

- **The horizontal axis measures mental illness from high to low.** This axis measures the presence or absence of diagnosable mental disorders (e.g., depression, anxiety, personality disorders, etc.), based upon the *Diagnostic and Statistical Manual of Mental Disorders, 5th Edition (DSM-5)*. Treatment of mental illness typically takes a clinical or *pathogenic* approach, which focuses on diagnosing a problem, treating the symptoms, and bringing a person back to "normal." Care is typically delivered by trained mental health professionals (e.g., psychiatrists, psychologists, social workers, etc.).
- **The vertical axis measures mental wellness from languishing to flourishing.** This axis captures the many factors that shape our overall mental health and well-being, but are not clinical conditions – e.g., stress, worry, loneliness, or sadness at the negative end, and happiness, life satisfaction, strong relationships, or personal growth at the positive end. Mental wellness offers a *salutogenic* approach that focuses on positive human functioning: preventing illness, maintaining good mental health, and pursuing optimal mental well-being. Mental wellness is self-directed, personal, and subjective; it typically relies on self-care and personal agency to cope with everyday challenges and proactively pursue a higher level of happiness and well-being. Mental wellness can be empowering because it acknowledges the universal desire for peace, joy, happiness, meaning, and purpose.

Subsequent research over the last two decades has supported the dual continuum model, which captures several important concepts about mental wellness and mental illness:[8]

- **A lack of mental illness does not equate to mental wellness.** About 15% of the world's population suffers from a diagnosed mental or substance use disorder,[9] but that does not mean that the other 85% of the population is "mentally well" or leading healthy, happy, productive, and satisfied lives. Many people who do not have a mental illness still "do not feel healthy or function well,"[10] because of pervasive stress, worry, loneliness, and other challenges. Those who are "languishing" rather than "flourishing" (even when free of a diagnosed mental illness) tend to do worse in terms of "physical health outcomes, healthcare utilization, missed days of work, and psychosocial functioning."[11] Low mental wellness ("languishing") can be debilitating; it is more common than depression and is associated with emotional and psychosocial impairment comparable to that of a depressive episode.[12]
- **Mental wellness can co-exist with mental illness.** Research on the dual continuum model shows that the presence of mental illness does not necessarily imply an absence of mental wellness, and vice versa. For example, a person with obsessive compulsive disorder, attention deficit disorder, or mild depression can still demonstrate moderate or positive mental wellness (e.g., having good relationships, feeling happy, or functioning well at a job). Corey Keyes' study of Americans ages 25-74 found that 70% of those with a diagnosed mental illness had a "moderate" or "flourishing" level of mental wellness. Meanwhile, among those free of mental illness in the previous year, only 20% were "flourishing" in their mental wellness.[13]
- **Mental wellness can mitigate and prevent mental illness.** Increasing our level of mental wellness can protect us against developing mental illness and can also mitigate the symptoms of these illnesses. Keyes' studies showed that those who are "flourishing" function better than those with moderate or "languishing" mental wellness, regardless of whether a person has a diagnosed

mental illness or not. People whose level of mental wellness declined from flourishing to moderate were over 3.5 times more likely to develop mental illness than those who stayed flourishing, while people whose mental wellness declined from moderate to languishing were 86% more likely to develop mental illness. Meanwhile, Keyes' research also showed that improving one's mental wellness from languishing to moderate reduced the risk of future mental illness by nearly half.[14] We are not suggesting here that mental wellness can solve or cure mental illness, but that the practices that support and improve our mental wellness (e.g., good sleep, good nutrition, exercise, meaningful relationships, reducing stress, meditation) are increasingly recognized as protective factors for our mental health, as well as helping reduce the severity and symptoms of mental illness (alongside conventional treatment regimens).[15]

2. Mental wellness is an active process of moving from languishing, to resilience, to flourishing.

Our mental wellness is not a static state of being. Mental wellness is a lifelong process and a proactive strategy to strengthen our mental, emotional, social, and psychological resources. On one level, mental wellness is about prevention; coping with life's adversity; and being resilient when we face stress, worry, loneliness, anger, and sadness. On another level, **mental wellness moves us toward a deeper, richer, and more meaningful human experience, which is often described as flourishing.** The notion of flourishing as the peak mental state has been shaped by developments in the psychology field during the 20th century, including Abraham Maslow's hierarchy of needs, Carl Rogers and humanistic psychology (a holistic approach of self-exploration and working toward full human potential), and Martin Seligman's positive psychology (emphasizing *eudaimonia* and human flourishing). Concepts of self-actualization, the pursuit of fulfillment, and the untapped potential that lies in all people were disseminated and popularized by the Human Potential Movement in the 1960s-1970s.[16]

The psychology field has explored various methods of measuring individuals' mental wellness (see *Appendix B* for more information on the approach proposed by Corey Keyes, in relation to the dual continuum model), but these tools depend upon self-reporting and are inherently subjective.[17] Flourishing is a personal experience. For some people, it may mean functioning at the top of their game on a daily basis – staying engaged, sharp, and focused; and achieving their life goals and vision. For others, flourishing could mean moving toward self-transcendence – going beyond the "self" to associate with a higher purpose; living in truth, unity, and harmony with the universal order; and developing a sense of peace and joy that is independent of external circumstances or events. This concept of mental wellness is often associated with the realms of human consciousness, spiritual practices, and religious devotion.[18] Our definition of what it means to flourish is also shaped by culture.[19] For example, in some cultures people put the highest value on individual balance and inner harmony for living a thriving and happy life. Other cultures may take a more collectivist view, placing high value on peace, family relationships, and social harmony. The important point is that flourishing (as a peak level of mental wellness) is different for different people, depending on their values, beliefs, culture, and personal journey.

3. Mental wellness helps to shift the perspective away from stigma to shared humanity and shared responsibility.

Even though the mental health field has done a lot of work to mitigate the stigma surrounding mental illness, a sense of shame, denial, and secrecy continues to afflict people in communities and cultures around the world.[20] Mental wellness can help shift our focus toward a more positive and empowering approach (how we can feel, think, connect, and function better), rather than just avoiding or coping with illness. Importantly, mental wellness emphasizes our capacity to build resilience; to reduce suffering; to find inner peace, joy, and fulfilment; to seek purpose, meaning, and happiness; and to connect to others. By acknowledging this as a universal condition and longing shared by all people, there is no need to feel shame or to feel that we are alone in this endeavor.

During the last century, modern psychology and its approaches to treating mental illness have tended to focus on individual behavior and individual-level interventions, such as talk therapy and drugs. Mental wellness favors a more holistic approach that encompasses personal agency alongside social and environmental dimensions (e.g., family, friends, community connections, living environments). In doing so, mental wellness helps shift our perspective toward a sense of shared humanity and shared responsibility, while also bringing attention to the many external forces that deeply influence our overall mental health and well-being – including socioeconomic status, culture and values, built environment, technology, and much more.

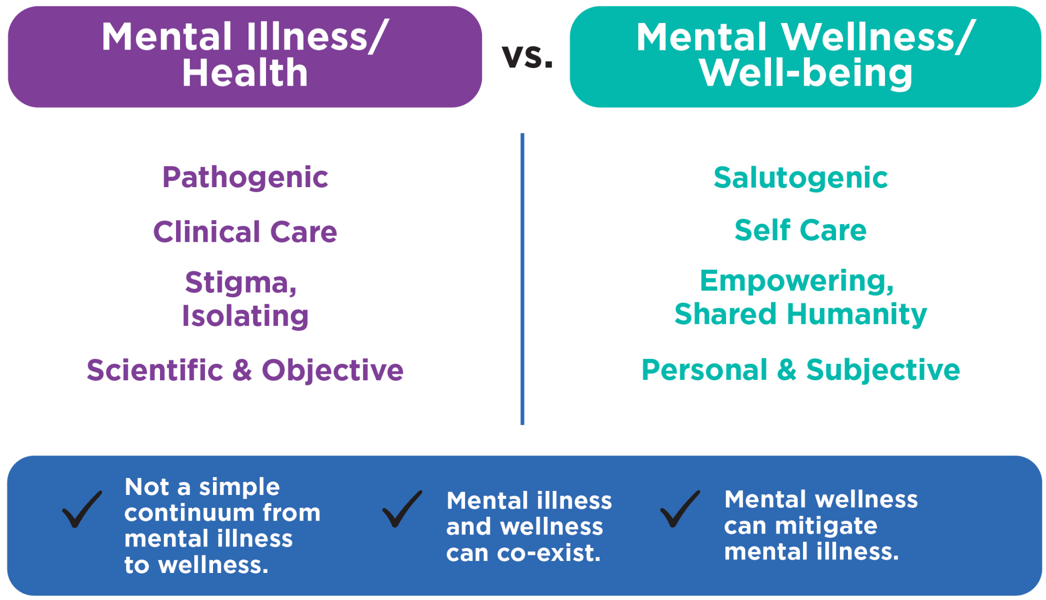
This approach does not ignore or refute the immense need for more resources and better methods to address and treat mental illness. Rather, it emphasizes that the promotion of mental wellness is an equally important (yet often overlooked) approach that can address a multitude of individual and societal problems (such as loneliness and stress), while also complementing approaches to mental illness and even helping to prevent mental illness and reduce its associated costs.

4. Mental wellness grows out of a grassroots, consumer-driven movement.

There is a huge global need to address mental illness and to help people in mental distress who are vulnerable to developing a full-blown mental disorder. The needs are vast, and resources are scarce, and the "talk and pills" approach does not work for everyone. Meanwhile, people with poor mental wellness ("languishing") desperately need non-clinical, non-pathologizing strategies and tools to cope. As discussed above, evidence shows that improving our mental wellness can even reduce our risk of developing mental illness. And yet, not enough attention is paid globally to mental illness *prevention* and mental wellness *promotion*, and mental health has never been well-integrated into public health structures.[21]

Our healthcare systems (including mental health) are not set up to help the spiraling number of people who are facing everyday mental and emotional challenges like stress, burnout, loneliness, or sadness. In response to these immense gaps, mental wellness has grown out of a grassroots, consumer-led movement that seeks self-directed, alternative solutions outside of the established fields of medicine, psychiatry, and psychology. Mental wellness encompasses many natural and complementary modalities that have been around for millennia, and that have operated on the fringes of modern psychology and medicine for decades. It embraces a holistic approach that recognizes the mind-body connection, and therefore extends to lifestyle strategies such as nutrition and exercise. Mental wellness modalities mostly exist outside of healthcare systems and reimbursement schemes. Presently, many of these modalities lack the validation of clinical evidence and double-blind studies that are required for approval of medical treatment protocols and pharmaceuticals.

Figure 3



Source: Global Wellness Institute

Since the beginning of mankind, humans have been on a quest for mental wellness – to understand ourselves, to improve our minds, and to find happiness and fulfillment. All of the modalities that we typically associate with mental wellness today (from meditation and sound healing, to crystals, stress gadgets, and psychedelic drugs) are rooted in ancient practices, spanning every corner of the globe. The hippies and counterculture movement brought these practices to a modern, mainstream Western audience in the 1960s-1970s (see *Appendix C*).[22] In recent decades, it was the practitioners of meditation – including the Dalai Lama – who boldly advocated that neuroscientists study the human brain in relation to meditation, much to the chagrin of many scientists.[23] Since then, the concept of neuroplasticity has gained significant understanding and recognition, and hundreds of scientific studies have examined meditation's potential to address numerous mental disorders, improve mental wellness, and prevent cognitive decline.[24] In the realm of mental wellness, practitioners, consumers, and businesses will continue to lead the way, pushing science into areas where it has not gone before to consider the efficacy of ancient practices and emerging solutions.

5. Mental wellness is multi-dimensional, holistic, and personal.

Mental wellness recognizes the integrated and holistic nature of our health and well-being. The state of our mind affects our body, and vice versa. Our mental wellness is also connected to our beliefs and values, to other people, to nature, and even to the realms of consciousness and spirituality. The approaches for improving our mental wellness are diverse and inclusive, and they are enriched by cultural, social, and religious traditions and contexts. The numerous pathways toward mental wellness have been extensively catalogued in GWI's 2018 Mental Wellness Initiative white paper[25] and in a recently published chapter in the *Oxford Research Encyclopedia of Global Public Health*.[26]

Figure 4

Source: Global Wellness Institute

In this study, we segment mental wellness pathways into four broad domains: activity and creativity; growth and nourishment; rest and rejuvenation; and connection and meaning (see *Figure 4*). Each of these domains has mind-body and internal-external dimensions, although their boundaries may be blurred due to the inherently holistic and interconnected nature of wellness and wellness modalities. For example, some people do yoga as exercise (putting it in the "activity and creativity" domain), while for others yoga is more of a meditative practice (putting it in the "rest and rejuvenation" domain). Likewise, mindfulness spun out of and is most closely associated with meditation ("rest and rejuvenation"), but it has been integrated into therapy ("growth and nourishment") and many other aspects of life, from mindful eating to mindful coloring. The point of this framework is not to put each activity or modality cleanly into a box, but rather to emphasize several important points (which are discussed further in *Chapter III*):

- **Mental wellness pathways are multi-dimensional and holistic.** Just like wellness in general, mental wellness is linked to many dimensions of our health and well-being (physical, social, emotional, spiritual, etc.). The things we can do to support and improve our mental wellness are vast and limitless, from taking a walk, to meditating, to getting better sleep, to volunteering in our community.
- **The mind-body connection is critical to mental wellness.** The things we do for our physical health (like eating well or exercising) are just as (or more) important for our mental wellness as the things we do specifically for our minds (like meditating or reading a self-help book).
- **Mental wellness pathways are personal and subjective.** Each of us has different needs and interests when it comes to supporting our mental wellness – some of us may relax and de-stress by going to the gym, others find solace in prayer, while others may feel best when playing with their pet.
- **Mental wellness pathways can be accessed through many places and spaces in our daily lives.** When we look at the diversity of mental wellness pathways, it is clear that countless places, spaces, organizations, and businesses can play a role in helping or hindering our mental wellness – from our homes, neighborhoods, and cities; to our workplaces and schools; to our churches, mosques, and temples; to fitness centers and grocery stores.

Activity and Creativity:

Physical activity – from walking and running, to cardiovascular exercise, to sports, dance, yoga, and martial arts – can require concerted mental engagement, can help us relax and de-stress, and can have a profound impact on our mental wellness. While there is insufficient scientific consensus as to how exactly exercise elevates mood (whether by increasing serotonin, improving sleep regulation, promoting social connection, or providing a meaningful activity or a sense of accomplishment, etc.), its beneficial impacts on our mental wellness are well-established and well-documented.[27]

Similar to our bodies, our minds need exercise in the form of **play**, **creativity, discovery, and learning**. We all have different things that interest and engage us, both in our jobs and in our leisure time. There are countless ways to stimulate our minds, to express ourselves, to be curious, to feel alive, to master new things, and to experience fun and laughter. For some people it could be reading, cooking food, making furniture, playing a board game, or listening to hip hop music; for others it could be painting, singing in a choir, fixing an appliance, writing a computer program, or doing a spreadsheet.

Growth and nourishment:

Our minds need to be nourished in order to grow. Some of the activities mentioned above (e.g., music, arts, hobbies, reading, and other intellectual or creative pursuits) can also nourish our minds and promote growth. In this category, however, we include strategies such as **self-help, therapy, coaching and mentoring**, and **cognitive enhancement and brain training**, which are all conscious and proactive efforts to support our personal development or brain health. Obviously, not everyone will feel the need to seek out self-help books, therapy, or cognitive training, but these modalities are available to those who have an interest in or a need for these kinds of proactive efforts.

On the physical side, a growing body of research has demonstrated the importance of a **healthy diet and nutrition** for brain health.[28] Emerging understanding of the gut-brain axis, the microbiome, and the impacts of nutrition on neurological function/decline is creating new opportunities to nourish the brain through

dietary supplements such as vitamins, minerals, pre- and probiotics, and polyphenols. Since ancient times, **plant-based drugs** (e.g., mushrooms, cannabis) have been used by humans for their mind-altering and mind-enhancing properties. New scientific research over the last couple of decades has brought renewed interest in the potential of these drugs for boosting energy, creativity, and brain performance, as well as for treating some mental disorders.

Rest and rejuvenation:

To counterbalance mental activity, creativity, and growth, our brains also need rest, recovery, and rejuvenation. **Sleep** is a physical process that is vitally important to our mental wellness; a lack of sleep increases our risk of developing some mental illnesses (e.g., anxiety, depression), affects our cognitive functioning, and can lead to chronic physical health conditions.[29] In addition to their physical health benefits**, mind-body practices** such as yoga, tai chi, qigong, and breathwork are believed to promote mental rest and recovery, and clinical research is increasingly demonstrating their efficacy in mitigating specific mental and physical health conditions. An ever-growing array of **sensory products and experiences** are available in the wellness arena and in the consumer retail space, including touch (e.g., massage, reiki, weighted blankets, fidget spinners), aroma (e.g., aromatherapy, home fragrances), sound (e.g., gong baths, white noise machines), and light (e.g., circadian lightbulbs). These products and services are rising in popularity because of a growing recognition that our senses can affect our stress levels, our ability to relax and sleep, our ability to focus, and our overall mental wellness – even though most of these have not yet been vetted by rigorous clinical studies.

Meditation and mindfulness have received the most attention in recent years as important mental wellness practices; however, the two are sometimes misunderstood and conflated. Today, there are many different types of meditation (from 2 to 23, depending on the source). The Global Wellness Summit's *Meditation Goes Plural*[30] lays out three main types of meditation: 1) focused attention (mostly associated with Vipassana meditation in the Buddhist tradition); 2) open monitoring (focused on opening awareness, and spanning many forms of mindfulness meditation and related mindfulness practices outside of meditation); and 3) self-transcending (typically using a mantra). Numerous research studies have documented the impacts of meditation on brain activity, such as accelerating or slowing certain brain waves (Alpha, Beta, Gamma, Theta, and Delta) during practice. Among the documented mental wellness impacts of meditation are: reduction of the "fight or flight" response; improved cognitive function, better focus, and higher creativity; and improved neuroplasticity in long-term practitioners. The concept of **mindfulness** initially spun out of Jon Kabat-Zinn's efforts to bring Buddhist meditation to medicine and a Western, secular audience in the 1970s-1980s. Today, mindfulness is viewed more as a quality, an awareness, or a way of living rather than a "practice" like meditation. Mindfulness can be cultivated through formal practices like meditation (including "mindfulness meditation") or therapy (such as mindfulness-based cognitive therapy), as well as informally in our daily lives (mindful eating, mindful walking, mindful conversation, mindful parenting).[31]

Connection and meaning:

Internally, connection means being grounded in a deeper and more profound sense of purpose beyond our physical existence and our individual, biological instincts for survival. Many people find connection and meaning through **religious and spiritual practices**; studies have repeatedly shown that people who actively practice a religion have a higher sense of well-being and happiness.[32] Faith practices help take our focus off ourselves, while putting our lives and experiences into a larger context. The practices of **gratitude, altruism, and compassion**, while rooted in many world religions, can also be pathways to happiness and well-being in an agnostic sense. Studies have shown that altruism – elevating the well-being of others, or serving and helping others – contributes to individual resilience and happiness, even during times of hardship.[33]

Externally, the sense of **being connected to other people**, and to the broader world, is intrinsic to our mental wellness. Unfortunately, loneliness and social isolation have been recognized by global public health organizations as having reached epidemic proportions, a development further aggravated by COVID-19.[34] In addition to connections with friends, family, and other people, studies have shown that being close to **nature, pets, and living things** can have a therapeutic effect on us, helping to reduce negative emotions, promoting calmness of the mind, and even aiding in physical healing.[35] **Civic engagement and volunteering** give us an avenue to contribute to our community and society, and empower us to effect change in the world around us, and have also been shown to have positive effects on our health and well-being.[36]

Endnotes

[1] As discussed in *Appendix A*, the WHO and U.S. Surgeon General discuss and define the concept of "mental health," which the Global Wellness Institute interprets in this report as being the same as "mental wellness." See: 1) World Health Organization (2018, March 30). Mental health: Strengthening our response. *WHO Fact Sheet*. https://www.who.int/news-room/fact-sheets/detail/mental-health-strengthening-our-response. 2) Satcher, D.S. (1999). *Mental Health: A Report of the Surgeon General – Executive Summary*. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC1308561/pdf/pubhealthrep00023-0091.pdf.

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III. Personal Agency Versus Collective Responsibility

Our individual pathways for mental wellness are unique and subjective.

Similar to wellness in general, our pursuit of mental wellness is personal and subjective. In the previous chapter, *Figure 4* presents the wide range of pathways and modalities that can help us improve our mental wellness (or to "move up" the mental wellness continuum, from languishing, to moderate, to flourishing). The connections between these pathways and our mental wellness have all, to some extent, been demonstrated by scientific research. But, this certainly does not mean that we have to do *all* of these things for our mental wellness. And, science does not indicate that certain pathways and modalities are more essential or more effective than others, because each individual has unique needs and will be motivated by different things.

We can think of *Figure 4* as a menu of options for pursuing mental wellness; people can choose from many different strategies and activities and find the ones most important for them. Essentially, these options are the "building blocks" that form the foundation and structure of our mental wellness resource. Each one of us can put different blocks together in different ways. For some of us, being physically active is critical to our mental wellness; exercise not only affects our mood, but also our sleep patterns and eating habits, and can help us find a sense of community. For others, art and creativity are essential to relaxing, expressing ourselves, and connecting with the world. Some of us may need to be in nature – listening to bird songs and the rustling of leaves, breathing in the scent of soil, and walking in solitude – in order to feel a sense of calm and peace. Millions of people make religious practice the center of their mental wellness, with their faith giving them not only meaning, purpose, and transcendence, but also a framework for lifestyle habits like diet, exercise, and social connections (e.g., Seventh Day Adventists). There are many options but no set path that everyone must follow. Sometimes, our circumstances change, and we need to adopt new practices or strategies to handle stress, improve resilience, and deal with adversity.

There is great inequity in our access to mental wellness pathways and modalities.

The notion that mental wellness is about individuality, self-care, and personal responsibility does not imply that it is solely an individual pursuit or that it is fully within our own locus of control. Many of the pathways for mental wellness may sound like simple healthy lifestyle habits (e.g., eating well, exercising), but a multitude of factors outside of our own control determine whether we can practice these habits at all. Some obstacles might be financial: while many mental wellness modalities can be done for free (e.g., taking a walk, meditating, participating in a religious community), many others are only affordable for the wealthy (e.g., joining a fitness center, hiring a life coach, going on a meditation retreat). Other major obstacles include the physical, social, cultural, and economic environments in which we live: a lack of time for exercise and recreation; a lack of knowledge about good diet or lack of access to healthy foods; a lack of access to parks and natural areas; disturbances by noise and light pollution; a lack of opportunity to practice or enjoy music and the arts; cultural norms that prevent women and girls from participating in certain activities; a lack of freedom to practice our faith; or a political system that prevents us from participating in civic life. The built environment, macroeconomic conditions, social and cultural norms, government policies, employers, schools, community organizations, and businesses all play a major role in enabling access to healthy lifestyles and removing obstacles for people to build up their mental wellness resources.

The external and macro environment is a major determinant of our mental wellness.

The external and macro environment is not only an enabler or obstacle to pursuing mental wellness; it is often the very cause of our mental distress (see *Figure 5*). People who are subject to systematic violence, cruelty, discrimination, abuse, injustice, war, poverty, famine, displacement, natural and manmade disasters, and other dire situations suffer major blows to mental wellness that are outside of their control. In these situations, meeting basic needs (e.g., safety, security, food, shelter, medical care, employment) may be more essential to mental wellness than the individual pathways elaborated above (in *Figure 4*). These types of trauma can trigger chronic mental distress that may take years, a lifetime, or even generations to overcome, and that may also lead to clinical mental illness.

The wellness, happiness, and positive psychology movements are sometimes criticized for implying that happiness and wellness are within everyone's reach, or that if we just make changes from within, we will have the power to improve ourselves and feel better. Critics have pointed out that this viewpoint can be a form of "victim blaming" – i.e., if we are unhappy, it is our own fault for not practicing mental wellness strategies. This view also deflects responsibility from the greater ills in our economic, social, and political systems that create mental distress and unhappiness in the first place.[1] The interactions between our mental wellness and the external environment can be complex. The *World Happiness Report*, for example, has found that even in adverse situations such as ill-health, unemployment, discrimination, family breakdown, and fears about the safety of the streets, people who have higher levels of social trust and institutional trust report higher levels of well-being as compared to people living in a low social/institutional trust environment.[2]

Individual practices can fortify our mental wellness, even under adverse circumstances.

It would be naïve and unfair to suggest that all of our troubles – personal, emotional, financial, societal, political, etc. – can be "meditated away." And yet, even in negative situations, the individual mental wellness pathways described in *Chapter II* (e.g., yoga, meditation, mindfulness, faith, gratitude, altruism, connection with friends, time in nature, etc.) can reduce stress and help us build greater resilience, clarity, and hopefulness, thereby fortifying our mental wellness resources to help us deal with adversity (see *Figure 5*). For example, research studies (albeit with relatively small sample sizes) are accumulating evidence that yoga and meditation have helped populations in adverse circumstances such as those living in homeless shelters, prisons, or refugee camps; war victims and veterans with post-traumatic stress disorder; or those dealing with addiction.[3]

Businesses and governments can give people a boost on their mental wellness pathways.

Many mental wellness strategies can be incorporated into our daily lives and can help us, no matter what our life circumstances might be. Many of these practices are free and are accessible to all people, especially if we live in an enabling and supportive environment (see *Figure 5*). In fact, as a society, we need to make sure that our living environments are not harmful to our mental wellness. We should support the mental wellness of everyone, especially those who are vulnerable due to their personal and socioeconomic situation, because **mental wellness is for all**.

Mental illness and mental unwellness impose a massive economic and societal burden around the world. **Governments and businesses have an incentive to promote mental wellness because it can mitigate these rising costs.** As discussed in *Chapter II*, practices that improve our mental wellness can not only lessen the symptoms of mental illness, but also reduce our risk of developing a mental illness. Mental wellness is also linked with many other positive outcomes, including better physical health, longevity, social relationships, and work performance.[4] And yet, most of the focus in government and healthcare circles is on improving treatment, care, and resources for mental illness, while not enough resources go to the promotion of better mental wellness (e.g., community-based and lifespan-based interventions, increasing access to mental wellness pathways and modalities for individuals, etc.).

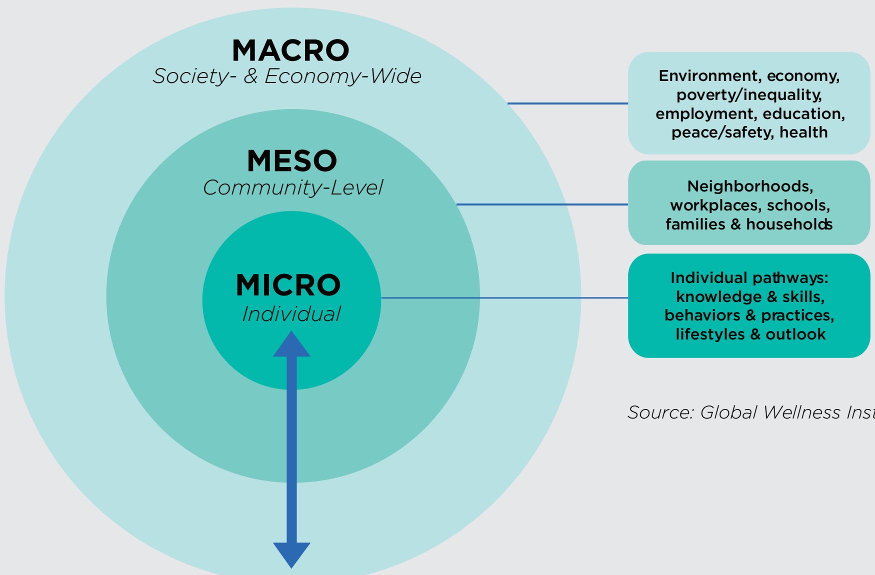
Governments play a major role in our access to mental wellness. At the highest level, external and macro-level circumstances (e.g., poverty, unemployment, war, hunger) are major impediments to mental wellness, and these are shaped by government policies both nationally and locally (see *Figure 5*). Governments can help build up our mental wellness resources and enhance neuroplasticity early in our lifespans by supporting good pre- and post-natal care,[5] or by teaching key skills like meditation and mindfulness in schools. At the city and community level, government policies can support mental wellness-enhancing physical and built environments (e.g., access to parks and green space).

Industry and businesses play a vitally important role in the mental wellness landscape. As discussed in *Chapter II*, mental wellness has grown out of a consumer-led, grassroots movement that demands self-directed, holistic, natural, and alternative solutions outside of the established fields of medicine, psychiatry, and psychology. Private businesses across many industries (hospitality, spas, technology, consumer goods, housewares, books and media, etc.) have become a major vehicle for developing new solutions by adopting and adapting mental wellness modalities and delivering them to consumers through multiple channels. For example, businesses have been especially active in launching technology-based innovations that expand access to mental wellness practices at a variety of price points; offer more choices and adaptations to individual preferences; provide new products, solutions, and experiences; collect new data and evidence; and attract research resources and investments. *Chapter IV* will describe the mental wellness modalities, services, products, experiences, and businesses that are emerging as part of this new *mental wellness economy*.

Figure 5

Supporting Mental Wellness for All: Three Levels of Action

We should not view mental wellness as a "hierarchy of needs," where the bottom of the pyramid represents basic macroeconomic and physical needs and stressors (e.g., safety, employment, food) that must be addressed before we can pursue "loftier" mental wellness practices like meditation and mindfulness. Mental wellness is not a luxury only for people who already have plenty of food, a good income, and a secure job. To the contrary, mental wellness is a basic and critical resource that we all need, no matter our life circumstances. We can envision mental wellness as a set of three concentric circles, which work together from the inside out and from the outside in:[6]



Source: Global Wellness Institute

- **The *micro* level represents individual practices and behaviors.** These are the ways we can build up our internal resources by engaging in the mental wellness pathways and modalities described in *Figure 4*. However, the importance of individual practices does not absolve society, governments, and businesses of responsibility for dealing with problems at the meso and macro levels.
- **The *meso* level represents our immediate living environments, including our neighborhoods, workplaces, schools, and families.** Research increasingly shows that environmental factors are a major determinant of our mental and physical health and well-being. For example, living in a neighborhood with a park, trees, and green space can enhance our mental wellness by giving us contact with nature and a place for respite and exercise. A toxic workplace culture can cause severe and ongoing stress, which we cannot mitigate through mindfulness or exercise. We depend upon our local governments, employers, community organizations, and families to help build environments that are supportive of positive mental wellness.
- **The *macro* level represents our society and economy.** This level refers to all of the broad, macro-level factors that often cause mental distress: pandemics, poverty, unemployment, inequality, hunger, war and conflict, education, etc. Individual mental wellness pathways cannot solve these problems. However, even those living in the worst macro-level circumstances (e.g., war zones, refugee camps) can benefit from individual mental wellness pathways to help them cope, build resilience, and deal with adversity.

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IV. The Mental Wellness Economy

From ancient traditions into a modern industry.

Since the beginning of civilization, humans have sought out ways to understand and improve ourselves, to find wholeness and happiness, to comprehend and cope with life's mysteries, to work toward a moral good, and to please the gods. Over the last 50-60 years, many of these efforts have come to be associated with the pursuit of mental wellness – from meditation to self-help, from stress gadgets to sound baths, and from sleep aids to brain supplements. All of these practices have deep roots in ancient culture, healing traditions, spirituality, philosophy, and literature, spanning every corner of the globe. However, the commercialization of these products and services and the coalescing of a "mental wellness industry" is a modern development. (See *Appendix C* for a more detailed history of various mental wellness practices).

The hippies brought mental wellness practices to a mainstream Western audience.

Almost every mental wellness practice that we know today was brought to a modern, mainstream, Western audience by the hippies and counterculture movement in the 1960s-1970s.[1] In fact, the various labels applied to this era – the "Me Decade," the "New Age movement," the "psychedelic era" – illustrate the prominent role that mental wellness practices played during this time. The "New Age movement" captures the exploration of Eastern and occult spirituality, mysticism, alternative lifestyles, and holistic and natural medicine. Meditation and yoga first took off in the West during this era, alongside a resurgence of ancient traditions such as sound healing (e.g., chanting, singing bowls), energy healing, crystals, aromatherapy, worry stones, and more. During the "psychedelic era" there was widespread experimentation with psychedelic drugs, acid trips, and altered states of consciousness. The "Me Decade" (a label coined by author Tom Wolfe[2]) popularized the concepts of self-actualization, personal well-being, recovery, and spiritual growth, marking the take-off of the modern self-help industry. During this period, many holistic wellness centers, retreat centers, ashrams, communes, and intentional communities sprung up across the United States and Europe, becoming centers for teaching and spreading practices related to mind-body connection, humanistic psychology, self-actualization, and many other fringe mental wellness ideas that have now become mainstream.

Gurus, sages, and celebrities are foundational to the development and spread of mental wellness, bringing both credibility and quackery to these practices.

Guruism is central to the development of many mental wellness practices. Today's self-help books have their roots in ancient works of literature and philosophy, in which philosophers and sages provided maxims and guidance on how to live (e.g., Socrates, Marcus Aurelius, Boethius, Machiavelli, Lao Tzu, Confucius, Rumi). Modern interest in self-help exploded in the 1980s-1990s, as people turned to media celebrities and writers for bite-sized wisdom to address daily problems. Oprah has had tremendous influence in bringing pop psychology and self-improvement concepts to a mainstream, worldwide audience, turning a number of personalities into overnight best-selling self-help gurus. Gurus and celebrities also played a key role in the rise of meditation and yoga, which were introduced to the West in the mid-20th century by Eastern spiritual masters who gave lectures and established communities of followers. In the 1980s and 1990s, yoga and meditation attracted a high-profile following among celebrities and athletes, making these practices hip and bringing them from the fringe into mainstream culture.

Today, gurus and self-help pundits have moved beyond the bookshelf and ashram, creating a multi-media self-help empire: TED talks, television channels, websites, social media, streaming platforms, apps, workshops, retreats, and more. Ever since the first modern self-help book was published in 1859 (Samuel Smiles' *Self-Help*), self-help authors have been criticized for quackery and hypocrisy, for being frauds, and for capitalizing on people's insecurities. Those criticisms have reached an apex today, now that anyone can become a guru if they can collect enough Instagram followers or celebrity endorsements. Some self-help gurus are real psychologists with academic pedigrees, and some meditation gurus have studied with renowned spiritual masters, while others may simply be peddling pseudoscience and hollow promises. It is ever more challenging for people to decipher the difference.

Modern science, medicine, and psychology are starting to catch up and legitimize traditional mental wellness practices.

For most of history, mental wellness practices remained in the realms of spirituality, philosophy, literature, intellectualism, and alternative/traditional medicine. In the last 150 years, advances in the physical sciences, biological sciences, neuroscience, and medicine have brought new discoveries and technologies that are allowing researchers to understand and document whether, and how, many popular mental wellness practices actually "work." In particular, medical imaging technologies and neuroscience (e.g., EEG, ultrasound, CT scanning, MRI) have paved the way for new research and scientific understanding of sleep, meditation, circadian rhythms, sound and vibration, aromatherapy, psychoactive drugs, and plant-based healing, as well as the critical connections between the mind and the body. In the future, building up a stronger body of scientific and clinical evidence for various mental wellness modalities will continue to be essential in legitimizing their efficacy, bringing them into the mainstream medical and psychological communities as effective treatment options, and encouraging public policy changes and investments in preventive mental wellness strategies. Scientific evidence is also essential to help consumers cut through the "guru culture" and "cult of celebrity," and to understand which mental wellness businesses, products, services, and solutions are real, and which are just woo-woo pseudoscience.

Technology and media are democratizing access to mental wellness practices, while simultaneously exposing us to mental wellness risks.

Technology and media platforms have helped to popularize and democratize many mental wellness practices, in particular, yoga, meditation, and self-help. In the 1960s and 1970s, Richard Hittleman's TV programs, such as "Yoga for Health," introduced yoga to millions of Americans. Through the 1980s-1990s, self-help gurus like Tony Robbins built up millions of new followers via TV broadcasts and infomercials. Bill Moyers' pioneering 1993 TV documentary, "Healing and the Mind," has introduced 40 million viewers to mind-body healing practices. Oprah's media empire brought meditation to millions of mainstream consumers when she promoted Deepak Chopra's 1993 book *Ageless Body, Timeless Mind* on her show. Today, mobile technologies, apps, streaming services, and social media are proliferating access to mental wellness concepts, guidance, and programming to new audiences around the world. The most notable trend is the booming business of meditation and mindfulness apps, with an estimated 2,000 new meditation apps launched just between 2015-2018 (and the number is certainly much higher today).[3]

And yet, technology has a fraught relationship with mental wellness. Our use of technology is increasingly recognized as having a negative impact on our mental and physical health. Our culture of constant connectivity creates stress, reduces sleep quality, and affects our attention and productivity. Screen time and social media usage can reduce the quality of our social relationships, affect childhood cognitive development, and have been linked with depression and anxiety.[4] There is a deep irony in apps' use of activity tracking, gamification, push notifications, and social media sharing to promote a sense of calm and mindfulness. Sometimes, the most mindful thing we can do is to turn off our mobile phones and all of our digital screens entirely.

Mental wellness has a long but complex relationship with spirituality.

Most of today's mental wellness practices are rooted in ancient spiritual traditions, but have been adapted by the modern wellness movement into secularized forms. In spite of these spiritual underpinnings, mental wellness has a complex and often uncomfortable relationship with religion. In particular, the spread of secular forms of meditation and yoga have created many controversies in Christian and Muslim religious communities around the world. Simultaneously, the secularization and commercialization of meditation (e.g., its adoption by Silicon Valley and the corporate world as an employee wellness offering and productivity-boosting measure) has been criticized as "McMindfulness," or the co-opting of Buddhist spiritual practices as a capitalist commodity.[5]

People around the world turn to prayer and religion as a source of coping, resilience, solace, and emotional and social support. Religion and spirituality are positively associated with emotional well-being and better mental health, and some people see a high level of mental wellness ("flourishing") as being associated with the spiritual and mystical concepts of self-transcendence and higher purpose.[6] And yet, the mental wellness field, the wellness movement overall, and the fields of psychology and psychiatry have all tended to distance themselves from questions of spirituality and religion. This relationship has become even more challenging as our modern era increasingly demands scientific evidence that different health and wellness practices are effective – a movement that is antithetical to the very nature of spirituality. Many aspects of mental wellness are subjective and existential, and they may never be "proven" to the satisfaction of those who are wedded to the existing methods of scientific inquiry.

Mental wellness products, services, and experiences permeate the entire economy.

Earlier in this report (*Chapter II, Figure 4*), we illustrated the multi-dimensional and holistic nature of mental wellness and summarized the various pathways that can help us build resilience, cope with life's challenges, and work toward a flourishing life. The scope of these mental wellness pathways is wide-ranging, and businesses across the entire economy (not only within the wellness industry) play a role in delivering products, services, and experiences that can support mental wellness. The reach of mental wellness is wide: boutique fitness studios that help people de-stress and connect with a social community; tour operators that offer yoga and meditation retreats; mattress companies that promote better sleep; real estate developers and urban planners that incorporate biophilic design and green space into neighborhoods and workplaces; makerspaces that provide a physical location, tools, and collaborative community for building and creating; pet rescue and pet therapy organizations that help us relax and heal with animals; spiritual and religious mobile apps that provide daily readings or reminders for prayer and gratitude. Mental wellness pervades throughout the entire economy because every aspect of our daily lives can have a profound impact on our mental wellness.

Four sectors are coalescing into an emerging mental wellness industry.

In this chapter, we narrow the focus from all of the beneficial mental wellness practices and pathways to the businesses that provide products, solutions, and experiences to consumers specifically for their mental wellness. We define the mental wellness industry as follows:

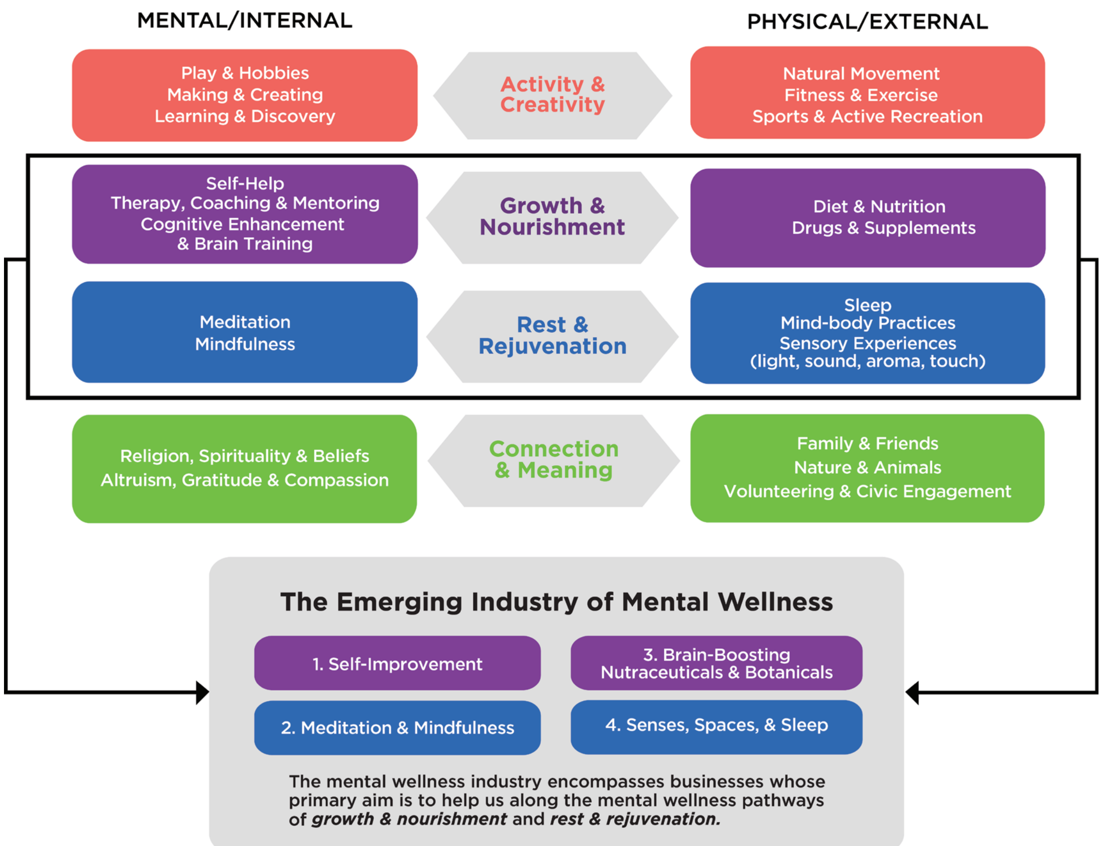
> The mental wellness industry encompasses businesses whose primary aim is to help us along the mental wellness pathways of ***growth and nourishment*** and ***rest and rejuvenation***.

To delineate the mental wellness industry, we focus on two pathways: **growth and nourishment** and **rest and rejuvenation**. We do not include **activity and creativity** in the industry because the category is too broad (fitness, sports, learning, hobbies), and it already sits solidly in other industries; we also exclude **connection and meaning** because these activities are primarily non-commercial (religion, gratitude, altruism, friends, nature, civic engagement). Our definition of the mental wellness industry is based on our overall wellness economy framework and is consistent with our understanding, definition, and measurement of other wellness industry sectors (see *Figure 8*). Within the **growth and nourishment** and **rest and rejuvenation** pathways, four sectors are coalescing into an emerging mental wellness industry (see *Figure 6*):

1. **Self-improvement;**
2. **Meditation and mindfulness;**
3. **Brain-boosting nutraceuticals and botanicals;**
4. **Senses, spaces, and sleep.**

Figure 6

Pathways to Mental Wellness



Source: Global Wellness Institute

Delineating the Mental Wellness Industry and Its Subsectors

The identification of these four subsectors as part of the mental wellness industry is based on the following criteria:

- They include wellness practices, products, and services that are widely recognized and understood by consumers as being associated with mental wellness (e.g., meditation, self-help, coaching).
- They include products and services that are proactively positioned, marketed, and branded by businesses as specifically targeting aims such as reducing stress, building resilience, improving sleep, preventing cognitive decline, and other mental wellness-enhancing benefits (e.g., sleep apps, brain training, sound baths, stress-reducing candles, stress toys).
- They include many products and services that are not already defined and classified as being part of other wellness economy sectors within GWI's framework (although there is some overlap between the mental wellness industry and other wellness industries, as noted later in this chapter).
- They *do not* include products and services that may be very beneficial for mental wellness, but whose primary purpose is something else (e.g., fitness, healthy foods, arts and literature, going to church, pets).
- They *do not* include products and services that sit in the medical or clinical arena (e.g., psychotherapy, sleep labs).

The four mental wellness industry subsectors are defined below. These subsectors are explored in greater detail in *Chapter V*.

1. Self-improvement:

Includes a wide range of activities, services, and experiences that are typically associated with self-help and personal development; these are delivered via many different channels and platforms, and can be done individually, in groups, and with professional guidance and support. **Self-help books** have long been the bedrock of this sector (including print, e-books, and audiobooks) and continue to be a major spending category with steady growth. **Self-help gurus, organizations, and institutes deliver a variety of classes, workshops, seminars, and retreats** that people pay to attend, both in-person and online. Some people seek out support through **self-help organizations and mutual support groups**, although many of these groups go beyond mental wellness and overlap into the mental illness, recovery, and clinical arena, as well as weight loss, parenting, religion, and other spheres (e.g., Alcoholics Anonymous, Recovery International, GROW, TOPS, etc.). Many people seek out professional support via **personal and life coaches**. Others may pursue professional **therapy or counselling** to support their mental wellness (although we do not include these in our market size measurements because they are part of the clinical arena). **Cognitive enhancement and brain training** is a small but growing niche that extends from dementia prevention to brain hacking, and it is delivered via professional clinics; online platforms and apps; high-tech gadgets; and low-tech books, puzzles, games, and toys. A dizzying array of **apps and online platforms** now offer self-help advice; guidance on developing healthy habits; digital journaling, gratitude, and daily affirmations; brain and memory-enhancing games and puzzles; digital coaching; and digital therapy. **Anti-loneliness efforts** are a new niche within self-help, with a growing number of organizations, online platforms, and apps emerging to help people connect with one another (both in-person and virtually).

Self-improvement is becoming increasingly challenging to quantify as an industry subsector because it permeates throughout other sectors, and so its scope extends far beyond what can be measured in dollar figures. For example, most apps are hard to classify as simply "self-help" because they overlap with meditation and mindfulness, sleep, fitness and weight loss, and the psychotherapy and clinical sphere. Expenditures on self-help books may only represent a fraction of the true market size, because the genre is no longer confined to the self-help bookshelf and now appears in social science, business, memoirs, and other genres (see *Appendix C*). Self-help gurus and personalities now deliver their advice and content through a variety of media channels (e.g., Instagram, YouTube, websites, magazines, TED talks, streaming channels such as Netflix, podcasts), which cannot be measured as a consumer spending category. Likewise, thousands of self-help and mutual support groups operate on online and social media platforms that are not quantifiable in terms of expenditures.

2. Meditation & mindfulness:

Includes all forms of meditation practice, and related and spin-off mindfulness practices (e.g., breathwork and breathing methods, guided imagery, body scan, relaxation exercises, etc.), as well as the many products and services that support these practices. It is critical to keep in mind that millions of people practice meditation worldwide (one estimate says between 200 and 500 million[7]), but only a small fraction of these people actually spend any money on the practice. Some people spend money on **classes, teachers, retreats, online platforms, apps, books, and videos** that provide instruction or guide them through a meditation practice, including: 1) in-person classes (in dedicated meditation studios, yoga studios, fitness centers, and many other venues); 2) workshops and retreats (held in ashrams and retreat centers, in tourism and hospitality settings, etc.); 3) apps, streaming services, and online classes and workshops; and 4) books, videos, and other media.

Meditation accessories include cushions, blankets, mats, benches, and chairs; beads, statues, prayer wheels, alters, and crystals; and sound and aroma products (e.g., incense and burners, candles, singing bowls, bells, chimes – which overlap with the *senses, spaces, & sleep* subsector). A wider and growing market of **mindfulness products** includes journals, coloring books, jewelry, and many other consumer products. In addition to apps, the tech sector offers an exploding array of **connected gadgets, trackers, monitors, headsets, and aids** to support meditation (e.g., headbands, headsets, glasses, wearable sensors, lamps, etc.), many of which build upon biofeedback, neurofeedback, and virtual reality technologies. Note that meditation and mindfulness techniques are increasingly used in therapy and medical settings (e.g., mindfulness-based stress reduction, mindfulness based cognitive therapy) – these activities could also be considered part of this subsector, although we do not explicitly include them in our market size estimates (which focus on consumer, non-clinical expenditures).

3. 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. This subsector embraces the gut-brain axis and the growing recognition of the deep connections between food, nutrition, and brain health. While a healthy diet is essential for mental wellness, we do not measure all healthy foods in this subsector. Rather, we focus on several product categories that specifically claim to support brain health, better sleep, memory, energy, and overall mental wellness. A number of **natural supplements, herbals and botanicals, and traditional remedies** are believed to have benefits for memory, attention, mood, and sleep (e.g., St. John's Wort, ginseng, ginkgo biloba, Omega-3 fatty acids, valerian root, melatonin), although the scientific evidence behind many of these claims is spotty.[8] The food industry markets a wide range of **functional foods and beverages** that claim to have brain health benefits, such as products that have naturally occurring or are enhanced with key ingredients like DHA, choline, L-theanine, taurine, guarana, ginseng, and caffeine. These appear in nearly every packaged food and beverage category, including waters, teas, juices, milks, yogurts, bars, chocolates, gums, mints, and much more.[9]

Recent years have brought growing interest in the potential of **cannabis, psilocybin, and other plant-based and synthetic psychedelic drugs** (e.g., ayahuasca, peyote, ketamine, MDMA, LSD)[10] for both mental wellness and medical purposes. We focus on cannabis in our market size estimates for this sector (specifically legal, over-the-counter/recreational cannabis and its derivatives), because the other drugs are mostly illegal around the world and/or are primarily being decriminalized and studied for treatment of mental illness or other medical uses, but not for recreational or self-directed wellness purposes. Psychedelic-assisted therapy is under study for treating conditions like PTSD, anxiety, and depression (however, these activities are very new, very small, primarily clinical, and we do not measure them in our market figures). A growing number of supplements and functional foods and beverages incorporate cannabis, hemp, CBD, THC, and medicinal mushrooms, although the legality of such products is often unclear. Cannabis and psychedelic retreats are a small but growing niche in the travel sector, in destinations where these activities are legal.

Note that many of the botanicals, supplements, and functional foods/beverages included in this subsector are recognized as *nootropics* (i.e., cognitive enhancers, or substances that can boost brain performance). However, the category of nootropics is very broad and includes not only botanical extracts/supplements but also addictive substances and stimulants (nicotine, caffeine), synthetic compounds (piracetam, noopept), and prescription drugs (Ritalin, Adderall).[11] Our market size estimates for this sector do not include all nootropics, because we do not consider synthetic drugs and off-label use of prescription drugs to be part of the wellness industry.

4. 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. **Sound** offerings include sound-healing and relaxation experiences and instruments (e.g., sound baths, gongs, chimes); products that address noise pollution/disruptions and related stress (e.g., white noise and sound machines, noise reduction gadgets); and even an emerging field of "wellness music."[12] **Scent** offerings include aromatherapy products/services and essential oils used for relaxation and stress relief, as well as a large sector of home fragrances that are marketed for calm, comfort, coziness, and mood enhancement (e.g., candles, diffusers, mists, etc.). **Light**-related products are expanding rapidly, partly based on better scientific understanding of our circadian cycles.[13] These include circadian or human-centric lighting solutions, as well as a wide range of light therapy devices used by consumers at home (for mood, sleep, etc.), as well as in medical and treatment settings (e.g., light boxes, light visors, dawn simulators, etc.). Many popular products and fads target our sense of **touch**, including weighted blankets for relaxation, an endless array of stress toys and gadgets (e.g., stress balls, fidget spinners, worry stones, desk toys), and new high-tech sensory wristbands and wearables. **Multi-sensory experiences** are appearing in wellness travel, spas, fitness, and entertainment venues, including forest bathing, hugging therapy, scream therapy, laughter yoga, cuddle parties, flotation tanks, and more.

Sleep is a large and rapidly growing market sector that overlaps with sensory products for promoting relaxation and improving our sleep environment (e.g., lighting, white noise, noise cancellation, weighted blankets, room-darkening window coverings, temperature control devices, etc.). It also includes tech-based products (e.g., sleep monitors and trackers, sleep ambience gadgets, sleep and jet lag apps, smart bedding); sleep accessories for home and travel (e.g., eyeshades, travel pillows); and sleep improvement services (e.g., books, counseling, retreats). Napping is a growing niche that includes nap bars and cafés, as well as nap pods placed in workplaces, hospitality, and travel spaces. Note that the broader sleep market also encompasses mattresses, bedding, pillows, and furniture, but we only include smart beds, mattresses, and pillows in our market size estimates (i.e., products that use technology to enhance sleep and wellness). There is also a large clinical sector of sleep services, diagnostics, and devices (e.g., sleep labs, CPAP devices, etc.), but these are in the medical space and are not included in our measurements.

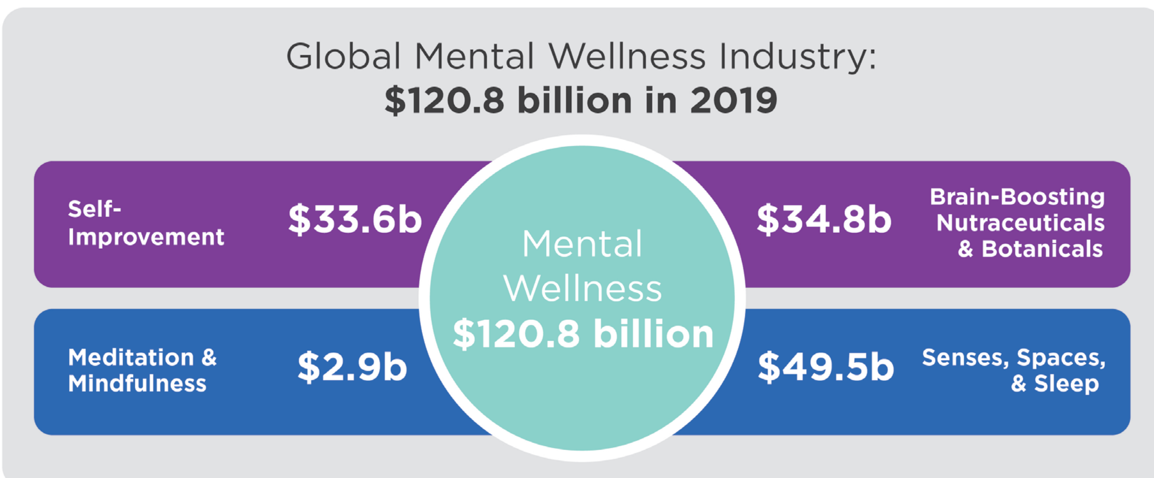
Finally, this mental wellness subsector includes **physical spaces**, because sensory, stress-reducing, and mental wellness-enhancing products and solutions are increasingly being incorporated into the design of our homes, workplaces, and travel destinations. These include sound-proofed windows and circadian lighting to reduce stress and promote better sleep, as well as biophilic design, natural light, fresh air, and plants to promote calm and connection to nature. These elements overlap with the wellness real estate industry – and not all of them can be easily measured from a market size perspective – but it is critical to recognize the deep connections among senses, sleep, and spaces in relation to our mental wellness.

Mental wellness is a $121 billion global market.

We estimate that the global mental wellness industry was worth $120.8 billion in 2019. This figure represents consumer expenditures on the four subsectors that we identified and described above, and it focuses on proactive, wellness-focused, consumer- and private sector-driven activities (that is, things outside of the psychiatry, psychology, and clinical/medical spheres). These figures are broad, global estimates that we aggregated based on a wide range of secondary data sources.[14]

Senses, spaces, & sleep is the largest subsector (at $49.5 billion), followed by *brain-boosting nutraceuticals & botanicals* ($34.8 billion) and *self-improvement* ($33.6 billion), which are similar in size (see *Figure 7*). *Meditation & mindfulness* is the smallest subsector, at $2.9 billion; it is important to keep in mind that millions of people around the world practice meditation, but only a small fraction of them spend any money on the practice.

Figure 7



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

How to interpret these numbers.

Our methodology requires us to measure a full year's economic activity related to an industry, and therefore we must look back to the most recent calendar year (2019). In most instances, the prior year's figure provides a useful datapoint that can be viewed on a trajectory of growth or decline. Due to the COVID-19 pandemic, 2020 has been an unprecedented year of massive global economic upheaval and uncertainty. Most economists, industry analysts, governments, and corporations are struggling with collecting and processing real-time data to assess the current situation and to respond effectively. In this landscape, the mental wellness industry figures presented above can serve as a 2019 baseline on which to anticipate the future. Amidst the current uncertainty, several macro-level forces will impact the future growth and development of the mental wellness industry:

- The human suffering and economic dislocations caused by COVID-19 have negatively impacted our mental health and well-being, and therefore have increased demand for various mental wellness pathways and solutions on a global scale. Companies in some segments have reported upticks in demand, such as meditation apps,[15] functional foods and beverages and brain supplements (as consumers become more concerned with their health and immune systems),[16] and candles and diffusers (increasing comfort and calmness at home).[17]
- Some tech sector companies have been "winners" during the pandemic, as consumers turn to apps, digital interfaces, virtual meetings, and contact-free solutions under physical distancing and social isolation measures. However, it is unclear if all of this COVID-19-induced behavior will stick for the long-term, or the extent to which people will revert to physical, face-to-face, and in-person interactions and activities when they become feasible again.[18]
- By all estimates, global economic activities and consumer confidence have taken a severe hit in 2020, and consumer spending is shrinking across many industries.[19] A decline in disposable income affects all consumer sectors and services, including those in mental wellness. To the extent that consumers increasingly see mental wellness as a need and not a want, it may take up a growing portion of the consumer spending pie, even when the overall pie is shrinking.
- All around the world, inequality of income and wealth is rising. Unfortunately, this trend may have been accelerated by COVID-19, with the rich enjoying rising wealth (in the form of investment returns) as they spend less (on travel, recreation, and luxury services and goods) and save more. Meanwhile, the poor and working class are losing their jobs and incomes on a massive scale, while the middle class is simply trying to hang on to their status quo. This bifurcated world has persisted in the economy for some time (and especially in wellness industries), with luxury segments catering to a small portion of high-income consumers, and other affordable segments targeting the "mass" middle class. The future opportunities and prospects for businesses will depend upon how they provide value to their targeted consumer segments. Some businesses may also face expanded competition from free services and activities that people have learned to do on their own (e.g., meditating at home without using an app), as well as free and affordable services that are increasingly being offered by communities, nonprofits, and governments as we realize the importance of making mental wellness available for all.

In understanding and using these new market figures, it is also important to recognize several important characteristics of the mental wellness industry:

- Mental wellness is an emerging market sector, and this report represents the first attempt to define mental wellness as an industry. Here, we only include the products and services that are most closely associated with the emerging business of mental wellness, but the importance and scope of mental wellness extends far beyond the four subsectors we include in this new industry sector.
- By singling out four subsectors, we are not implying that these are the most important or most effective practices for pursuing mental wellness. They are simply the practices that are most closely and proactively identified by businesses and consumers as being related to mental wellness. There are many things we can and should do to support our mental wellness that are not a business opportunity and do not require spending money (like spending time in nature, joining a spiritual community, or listening to music).
- As an emerging sector, many mental wellness practices and products have not yet accumulated extensive clinical evidence when compared to the conventional medical and mental health industries (e.g., drugs that treat mental disorders), which have benefitted from decades of pharmaceutical industry investments and clinical research. Currently, the regulation of most mental wellness

businesses is fragmented, especially in the *brain-boosting nutraceuticals & botanicals* sector. It is generally left to consumers to determine whether they believe in and find benefit from these products and services or not. However, a body of evidence is quickly growing – especially for some modalities, like meditation, light therapy, and circadian science – bolstered by an acceleration of public and private research investments. Meanwhile, consumers also need to be educated on the importance of basic healthy habits (exercise, sleep, healthy eating, human connections) for their mental health and well-being.

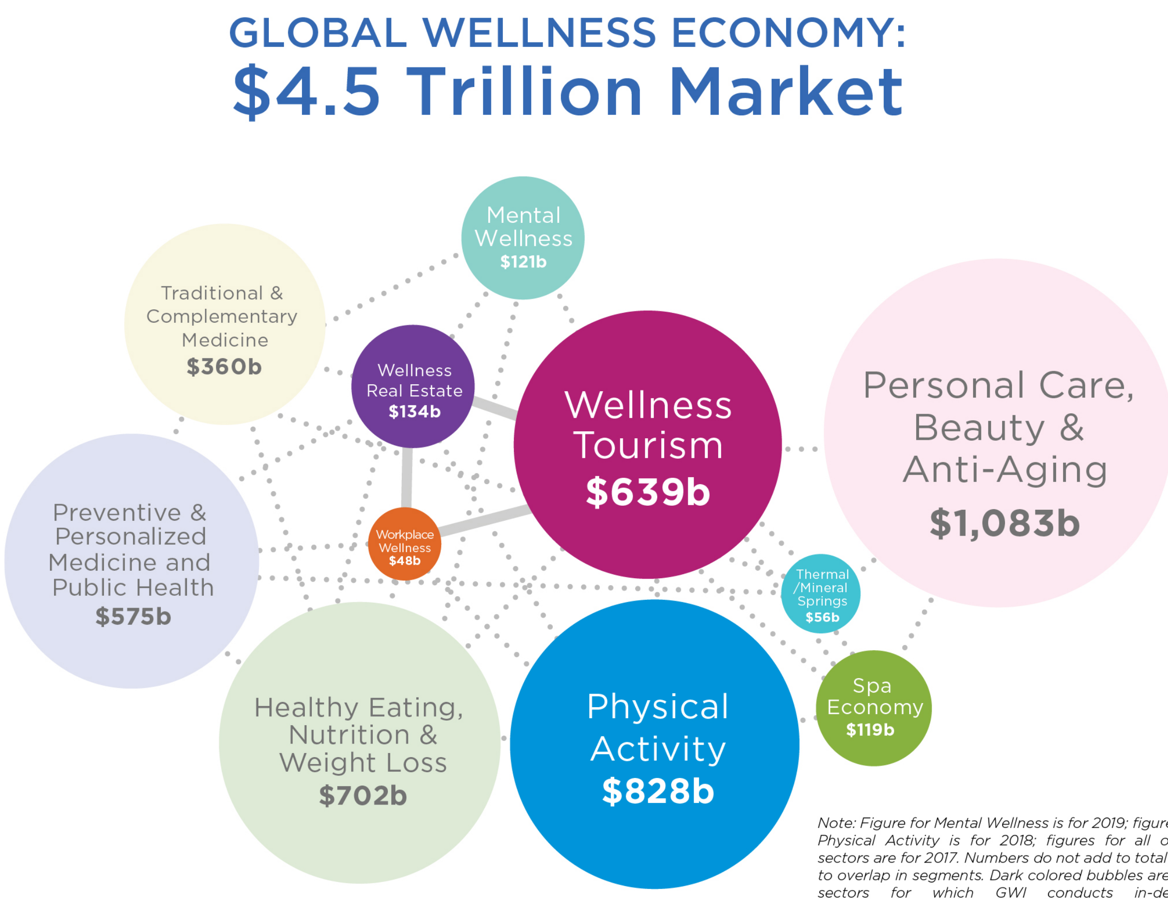
- The boundaries across the four mental wellness subsectors are not rigid or clearly defined. For example, a mindfulness workshop or retreat would fit into the *meditation & mindfulness* subsector, while a life coach could also provide guidance on mindfulness practices (which fits in the *self-improvement* subsector). Sound healing and aromatherapy products (e.g., gongs, chimes, incense, candles) fit in the *senses, spaces, & sleep* subsector, but are also often used as accessories for *meditation & mindfulness*. Likewise, many of the apps in the mental wellness space provide a mix of services that defy easy categorization, including meditation, mindfulness, sleep hygiene, self-help practices, gratitude, journaling, and even therapy.
- Technology is not a standalone segment within the mental wellness industry, but is pervasive across all subsectors (as described in detail in *Chapter V*). Mental health and mental wellness tech startups have become a major target for investors, receiving massive amounts of funding. Investment levels reached $750 million in 2019, a five-fold increase over 2014, while funding has topped $1 billion in the first half of 2020.[20] These figures indicate that the perceived growth potential of this segment is huge. An important development is the merging of traditional mental health solutions with mental wellness technology platforms to provide preventive and supplemental care, and some businesses may be seeking to access the resources of a much larger healthcare market, beyond consumer discretionary spending on mental wellness.[21] Finally, these investment figures reflect flows of startup capital and are not included in our market size figures for 2019 (which measure consumer expenditures).

Mental wellness is a new "industry bubble" within the Global Wellness Economy framework.

The *Global Wellness Economy Monitor*, first published by the Global Wellness Institute (GWI) in 2014, defines and measures the size of the wellness economy worldwide. **The wellness economy encompasses industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives.** To date, the wellness economy has included ten industries, which we estimated at $4.5 trillion in 2017/2018.[22] With a growing share of consumers embracing wellness as a dominant lifestyle value, the wellness economy has become ever more dynamic and pervasive in all aspects of our lives. Emerging consumer needs drive business and technology innovations and create new sectors, and mental wellness is just a such a sector.

In defining and measuring mental wellness as an industry for the first time, we are now adding *mental wellness* as the 11th industry sector within the wellness economy (see *Figure 8*). This is a significant addition to our framework, capturing an important set of economic activities that were not previously included in our wellness economy measurements (in particular, meditation and mindfulness, self-improvement, sensory products and services, and sleep).

Figure 8



Note: Figure for Mental Wellness is for 2019; figure for Physical Activity is for 2018; figures for all other sectors are for 2017. Numbers do not add to total due to overlap in segments. Dark colored bubbles are the sectors for which GWI conducts in-depth, country-level primary research. Light colored bubbles are sectors for which GWI aggregates global estimates only, drawing from secondary sources.

Source: Global Wellness Institute

Figure 8 combines data from 2019 (mental wellness), 2018 (physical activity), and 2017 (all other sectors). Even though we value the mental wellness industry at $120.8 billion, we are not updating the $4.5 trillion figure for the wellness economy because we have not updated the figures for the other ten wellness sectors. In addition, about one-third of the mental wellness industry overlaps with other wellness industry sectors, such as the following:

- *Brain-boosting nutraceuticals & botanicals* entirely overlaps with two other wellness industries (*healthy eating, nutrition, & weight loss* and *traditional & complementary medicine*).
- Some products and services in the *senses, spaces, & sleep* subsector (e.g., circadian and human-centric lighting, biophilic design) overlap with *wellness real estate*.
- Some products and services in the *senses, spaces, & sleep* subsector (e.g., sound healing, gong baths, aromatherapy) overlap with offerings in the *spa* and *wellness tourism* industries.
- Travel and retreats for *meditation & mindfulness* and *self-improvement* also overlap with *wellness tourism*.

As mentioned earlier, the COVID-19 pandemic has brought unprecedented challenges to the whole world, affecting every aspect of human welfare, our society, and the global economy. It is crucial to examine how the wellness economy has evolved since we last published figures for 2017/2018. An update of the global wellness economy will be the subject for GWI's upcoming research study in 2021.

Endnotes

[1] See: Ingram, M. (2020). *Retreat: How the Counterculture Invented Wellness*. London: Repeater Books.

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V. Mental Wellness Industry Subsectors

Self-Improvement	$33.6b market size

Businesses in this subsector

Services

- Coaching
- Cognitive training
- Self-help advice, gurus & speakers (delivered via books, media & other platforms)
- Self-help classes, workshops, seminars & retreats
- Self-help organizations & support groups
- Holistic/personal development institutes & retreat centers
- Anti-loneliness organizations & nonprofits*

Products

- Self-help books (print, e-books, audiobooks)
- Brain training books, puzzles, games

Tech

- Self-help apps & online platforms
- Anti-loneliness/connection apps
- Brain training apps & games
- Brain stimulation consumer tech
- Neuro toys

* *Not included in the market size number for this subsector. See Chapter IV for more details.*

Sample companies & market innovators

Self-Help Gurus & Personalities

- Tony Robbins
- Deepak Chopra
- Oprah Winfrey
- Esther Hicks
- Mark Manson
- Brené Brown
- Tim Ferriss

Self-Help Organizations & Institutes

- Esalen Institute
- Omega Institute
- Alcoholics Anonymous
- GROW
- Recovery International
- TED Foundation

Self-Help, Coaching, & Therapy Apps

- Fabulous
- MakeMeBetter
- Habitica
- Remente
- Shine
- Jour
- Coach.me
- Woebot
- Youper
- WellTrack
- Turn2Me
- 7 Cups of Tea
- BioBeats
- HelloMind

Brain Training

- Peak
- Luminosity
- Elevate
- AudioJoy
- GEIST
- CogniFit
- LIFTiD
- Amen Clinics

Anti-Loneliness Apps & Tech

- Meetup
- Patook
- Houseparty
- Mon Ami
- Rendever
- EllieQ
- PARO

Background & Evolution

The concept of seeking help for self-improvement is rooted in ancient literature, philosophy, and religion.

- The idea that we can learn to become a better version of ourselves has its origins in the ancient genre of "wisdom literature." Many works by the greatest thinkers and philosophers in history (Socrates, Plato, Machiavelli, Confucius, Sun Tzu, Rumi) provided maxims and guidance on virtue, divinity, the meaning of life, social norms, and practical advice on living – wisdom that remains foundational to self-help, mental wellness, and psychology today. The development of the printing press launched the modern era of the self-help book. From the 1600s to the 1800s, "conduct books" proliferated across the Western world, teaching men about ambition, self-reliance, and success, and advising women on domesticity, marriage, parenting, and "female virtues." Samuel Smiles' bestselling *Self-Help* (1859) is credited as being the first true "self-help" book, coining the term "self-help," and launching the genre in the modern publishing industry. A number of self-help bestsellers appeared in the early 20th century, such as Dale Carnegie's *How to Win Friends and Influence People* (1936) and Norman Vincent Peale's *The Power of Positive Thinking* (1952). Alcoholics Anonymous was founded in 1935, marking the beginning of the group-based self-help and recovery movement.
- The concepts of coaching and mentoring also have ancient roots. Sports coaching originated in ancient Greece, when athletes were supported in gymnasiums by elite former champions. The first recorded mention of a "mentor" appeared in Homer's *Odyssey*, describing a wise and trusted advisor or friend. The word "coach" was first applied to a person in the 1830s, when students at Oxford University used it as slang for the tutors who helped them toward their goal of passing exams.

The self-help industry emerged with modern psychology and the New Age movement, and was ushered into the mainstream by gurus and celebrities.

- The 1960s and 1970s (the "Me Decade") marked the take-off of the self-help industry, as the narratives of recovery, self-care, and self-actualization started to permeate mainstream culture, and as self-help began to embrace mysticism, spirituality, and psychology. The popularity of self-help surged into the 1980s-1990s, and it became increasingly driven by gurus and the media, People started to replace priests, therapists, and doctors with media celebrities, writers, and gurus, who dispensed their advice in the form of books, TV shows, and infomercials.
- In the mid-20th century, executive coaching began to permeate business culture, as business executives looked to psychology to improve their performance and productivity. Interest in coaching continued to grow with new developments in the psychology field, such as Martin Seligman's concept of positive psychology. Since the 1990s, coaching has become a recognized discipline, with professional associations, peer-reviewed journals, training programs, and university courses all over the world. As people turn to coaching to boost self-esteem and confidence, it has expanded from the business arena into all areas of life – e.g., leadership coaching, team coaching, career coaching, life coaching, personal development coaching, and relationship coaching. The International Coach Federation estimates that there were 71,000 coach practitioners worldwide in 2019.[1]

- In recent years self-help has become one of the most lucrative genres in the book publishing industry, with approximately 150 new titles published every week.[2] The self-help genre has permeated into other book genres (social science, natural sciences, business, memoirs, etc.), which widens the credibility, application, and appeal of the concept. While the majority of consumers for self-help books and advice are female, men are increasingly attracted to self-improvement in the guise of seeking professional, leadership, business, health, and mental wellness advice. Some major publishing houses are rebranding the category as "self-improvement," "personal development," and "mind-body-spirit" to expand its appeal among Millennials and a new generation of consumers.[3] The rising interest in self-improvement and self-transformation is a global phenomenon. While the most developed markets are in North America and Europe, the Asian markets are expected to grow rapidly, especially in China, Japan, and India, as well as in Latin America and the Middle East.

Developments to Watch

Technology and media platforms will continue to expand the mass market for self-improvement.

- The Internet, social media, apps, and other media platforms are rapidly diversifying the ways in which consumers can access self-help advice and solutions, either for free or bundled in cable TV and streaming subscription services – e.g., blogs, podcasts, TED talks, Netflix, YouTube, etc. Some of the top motivational speakers offer their own apps, and many people pay for online courses, live webinars, and other proprietary content offered by their favorite gurus and personalities.[4] While established self-help celebrities (Oprah, Tony Robbins, Deepak Chopra, etc.) continue to dominate the market, YouTube self-help channels (e.g., Tedx Talks, Be Inspired, School of Life), social media (Twitter and Instagram), podcasts, and other platforms have helped to propel unknown motivational coaches to stardom, bringing a wider array of self-help messages to a larger, more diverse, and global audience.
- Self-improvement and self-help apps are exploding (in 2018 Apple named "self-care" its app trend of the year[5]). These apps provide a wide range of self-improvement advice, aids, tools, motivation, and tracking, and they are often combined with meditation, mindfulness, journaling, healthy eating, daily affirmations, seminars, coaching, therapy, and other mental wellness and general wellness practices. Some apps focus on helping users form new habits or work on specific goals (e.g., Fabulous, Happify, MakeMeBetter, MotivateMe, HabitBull). Some draw upon tools from psychology like cognitive behavioral therapy (e.g., What's Up, Mood Kit, WellTrack), and some use gamification (e.g., Habitica, SuperBetter, FOCUS On the Go!). Digital journaling apps, such as Day One and Jour, try to capture users' attention and improve motivation with reminders, prompts, and beautiful formats. Technology also helps to make formerly one-on-one services such as coaching and therapy more accessible, by providing a combination of AI-assisted interaction and options to connect with human coaches (e.g., Coach.me, Woebot).
- Since the founding of Alcoholics Anonymous in 1935, thousands of group-based self-help and mutual support organizations have emerged around the world to help people deal with addiction, bereavement, trauma, anxiety, stress, weight-loss, chronic disease, and other challenges. Most of these groups sit in a grey area between mental illness, mental wellness, and general wellness. In the last decade, many well-established self-help groups have started offering online meeting options, while a host of new online-only self-help communities have emerged. Online self-help platforms offer both group and one-on-one support, often moderated by trained volunteers and paid professionals, and even online therapy and counseling – for example, Turn2Me, 7 Cups of Tea, The Tribe, Daily Strength, Wisdo, and The Dinner Party. Even social platforms like Facebook and

Reddit are a major medium for grassroots online self-help groups and support. A growing number of online groups target marginalized communities and those underserved by conventional mental health resources (BIPOC, LBGTQ+, etc.), such as Therapy for Black Girls, Sista Afya, QTPoC Mental Health, Trevor Space, Asian Mental Health Project, etc.

Self-improvement narratives and wellness practices are converging, ushering in the golden age of self-transformation.

- While the need and desire for self-improvement have always existed, there have never been so many options available to access the advice of well-established gurus, celebrities, journalists, academics, and emerging influencers – who deliver promises to transform us into the best version of ourselves (i.e., healthier, happier, more successful, more fulfilled, and even more enlightened). Self-transformation and wellness are converging, as people recognize the holistic nature of their being and of their lives. No wonder it is difficult to pinpoint what type of advice gurus such as Oprah, Gwyneth Paltrow, Tony Robbins, Deepak Chopra, or Marie Kondo are dispensing: is it health, relationship, happiness, self-esteem, housekeeping, fitness, weight-loss, personal finance, career, or spiritual guidance?
- The tentacles of self-improvement and mental wellness are extending into all facets of life and personal transformation, from travel and festivals, to gyms and coffee shops. In addition to celebrity and popular mega events like Coachella, Burning Man, and Wanderlust, smaller retreats, programs, and classes are increasingly integrating mental wellness practices into personal development and transformational experiences. Chōsen, for example, offers self-exploration workshops and retreats for high-performing individuals by leveraging expertise in functional well-being, psychology, and elite athletics. Digital detox retreats and workshops have been on the rise in the wellness tourism and spa sectors, helping people to cope with their technology-related stress by taking time away from it. In urban areas, popular consumer hangouts like coffeeshops and gyms are developing mental wellness and stress relief offerings – such as "stress cafés" and "nap cafés" in Seoul, anger rooms like Toronto's Rage Room and New York's Wrecking Club, or Taryn Toomey's boutique workout "The Class" in New York City (which incorporates screaming).[6] Iceland's latest tourism marketing campaign, "Looks Like You Need to Let It Out," responds to widespread COVID-related stress and encourages people to virtually scream into beautiful Icelandic landscapes.[7]
- As self-improvement converges with wellness, new products and services are emerging to provide integrated and holistic solutions that include diet, fitness, relationships, and mental health in a one-stop shop (e.g., life coaching and motivational apps like Remente, Motivate, Lifehack). For example, the Fabulous app markets science-based approaches to help users address multiple concerns by changing behavior and building healthy habits. The Pacifica Neuroscience Institute has created a Cognitive Fitness Studio program that incorporates both physical exercise and cognitive stimulation for improved brain health. The GEIST brain training app works on memory and logic, but also incorporates more meditative techniques to calm the mind. In her wildly popular MOOC course *The Science of Wellbeing*, Yale University's Dr. Laurie Santos draws on scientific evidence to suggest a variety of techniques and pathways to help people become happier.

New and creative types of self-help organizations, apps, and technologies are combatting our growing crisis of loneliness and isolation.

- In response to the rise in loneliness and social isolation – and growing awareness of its many negative impacts on our physical and mental health – new types of organizations are emerging to help people connect with one another, targeting both younger people and seniors. In Denmark, Ventilen brings together lonely 15-25 year olds with volunteers for regular activities and outings to build human connection, and it has identified 21 venues across the country where young people looking for companionship can meet up.[8] In the UK, The Big Lunch brings together millions of neighbors for a community meal once per year. A number of countries have developed free phone helplines that provide friendship, conversation, and advice for seniors, such as The Silver Line (UK), Friends of the Elderly (Ireland), Friendly Phone Program (Canada), and FriendLine (Australia). In the United States, the Village Model helps seniors to age-in-place by connecting them with companions, volunteers, and social activities in their neighborhoods.[9] Japan has a unique industry of "rent-a-family" agencies (e.g., Family Romance, Client Partners) that help lonely people hire companions who can take the place of relatives or provide companionship.[10] Based on growing evidence that social laughter can reduce stress and boost well-being, laughter yoga combines yoga breathing with laughter exercises; the movement has spawned over 20,000 free social laughter clubs across 110 countries.[11] Another unusual trend developing around the world is "cuddle parties," where strangers can meet for an evening of platonic cuddling, human touch, and hanging out.[12]

- As an offshoot of the dating apps industry, a growing number of apps help people make new friends and get to know their neighbors (e.g., Meetup, Patook, Friender, Bumble BFF, NextDoor), or even rent a friend for a day (e.g., RentAFriend). Apps like Houseparty and Teleparty (formerly Netflix Party) facilitate virtual activities, like games or movies, with friends – things that have become much more popular during the COVID-19 pandemic. Some companies are using VR technologies to create shared virtual experiences that combat isolation (e.g., Alcove VR, Rendever). Some apps, like Papa and Mon Ami, focus on facilitating in-person connections for seniors. Other companies are using new robotics technologies to develop AI-driven digital companions and caregivers for seniors, such EllieQ, PARO, SAM, and Zora.[13]

Anti-self-help is a new form of self-help.

- As the narrative of self-improvement becomes pervasive, it has generated a unique form of backlash – the anti-self-help movement.[14] A new genre of anti-self-help books question the philosophy of self-help, whether it is really helping people solve their problems, or whether it is even harmful (e.g., Brinkmann's *Stand Firm: Resisting the Self-Improvement Craze*; Cederstrom and Spicer's *Desperately Seeking Self-Improvement*; Manson's *The Subtle Art of Not Giving a F*ck*). Similar sentiments have been expressed in the anti-happiness movement, essentially rejecting the notion that it is always in our power to improve ourselves and our lives, when so much is beyond our control. Rather than turning people away from self-help, the anti-self-help movement has engineered its own messaging and advice, such as: be negative, accept mediocrity, or stop caring. Authors and speakers like Mark Manson have risen to fame by suggesting that if people stop caring about self-improvement, they will become happier. Marisa Peer's Rapid Transformational Therapy uses hypnotherapy to teach clients that "they are enough." Ironically, anti-self-help – and a shift from self-improvement to self-acceptance – has become the latest self-help message.

With brain maintenance and brain hacking gaining consumer interest, more rigorous research and evidence will be needed to back up the claims made by businesses.

- Self-improvement also has a physical dimension, in its connection to the brain. Concerns with mental function extend from prevention and maintenance to enhancement and optimization. On the one hand, longer lifespans around the world have brought growing concerns with memory loss, cognitive decline, and the risks of dementia and Alzheimer's disease. At the other extreme, there is growing interest among business and tech executives in how to enhance or maximize cognitive ability for peak mental performance. It is against this backdrop that games, apps, and programs that claim to enhance brain functioning have found a growing market in recent years. One study estimated that in 2018, people spent almost $2 billion worldwide on brain training apps such as Luminosity, Peak, and Elevate.[15] Many of these games and apps are marketed from the health/wellness and education angle, with a promise of better brain performance that can appeal to professionals and children, as well as seniors. New apps are bringing new technologies into the cognitive enhancement market – for example, AudioJoy and Hypnobox combine hypnosis with brain training, mental clarity, and relaxation. Brain training games are even available on video gaming platforms (e.g., Dr. Kawashima/Brain Age on Nintendo, Brain Challenge on Xbox). There is also growing interest in classes, studios, and centers (both online and in-person) that provide cognitive training to all age groups, some of which employ neurofeedback to enhance overall mental wellness or to address specific brain impairments (e.g., Amen Clinics, Pacific Brain Health Center, Emory University's MOOC *Biohacking Your Brain's Health*, or the online CogniFit Brain Training program).

- Too often, businesses are eager to make general claims of cognitive enhancement by using their products, without adequate proof of their efficacy for specific cognitive domains (e.g., memory, attention, processing speed, visuospatial skills, or executive functions), whether the results are temporary, or whether there may be side effects.[16] After Luminosity's 2016 settlement with the U.S. Federal Trade Commission for making misleading claims about cognitive improvement,[17] other companies have been more careful about their promises. For example, BrainHQ claims that it can help boost brain processing speed but not overall intelligence; Memorando targets working memory, a measurable goal; CogniFit focuses on specific cognitive impairments. Medical researchers and academic centers are increasingly collaborating with businesses to build better services and products with more rigorous scientific evidence behind them. For example, New York's Blum Center for Health partners with Field, a neuro technology company, to improve brain functioning.[18] Going forward, there will be more scrutiny from consumers, scientists, and regulators on the claims made by businesses with respect to brain maintenance, brain hacking, and brain enhancement.

Meditation & Mindfulness

$2.9b
market size

Businesses in this subsector

Services

- In-person classes & studios (meditation, mindfulness, breathwork, guided imagery, body scan, etc.)
- Apps, streaming services, & online platforms
- Retreats & workshops
- Institutes & training centers

Products & Accessories

- Books, videos, other media
- Meditation accessories (cushions, benches, beads, candles, chimes, etc.)
- Mindfulness products (journals, coloring books, jewelry, etc.)

Tech

- Meditation gadgets & aids (headbands, trackers, monitors, VR, etc.)
- Biofeedback & neurofeedback products & services*

** Not included in the market size number for this subsector. See Chapter IV for more details.*

Sample companies & market innovators

Studios/Centers/Teachers

- Inscape
- MNDFL
- MBSR (Jon Kabat-Zinn)
- Transcendental Meditation
- Art of Living Foundation
- Plum Village
- Heartfulness Institute
- Middle Way Meditation Institute
- Tara Brach
- Pema Chodron

Apps

- Calm
- Headspace
- Insight Timer
- Petit BamBou
- Buddhify
- Sattva
- Breethe
- Aura
- eMindful

Tech

- Core
- Muse
- Spire
- Breathe 2
- Mindlightz
- TRIPP
- iFeel Labs
- Healium
- Flow VR
- Mind Labyrinth VR Dreams

Background & Evolution

Meditation is an ancient spiritual tradition with roots in all major religions. Eastern gurus brought meditation to the West in the mid-20th century.

- The types of meditation and mindfulness that are widely practiced today are associated with Buddhism, although meditation actually originated in ancient Hindu texts (1500 BC) before it was adapted by Buddhists in China and India (600-400 BC). Lesser known is the fact that Judaism, Christianity, and Islam all have meditative traditions of their own that date from ancient times or the Middle Ages.

- Meditation and yoga were first introduced to Western audiences when Eastern spiritual masters and gurus traveled and migrated to the United States and Europe to give lectures and courses, and to establish communities of followers. In the 1960s-1970s, Maharishi Mahesh Yogi became the "guru to the stars," teaching celebrities like The Beatles and the Beach Boys to meditate and making "mantra" a household word. In the 1980s and 1990s, many high-profile celebrities and athletes embraced and popularized meditation and yoga (e.g., Michael Jackson, Madonna, Demi Moore, Donna Karen, Joe Namath, Phil Jackson, Deepak Chopra, Oprah). Meditation became hip, and it spread from hippie and fringe culture into the mainstream.

The Westernization and secularization of meditation and mindfulness is sometimes controversial.

- Secular, Western-style meditation and mindfulness emerged in the 1970s, when Jon Kabat-Zinn founded his Mindfulness-Based Stress Reduction Clinic at the University of Massachusetts Medical Center, bringing Buddhist meditation into medicine and Western science; secularizing it; and connecting it with self-improvement, personal growth, recovery, relaxation, and stress reduction. The spread of Transcendental Meditation (TM) in the West in the 1960s-1970s, alongside the rise of yoga as a fitness activity, have also driven the popularity of secularized meditation practices and the proliferation of mindfulness into business and all aspects of popular culture.
- The rise of secular forms of meditation and yoga have created many controversies among religious communities around the world. Conservative Muslim clerics in Malaysia and Indonesia (2008), Egypt (2004), and Singapore (1984) have issued various fatwas against the practice of yoga as "anti-Islam,"[19] while Saudi Arabia banned yoga until 2017. In the United States, many conservative Christians view meditation and yoga as "anti-God," or object to teaching mindfulness and yoga in schools as an intrusion of Eastern religion into education. India, the very birthplace of yoga, has also seen conflicts between Hindus and Muslims over the practice of yoga in schools and whether yoga is a religious activity. At the same time, the adoption of meditation and mindfulness by Silicon Valley and the corporate world as an employee wellness offering and productivity-boosting measure has been criticized as "McMindfulness," or the co-opting of Buddhist spiritual practices for capitalist and profit-making purposes.[20]

Interest in meditation has accelerated in recent years, as people of all ages search for ways to cope with stress and anxiety.

- Meditation practices have proliferated rapidly around the world in recent years. One estimate places the number of individuals worldwide who practice meditation at between 200 and 500 million.[21] In North America, meditation has become one of the most popular complementary health techniques. The U.S. National Health Interview Survey found a dramatic increase in the number of adults who practiced meditation (in the past 12 months), from 4.1% of respondents in 2012 to 14.2% in 2017.[22] Meditation use among U.S. children grew from 1.6% to 7.4% during this same time period.[23] Participation is growing across generational cohorts – from youth to middle age to older adults – indicating that interest in, and the need for, meditation cuts across age groups. Elsewhere, a 2018 study found that 26% of adults in the United Kingdom have made use of meditation in the last five years to improve their mental health.[24]
- Growing interest in meditation is fueled by rising stress, anxiety, and feelings of sadness or lack of happiness – and COVID-19 has undoubtedly increased stress and anxiety levels worldwide this year. People's reasons for meditating include general wellness, improving energy, and aiding memory or concentration. Many practitioners believe that meditation and mindfulness techniques have helped them to reduce stress, relax, sleep better, and enhance their emotional well-being.[25]

Developments to Watch

As evidence of their efficacy grows, meditation and mindfulness will be increasingly adopted as a key part of treatment and patient care in the medical and mental health fields.

- A growing body of research and a host of anecdotal evidence suggest significant benefits from meditation in the treatment of a number of health conditions, from pain management for cancer patients to brain function in Alzheimer's patients, as well as for many mental disorders such as depression, anxiety, post-traumatic stress disorder, and insomnia.[26] Research has found that various mental health treatments, such as cognitive behavioral therapy (CBT) and psychotherapy (talk therapy), work well when used in conjunction with mindfulness and meditation techniques.[27] Recognizing the links between mental health and meditation and mindfulness, public health and mental health professionals are increasingly encouraging patients to adopt these techniques as part of their treatment plans (e.g., UK's National Health Service, Mayo Clinic).

Mobile technologies and apps are accelerating consumer adoption of meditation and mindfulness.

- Mobile apps are a key driver behind the rapid consumer uptake of meditation and mindfulness. Companies such as Calm, Headspace, Insight Timer, Breethe, and 10% Happier have brought these modalities within easy reach, often by breaking down the practice into bite-sized, self-driven, and customized modules, and even infusing music, stories, soundscapes, and games (e.g., Happify, SuperBetter) to help with mindfulness, calming, and stress reduction. The ten highest-earning meditation apps received 57.4 million first-time downloads in 2019, a 26% increase over the previous year, and generated $195 million in spending.[28] While the app market is dominated by North American companies and consumers (e.g., Calm and Headspace, each with more than two million subscribers), there is substantial growth potential all over the world, with new entrants such as MindFi from Singapore rapidly gaining users.
- Some apps offer their users a combination of mental health, self-help, and meditation techniques, including CBT, journaling, motivational messages, and other mindfulness aides (e.g., Calmer You, Shine, Moodnotes). Others have launched digital mental health products, using chatbots and voice analysis to mimic talk therapy and promote meditation and regular mindfulness practices (e.g., Woebot).
- There are a number of challenges with the growth of app-based meditation and mindfulness, including questions about whether these apps are truly science- and research-based, whether they are preying on vulnerable populations for profit, and whether they are protecting users' data privacy.[29] Some question the use of tracking, gamification, push notifications, and social media sharing to promote a sense of calm and mindfulness. Other criticisms point out that meditation apps tend to focus narrowly on coping with daily stress, while ignoring the deeper insights in Buddhist meditation practices that work toward self-transcendence, greater awareness, and enlightenment.

Innovative technologies and gadgets are reshaping how consumers experience, understand, and track the effects of meditation.

- New gadgets and devices that use the latest sensing, monitoring, and haptic technologies are bringing a science-based edge to meditation – both to give customers a more engaging and personalized experience, as well as to help them track and understand what happens when they meditate. Products like Breathe for Apple watch, Core Meditation Trainer, and Aduri Cushion use haptic technology (touch-based sensations and vibrations) to help users relax, maintain focus, and control their breathing. Headbands like Muse and Emotiv Insight use sensors and biofeedback to track brain activity during meditation, while trackers like Spire Stone and Inner Balance monitor breathing and heartrate.
- Other devices incorporate sound, light, and virtual reality (VR) technologies to provide an immersive, multi-sensory experience and promote deeper relaxation during meditation (for example, Mindlightz glasses, Brain Tap headset, and Breathe 2 lamp). VR technologies limit distractions and create a deeper sense of calm, and they are often combined with biofeedback and neurofeedback – for example, the TRIPP VR, Healium VR/AR, and Flow VR systems (which are streamed through Oculus or Pico headsets, Apple watches, and other connected devices). In the wellness travel space, spas and hotels are incorporating VR-based meditations into spa treatments and even hotel rooms (e.g., StayWell wellness rooms with VR meditation apps). Other innovators merge VR, meditation, and gaming to provide a fun new immersive experience (e.g., Mind Labyrinth VR Dreams, Microdose VR, SoundSelf, and Marvellous Machine).

Businesses and business models are evolving rapidly to integrate meditation and mindfulness into the live, work, and travel spheres.

- The range of places and spaces where we can learn and practice meditation is exploding. Secular centers for meditation are not new; places such as the Esalen Institute, Omega Institute, Kripalu Center, Middle Way Meditation Institute, Chopra Center, and Institute for Mindfulness-Based Approaches host in-person and online sessions, sometimes with well-known teachers such as Jon Kabat-Zinn. Meditation is an increasingly popular wellness tourism offering, with thousands of retreats and classes offered around the world, sometimes in exotic locations and luxury wellness resorts (from Jamaica's seaside cliffs to the Moroccan desert), and even as a combination of meditation and safari packages in Africa. In some major cities, dedicated meditation studios like Inscape and MNDFL (New York), Unplug Meditation and The DEN (Los Angeles), Inhere (London), and Muon (Tokyo) have emerged in recent years to cater to urbanites who are looking for a reprieve from their stressful daily lives. As interest grows among mainstream consumers, meditation classes are increasingly offered in yoga studios, at comprehensive gyms and fitness centers, and even at YMCAs and community centers. Other innovative services bringing meditation and mindfulness to consumers include mobile meditation studios (e.g., MeditationWorks in Canada, BETime in New York City, PauseNow in California, Yogi Truck in UAE) and community/mass meditation events (e.g., The Big Quiet).
- Meditation and mindfulness companies are increasingly partnering with businesses in other sectors such as travel, especially as marquee brands respond to consumer interest and pivot to incorporate wellness offerings – for example, Headspace with Virgin Atlantic, Nike, and Hyatt; Calm with American Airlines and Uber; and Inscape with JetBlue.[30] Industry leaders such as Calm and Headspace are expanding into adjacent spaces as they break out of the confines of being a "meditation app business." For example, Calm is now branding itself as a "mental fitness" company, serving customers at XpressSpa locations and Marks & Spencer's Sleep Shop, and is considering hospitality offerings such as a Calm hotel or an island resort.[31]

- Meditation and mindfulness offerings are growing rapidly in workplaces, as employers begin to understand the business case for supporting their employees' mental wellness. Apart from meeting mental health needs (via counseling or medical referrals), many employers are offering mental wellness support via apps, free/subsidized classes, and dedicated meditation rooms/pods in the office. Market leaders like eMindful are rushing to develop specialized products and services for corporate clients. With the future of workplaces in flux and working from home on the rise due to COVID-19, virtual delivery of meditation and mindfulness assistance/services will become an increasingly prominent feature of employee wellness programming.
- The market for accessories to support meditation is diverse and fragmented, including cushions, blankets, mats, benches, and chairs; beads, statues, prayer wheels, alters, and crystals; sound and aroma products (e.g., incense and burners, candles, singing bowls, bells, chimes); and clothing. Mindfulness has become a selling point for almost any type of consumer product imaginable – including mindfulness calendars and cards, mindfulness jewelry, and even art supplies and office supplies. Adult coloring books were a major mindfulness fad in the United States between 2015-2017; while sales have tapered off substantially, the trend has continued.[32] And as the general demand for physical books declines, digital coloring books for mindfulness practice remain popular. Mindful coloring has been followed by a mindful journaling fad – and both fads have had a significant impact on overall sales of art and writing supplies.[33]

As different needs are being noticed and addressed, the market is diversifying away from the Anglo and cisgender narrative.

- Recognizing that gender identification, culture, and ethnicity shape a person's mental wellness needs, entrepreneurs are developing culturally relevant offerings to target more diverse customers. For example, the Sanity & Self app promotes mindfulness practices for women and boasts users in over 100 countries. Apps such as Shine and Liberate are developed to help BIPOC (Black, Indigenous, and People of Color) users combat stress and anxiety. The Ayana app targets marginalized consumers including members of the LGBTQ+ community and BIPOC. While app choices for Spanish speakers are still limited, they are growing – for example, Escala Meditando, Aire Fresco, and Intimind. The introduction of Tawazon has given the MENA region its first Arabic language mediation and mindfulness app for both adults and children.[34]

Public organizations and nonprofits are entering the meditation and mindfulness space as a matter of public health strategy.

- Recognizing the value of mediation and mindfulness for improving mental health and well-being, public organizations and non-profits are helping to bring these modalities and practices to more people, including vulnerable populations. For example, the U.S. Department of Veterans Affairs has designed its own app – Mindfulness Coach – to train current service members and veterans in mindfulness techniques. UK-based nonprofit Breathworks has partnered with governments to bring mindfulness training to organizations and people in over 35 nations.

Brain-Boosting Nutraceuticals & Botanicals

$34.8b
market size

Businesses in this subsector

Foods & Beverages

- Functional/fortified foods & beverages for brain health, memory, energy
- CBD/hemp/cannabis-infused foods & beverages

Supplements & Herbals

- Vitamins & supplements for brain health, memory, energy
- Natural & traditional sleep remedies (e.g., melatonin)
- CBD/hemp/cannabis-infused supplements
- Functional mushroom extracts & supplements for brain health, memory, focus*

Services

- Cannabis & psychedelic retreats*
- Psychedelic-assisted therapies*

** Not included in the market size number for this subsector. See Chapter IV for more details.*

Sample companies & market innovators

Functional Foods & Beverages for Brain Health

- Recess waters
- Phocus
- Koios
- BrainJuice
- IQ Bars
- NeuroGum
- Trubrain
- Brainiac Kids

Natural Sleep Remedies

- OLLY
- Nature Made
- NOW Foods
- Luna Kids
- Sugarbear

Supplements for Brain Health

- Moon Juice
- Gaia Herbs
- Nordic Naturals
- Natrol
- Qualia
- Braineffect
- Apothekary
- KAMU Labs

Cannabis & Psychedelics – Clinics, Therapies, & Retreats

- Field Trip Health
- SoundMind
- Synthesis
- MycoMeditations
- Atman

Cannabis & Psychedelics – Drugs & Products

- MindMed
- Compass Pathways
- Champignon Brands
- CiiTECH
- Tilray
- Canopy Growth
- Trulieve
- Green Gorilla
- KIVA Confections
- CV Sciences
- Charlotte's Web
- Rainbo

Background & Evolution

Humans have used mind-altering drugs since prehistoric times, for religious, healing, and recreational purposes.

- Archaeological evidence indicates that plant-based, mind-altering drugs have been used by humans for as long as 10,000 years. Cannabis was cultivated and used in Central Asia and China more than 5,000 years ago. Opium ("Hul Gil" or the "joy plant") was cultivated by the ancient Sumerians from around 3400 BC. Indigenous cultures around the world have long utilized endemic plants for their psychoactive and stimulant properties, such as coca leaf in South America, peyote among Native Americans, nutmeg and betel nut in South and Southeast Asia, blue lotus in ancient Egypt, mushrooms in Mesoamerica and North Africa, and khat in Africa and the Arabian peninsula.
- For most of history, these drugs were seen as natural, not something to be feared or controlled. Cannabis, opium, and cocaine were widely used in Western medicine starting in the 19th century – to treat pain, melancholia, nervous disorders, insomnia, and many other physical ailments. During the 1950s and 1960s, LSD, psilocybin, and mescaline were used in psychotherapy to treat thousands of patients. Psychedelics were actively studied by scientists in the United States, Canada, and Europe, with promising results for treating depression, anxiety, trauma, addiction, and other disorders. However, medical use and research on psychedelics halted abruptly at end of the 1960s, when possession and use of LSD and mushrooms were banned by the U.S. government (and then became listed as Schedule I drugs by the United Nations in 1971), in response to the widespread recreational use of drugs among the counterculture movement, and rising concern about drug abuse and its negative impacts.
- The last 20 years have brought a renewed interest and a resurgence of scientific and clinical research on the potential for cannabis and psychedelic drugs (especially psilocybin, ketamine, and MDMA), although legal restrictions and socio-cultural sensitivities about drugs continue to put a damper on widespread research and therapeutic uses. Decriminalization and liberalization of drug laws across many countries (e.g., legalization of medical marijuana in more than 30 U.S. states) have also created a rapidly-growing private and grassroots market for recreational and wellness-driven drug use – for example, an ever-growing array of over-the-counter cannabidiol (CBD) products; microdosing of psychedelics for boosting energy, creativity, and brain performance; and even a burgeoning niche market for psychedelic retreats and tourism.

Brain-boosting and sleep-enhancing supplements, foods, and beverages are a modern industry that emerged to meet modern consumer demand.

- Although the connection between nutrition and our brain health and functioning has been known for a while, in recent years there is rapidly rising interest among consumers in foods, beverages, and supplements that support brain health, mood, memory, energy, and sleep. This demand is supported by the growth of the wellness movement and the consumer quest for more natural alternatives to popping pills. A growing body of research evidence demonstrates the importance of a healthy diet for mental health, and is also identifying key nutrients and ingredients (e.g., pre- and probiotics, polyphenols, Omega-3 fatty acids, choline, flavonoids) and superfoods (e.g., oily fish, berries, dark chocolate, turmeric, green tea, fermented foods) that improve the microbiome and support gut-brain health.
- Food companies are capitalizing on this trend by developing vitamins, supplements, and fortified/functional foods and beverages enhanced with various nutrients that purport to support brain health and improve sleep. The range of products in the market is broad: naturally-derived and

herbal sleep remedies (e.g., melatonin, valerian root, passionflower); natural supplements for mood, energy, alertness, and brain health (e.g., St. John's Wort, ginseng, Ginkgo biloba, Coenzyme Q10, Omega-3 fatty acids, fish oils); as well as functional foods and beverages enhanced with brain, memory, and energy-boosting ingredients such as DHA, choline, L-theanine, taurine, guarana, ginseng, and caffeine (e.g., Koios or Brain Juice beverages, Phocus waters, TruBrain bars and drinks, Brainiac Kids yogurts, Neuro gum and mints).[35]

- Rising longevity, along with the risk of cognitive decline and diseases such dementia and Alzheimer's, have increased the demand for brain supplements among older populations. In the United States, more than one-third of the population over age 75 takes brain health related supplements to maintain/improve mental sharpness or to reverse/delay dementia (including fish oil, Omega-3, turmeric, Coenzyme Q10, green tea, and Ginkgo biloba).[36] Among younger populations, there is growing interest in functional foods and beverages that may enhance cognitive ability (focus, attention, stamina), including from executives and professionals who want to improve performance at work, as well as students for exams and school work. Global surveys conducted by Euromonitor found that 15-20% of people are highly concerned with their memory, and 35-40% are moderately concerned, and this is true across age groups.[37]
- While the market for vitamins and supplements, sleep aids, and caffeinated and energy drinks, has existed for decades, new products that are marketed from the brain health and brain boosting angle are proliferating, even when many of these claims have not been validated by rigorous clinical research. Botanicals, supplements, and functional foods/beverages that are believed to improve cognitive function in healthy individuals are generally known as *nootropics*. There are many types of nootropics, including not only botanical extracts and supplements, but also addictive substances and stimulants (nicotine, caffeine), synthetic compounds (piracetam, noopept), and prescription drugs (Ritalin, Adderall). The use of nootropics is controversial, especially the off-label and illegal use of prescription drugs as a cognitive enhancer in healthy people, and these kinds of supplements are not regulated in the way that pharmaceuticals are.[38]
- The Global Council on Brain Health found that very few supplements have been carefully studied for their effects on brain health; several well-designed studies on the connection between supplements and brain health found no benefit in people with normal nutrient levels. It is unclear whether people with nutritional deficiencies can benefit their brains by taking a supplement, because the research is inconclusive.[39] Most experts recommend whole foods and a generally healthy diet over supplements and functional foods for supporting brain health and mental well-being.[40] Regardless, products with brain-enhancing promises have been one of the fastest growing niches within the supplements category, while functional foods and beverages with similar promises are also growing rapidly.

Developments to Watch

Rising consumer interest will drive the continued growth of cannabis-based products and services for mental wellness.

- The movement away from prescription drugs and the continuing relaxation of legal restrictions have led to rising demand for products that include cannabis, hemp, CBD, THC, and other botanicals (e.g., reishi mushrooms, ashwagandha) for various mental health and mental wellness usages. Of these, CBD products have most rapidly increased in popularity. A 2019 survey by U.S *Consumer Reports* found that more than 25% of Americans have tried CBD, including 40% of people in their 20s and 15% of people 60 and over.[41] In the UK, the number of regular CBD users is estimated at 1.3 million (or about 2.5% of the adult population).[42] Elsewhere, various studies have estimated usage of cannabis products to be roughly one in five adults in Israel, 6% in Germany, 15% in Chile, and 10% in Australia.[43] A study in Canada, conducted after cannabis was legalized for recreational use, found that 59% of Canadians are currently using and/or are interested in using cannabis.[44]

- Just a few years ago, pain management was the primary medical use for cannabis, often as a replacement for over-the-counter and prescription drugs. Increasingly, consumers have been turning to cannabis for mental wellness purposes. A 2019 Canadian study found that 46% of cannabis users do it for fun, while a greater percentage use it for wellness purposes, such as to relax (62%), relieve stress/anxiety (54%), improve sleep (42%), and improve mood (39%).[45] Similarly, a 2019 U.S. *Consumer Reports* study found that many Americans use CBD mainly to relax and to reduce stress and anxiety, and most of them find it to be either extremely or very effective for this purpose.[46] CBD can now be found in hundreds of products, including pills, oils, tinctures, and gummies; personal care and beauty products such as creams, masks, and cosmetics; and a variety of food and beverages. Even Martha Stewart has become a CBD enthusiast, launching new lines of CBD products for humans and pets.[47] CBD is also quickly expanding into new categories such as sleep (e.g., CBD-infused pillows, mattresses, and sheets) and sexual wellness products (e.g., HerTime and HisTime CBD oils, CBD-infused lubricants).

The regulation of brain-enhancing foods and supplements is loose, and the legality of plant-based drugs is evolving and unclear, creating both opportunities and risks in the market.

- This industry segment sits in an extremely fragmented regulatory landscape. Across countries, foods, beverages, supplements, and herbal remedies marketed for brain health and sleep are regulated as a special category of food, and not as drugs. In the United States, for example, dietary supplements are not required to demonstrate safety and effectiveness before they are sold, contrary to what many consumers believe. A 2019 AARP survey found that the majority of U.S. adults are concerned with the effectiveness, safety, purity, and thoroughness of government review of vitamins and supplements, including those sold for brain health.[48]

- Plant-based drugs like cannabis and psilocybin also have a complicated regulatory landscape, as the legality of these substances evolves rapidly around the world. Canada and Uruguay have legalized recreational cannabis use, while Israel has decriminalized it. Other nations, such as Mexico, the Netherlands, Australia, and Chile, are moving in the same direction.[49] In the UK, cannabis is illegal, while hemp-based CBD is legal as a food supplement.[50] The United States has an extremely confusing array of drug laws. While the U.S. Food and Drug Administration (FDA) has legalized hemp-derived CBD (as long as it contains less than 0.3% THC), marijuana-derived CBD remains a controlled substance, and each state has its own laws that govern the sale and recreational use of cannabis.[51] The FDA has recently sent warning letters to companies that market CBD as an alternative to opioids or as a treatment for opioid addiction and other serious diseases.[52] And, while the FDA has not approved CBD-infused food and beverages or the sale of CBD products as dietary supplements, these products continue to proliferate in the consumer market, and the businesses that produce and sell them have been operating in a legal gray zone. Psilocybin is another plant-based substance that is quickly gaining consumer interest for mental health and mental wellness purposes, and it is already legalized in a few countries including the Netherlands, Brazil, Jamaica, and Canada. Access to psilocybin is more limited in the United States; it has been decriminalized in a handful of cities (e.g., Denver, Colorado and Oakland, California). Oregon is taking steps toward allowing psilocybin mushrooms for medical purposes, while Washington, DC, is working toward decriminalization of several psychedelic plants and fungi.[53]

- Legality issues aside, this fragmented landscape means that there is little regulation on quality, manufacturing, labeling, safety, and product claims when it comes to products containing CBD, psilocybin, and other plant-based drugs and supplements.[54] Further complicating the picture, while recreational use of cannabis is being relaxed in some countries, in other countries its possession and sale can be a serious offense and in some cases is punishable by death (especially in certain Asian and Middle East countries). For now, consumer demand for these products and experiences will depend on the location and legality. For example, adventurous consumers may seek psychedelic treatments in countries with more relaxed regulations, and some tourism destinations are marketing themselves as such. Psilocybin treatment centers such as the Synthesis (The Netherlands) and MycoMeditations and Atman (Jamaica) have already attracted many wellness travelers with this special interest. Magic mushroom wellness retreats are being marketed in destinations such as the Netherlands, Mexico, and Peru, while Europeans and Americans interested in ayahuasca have been flocking to Latin American countries such as Costa Rica, Peru, Ecuador, Colombia, and Brazil for special retreats or treatments.[55] Cannabis vacations and retreats are offered in a variety of destinations, from Uruguay to Canada to Alaska. Thailand is the first southeast Asian country to legalize medical cannabis, creating a boom for medical cannabis tourism, while liberalization of hemp and CBD is expected to fuel new wellness tourism offerings.[56]

Promising research on the medical use of plant-based drugs, along with a gradual relaxation of regulations, will also increase their use for mental wellness.

- Many countries make a distinction between the use of various plant-based and psychoactive drugs for medical versus non-medical purposes, often allowing for specific medical uses but criminalizing other uses. Currently, several Schedule I drugs – including psilocybin, MDMA, ketamine, ibogaine, ayahuasca, peyote, and even LSD – have shown promise for treating a variety of medical conditions, such as PTSD, addiction, depression, seizures, concussions, chronic pain, and inflammation. The U.S. FDA has authorized CBD to treat epilepsy and has fast-tracked psilocybin as a treatment for depression. Compass Pathways, a UK company, has already obtained a U.S. patent for producing psilocybin to treat depression.[57] MDMA and other psychedelics, as well as cannabis, have shown promise for mental health treatments in Israeli government-funded research, and several companies are exploring their use.[58] Some of the leading and most innovative cannabis and CBD companies operate in Canada, which has developed a clear legal system that permits their medical and recreational use. In 2019, the Johns Hopkins Center for Psychedelic and Consciousness Research was established to study medical applications for psychedelics – the first such research center in the United States and the largest center of its kind in the world.[59] Psychedelic-enhanced psychotherapy clinics for treating PTSD and other conditions have opened in Israel, Canada, and the United States (e.g., Field Trip Health, SoundMind), while a number of startups are conducting clinical trials on medicines made from a variety of psychoactive drugs (e.g., MindMed, Champignon Brands, Compass Pathways)[60] – although for now these companies are focused exclusively on medical treatments and not recreational use. The findings from these ongoing studies and research will influence the process and pace of medical treatment applications; legalization; private and government investments; potential mental wellness products and services; as well as consumer acceptance, demand, and future market growth.

Senses, Spaces, & Sleep

$49.5b
market size

Businesses in this subsector

Services

- Sound therapy (sound baths, gong baths)
- Light therapy for mental wellness
- Aromatherapy
- Sleep therapy, counseling, & retreats
- Nap bars & cafés
- Sensory retreats & experiences (forest bathing, hugging therapy)*
- Sensory-based wellness design & architecture (biophilic design, multi-sensory design, human-centric lighting)*

Products & Accessories

- Sound therapy instruments (chimes, gongs, etc.)
- Light therapy consumer devices (lamps, visors, light boxes)
- Aroma & scent products (essential oils, home fragrances, mists, diffusers)
- Anti-stress & tactile gadgets (stress balls, fidget spinners, worry stones, desk toys)
- Sleep ambience & relaxation products (nap pods, weighted blankets, specialized pillows, eye masks, etc.)

Tech

- Noise cancellation & white noise devices
- Sound therapy gadgets & apps
- Circadian lighting & apps
- Sleep trackers & monitors (wearable & non-wearable)
- Sleep sensory & ambience gadgets
- Smart beds, mattresses, & pillows
- Sleep & jet lag apps
- Stress-reducing sensory wearables

* *Not included in the market size number for this subsector. See Chapter IV for more details.*

Sample companies & market innovators

Sleep Services & Napping

- SleepScore Labs
- Shleep
- Casper's The Dreamery
- Mr. Healing (Korea)
- MetroNaps
- GoSleep

Sensory Products & Services

- Phillips
- Brilli
- Aromatherapy Associates
- doTERRA
- Young Living
- Revive
- Bearaby
- Gravity Blanket

Sleep Monitors & Trackers

- Beddr
- Dreem
- Oura
- Beddit

Sleep & Sensory Apps

- Sleepio
- Sleep Cycle
- Pillow
- Slumber
- Pzizz
- Timeshifter
- Uplift
- Somryst
- Endel
- Portal

Sensory Tech & Wearables

- Kokoon
- Lumos
- Somnox
- Hatch
- ZeeQ
- Eight Sleep
- Apollo
- Embr
- Xen
- N.O.W. tone therapy
- NeoRhythm
- NuCalm

Sensory Spaces

- Terrapin Bright Green
- Intl. Living Future Institute

Background & Evolution

Senses and spaces have long been believed to improve mental and physical well-being and to awaken spiritual consciousness.

- Indigenous cultures and spiritual traditions around the world have long used **sound** in healing ceremonies: drumming, handclapping, singing, chanting, Tibetan singing bowls, Australian didgeridoo, Peruvian whistling vessels, West African djembe, gongs, rainsticks, bells, and so on. Ancient Egypt is considered the birthplace of **aromatherapy** and essential oils; they used fragrances and perfumes in festivals and religious ceremonies, and used aromatic herbs for embalming. Since ancient times, the Indian Ayurvedic system has incorporated herbs and aromatic plants as an essential component. **Light, color, and gemstones** have been used in healing for thousands of years, and light therapy was practiced in ancient Egyptian and Greek temples. The word "crystal" is derived from the Greek word "krustallos," because ancient Greeks believed that clear crystals were eternal ice sent from the heavens. The Chinese used **stress objects** as early as the Han Dynasty (202 BC-220 AD), when warriors would squeeze walnuts and balls carved from stone and metal to stay focused during battle. **Worry stones and beads** have long been used in cultures around the world, from Native American tribes, to Ireland, to Greece, to Tibet.
- Sensory-based healing was first explored by science in the 1600s-1800s, when European scientists made a variety of new discoveries about the nature of light and color (e.g., refraction, polarization of light, and infrared and ultraviolet radiation) – helping to bring light therapy into the modern age. European and American sanatoria treated patients with sun baths (heliotherapy) in the late-19th and early-20th centuries. Aromatherapy and essential oils were studied by European scientists at the beginning of the 20th century and were used to treat soldiers during WWI and WWII. Music therapy began in the United States in the 1940s, when it was used as a recovery treatment for soldiers after WWII. But with the development of modern medicine in the 19th century, most sensory-based healing modalities – especially for mental health and wellness purposes – largely fell out of favor for many decades.

The modern wellness industry has played a leading role in reintroducing many sensory healing modalities to consumers.

- Sensory healing had its resurgence in the 1970s, when the hippies and the New Age movement brought a new wave of interest in alternative therapies, natural medicine, and ancient traditions such as sound healing, energy healing, crystals, worry stones, essential oils, and aromatherapy. However, even as the ability of scientists to study these practices has improved, most of them (with the exception of light therapy) have remained on the fringes of the medical establishment. In recent years, the modern wellness industry has played a key role in bringing sensory healing to a wider, mainstream audience, mostly in the spa and hospitality setting, by offering experiences such as sound baths, LED light treatments, aromatherapy and crystals in massage and spa treatments, and reiki and energy healing treatments. Consumer interest in these therapies has risen dramatically, coinciding with a growing body of research evidence on the mental and physical health benefits of sound, light, aroma, energy, and touch.

Developments to Watch

Sleep looms large in senses and spaces.

- People all around the world are plagued by inadequate and poor sleep, and the search for better sleep is driving a rapidly expanding market for sleep services and solutions. In the United States alone, 50-70 million people complain of sleep deprivation or suffer from a sleep disorder[61]; in the UK, it is estimated that one in three people suffer from insomnia.[62] Stress and sleep are closely related. In a 2019 study of more than 11,000 adults worldwide, 54% said that worry and stress affect their sleep.[63] In North America, consumers have been shifting away from relying on prescription and over-the-counter medications toward softer, alternative, and more natural solutions like apps, wearables, monitors, specialized bedding, and mattresses. The sleep market is also seeing strong growth and a lot of innovations in the Asia Pacific region.[64] Non drug-based sleep services and solutions are growing in both the medical and wellness arenas. Medical sleep centers have gained in popularity as consumers begin to regard poor sleep as a condition that needs to be addressed, and as more people understand the connections between sleep and physical/mental health. In the wellness arena, offerings include pay-to-nap services, sleep ambience and bedding products, sleep apps, and tech-based gadgets; many of these offerings rely on external sensory stimuli to promote relaxation and better sleep environments. There are even "sleep influencers" and Instagram accounts that focus solely on sleep.[65]
- Pay-to-nap spaces are gaining interest in hectic urban centers around the world (e.g., London's Pop & Rest, Madrid's Siesta & Go, Tokyo's Nescafe Sleep Café, New York's The Dreamery and ReCOVER). South Korea is home to dozens of themed nap cafés that cater to stressed-out, sleep deprived workers on their lunch breaks; some of the largest brands have 50+ outlets across the country (e.g., Best Sleep Healing Café, Mr. Healing), while even movie theaters offer daytime napping services.[66] In 2017, a UK gym chain introduced a "napercize" group class that involves a 45 minute nap.[67] Nap pods are being installed in workplaces, airports, and spas worldwide. In a recent U.S. survey conducted by Mindbody, more than half of respondents said they are interested in trying a nap facility.[68]
- Tech-based sleep solutions will continue to drive market growth. These include a wide array of sleep tracking devices that use the latest sensing and monitoring technologies to assess and improve the quality of sleep and track progress. The most popular wearable activity trackers (e.g., Apple watch, Fitbit, Garmin) have expanded from fitness tracking to sleep tracking, while many dedicated sleep trackers have also entered the market, including headbands (Dreem 2, Philips SmartSleep, Sleep Shepherd), rings (Oura, THIM), forehead sensors (Beddr SleepTuner), and nonwearable mats, pillows, and monitors (Withings Sleep, Beddit, Beautyrest Sleeptracker, Circa clock, iSense Sleep Smart Pillow). Many of these solutions combine hardware with sleep coaching apps/programs that are sold as a subscription. Some tracking devices also incorporate sensory stimuli like music and noise cancellation (Kokoon headphones) and light and circadian science (Lumos and Neuroon eye masks) to promote relaxation and improve sleep quality. For consumers who do not like wearables, new sleep coaching apps use a cell phone's listening function and accelerometer to track nightly breathing and movement and to create a detailed record and a customized, routine adjustment plan for better sleep (Sleep Cycle, SleepScore, Pillow). Other sleep coaching apps and online programs connect with users' general activity trackers and wristbands (Sleepio), or draw upon cognitive behavioral therapy techniques for insomnia (Somryst, CBT-i Coach).

- Some tech-based sleep gadgets use multi-sensory stimuli – drawing on the latest technology in neuroscience, haptics, sound, aroma, and light therapy – to create better sleep environments. For example, Sleepace offers an aromatherapy light that emits red light, herbal scents, and soothing sounds to raise melatonin levels and induce sleep, and the Somnox Sleep Robot tracks breathing and uses sounds and vibrations to promote relaxation. Sensory stimuli are also being incorporated into high-tech mattresses and pillows, often combined with sleep tracking. The Eight Sleep Pod mattress uses cooling technology and sensors to regulate temperature and track sleep, while smart pillows and pillow pads (ZeeQ, Moona, DreamPad) incorporate temperature control, sound, and vibration technologies. A variety of sleep apps use psychoacoustic principles, white noise, soundscapes, and even soothing bedtime stories to induce relaxation and create better sleep routines (Pzizz, Noisli, Slumber, Sleepiest). Many in-person sleep and nap studios have incorporated these sensory components (scents, sounds, special lighting) into environments that induce rest and a calm awakening (e.g., MetroNaps pods, Casper's The Dreamery nap bar).
- The reach of the sleep market extends far beyond high-tech sensors, trackers, and gadgets. Every product that appears in a bedroom is now being redesigned and marketed around better relaxation and sleep, including aromatherapy diffusers; sleep lights; white noise and sound machines; weighted blankets; temperature regulating mattresses, pillows, and mattress pads; anti-snoring pillows; cooling and weighted masks; light-blocking shades and curtains; and much more.

The science of light and circadian rhythms is driving a new market for healthier and human-centric lighting solutions.

- Among the sensory healing modalities, light therapy has seen the most integration into modern psychiatry and medicine, especially for treatment of depressive disorders, seasonal affective disorder (SAD), sleep disorders, and various skin conditions. In recent years, there has been a surge of interest in circadian science and how light exposure can affect our mood, our sleep, and even how we metabolize food. Human-centric lighting is an emerging and fast-growing sector focused on improving people's well-being, mood, comfort, productivity, and health by adjusting directions, color temperatures, and illuminance levels of light – it includes circadian lighting products and systems like Philips Hue, Ketra, Brilli, and Lighting Science.[69] The wellness real estate and architecture field is also bringing greater attention on the importance of natural daylight inside our homes, workplaces, and other indoor spaces.[70] While the light therapy market overlaps with medical and clinical applications, demand for portable and consumer-oriented light products is on the rise, especially for boosting energy and addressing symptoms of SAD (e.g., light boxes, floor and desk lamps, light visors, dawn simulators).

Stressed out consumers are looking for multi-sensory solutions to bring calm and comfort.

- As noted above, sensory healing using sound, scent, light, color, and touch has been around since ancient times, and these practices have been reintroduced to modern consumers by the spa and wellness sector. The type of sensory healing that is most sought after by today's consumers reduces daily stress, worry, and anxiety, and their deep desperation has spurred a growing market for calming and destressing products. Many of these solutions are simple and low-tech, including scented candles, essential oil diffusers and mists, healing crystals, fidget spinners, stress balls, putty and slime toys, mood music, etc. Lifestyle fads such as the Danish concept of *hygge*, or KonMari decluttering principles, have heightened awareness of the mental wellness impact of our daily living environments. Many consumers are now willing to spend hundreds of dollars on products like weighted blankets and vagus nerve oils, which are marketed for their potential to induce relaxation and regulate stress.

- Outside of our homes, there is growing interest in multi-sensory experiences and treatments such as sound/gong baths, floatation tanks, salt caves, forest bathing, hugging therapy, scream therapy, laughter yoga, and cuddle parties – these offerings are increasingly found in spas, resorts, retreats, yoga and meditation studios, and other venues all around the world. And, technology companies are incorporating these kinds of sensory stimuli into all types of meditation and sleep gadgets and apps (as described elsewhere in this chapter), other consumer wearables aimed at stress relief (e.g., TouchPoints, Doppel, and Apollo vibrating wristbands; Embr Wave temperature control wristband), sound therapy tech gadgets (e.g., N.O.W. tone therapy system, Xen earbuds, Plantwave), and even wellness music channels and generative music apps (e.g., Endel).[71]

Senses, spaces, and sleep offerings are increasingly integrated with wellness travel and workplaces.

- Hospitality businesses, especially spas and wellness resorts, were early adopters in recognizing the importance of senses, spaces, and sleep to our mental wellness. In particular, the hospitality sector has embraced mental wellness and sleep in the design of spaces and physical environments. For example, many hotel brands tout their calming and sleep-friendly rooms and amenities, including sound-proofed windows, light-blocking curtains, special pillows and beds, circadian lighting systems, meditation programming on demand, and biophilic design. With so many sleep-deprived people, sleep vacations are on the rise worldwide. Some hotels and resorts offer sleep programs and retreats that include sleep tracking, sleep consultations, and various sleep-focused sensory modalities (e.g., Six Senses, Hyatt, Canyon Ranch, Enchantment Resort, Swiss Hotels, Kamalaya). Between jet lag, stress, and changes in routines and time zones, sleep has always been in peril during travel. Sleep-enabling travel products and services have expanded from specialized travel pillows, eye shades, and noise cancelling headphones, to airport sleeping pods, to apps that address jet lag (such as Timeshifter, Entrain, and Uplift).
- Workplaces and co-working facilities have also been evolving toward multi-sensory and spatial features that enhance mental wellness: natural light, biophilic design, fresh air, pro-social design, meditation rooms, sleeping pods, etc. Many of these investments are made with the aim of financial returns in the form of higher employee productivity. Some employers are turning to sleep products and services as part of their employee wellness offerings. In fact, many sleep companies (e.g., SleepScore Labs, Shleep, Beddr, Dreem, GoSleep) are working with corporate clients to help employees get better sleep through apps, assessments, and customized sleep programs.[72] In Japan, many companies are starting to encourage workers to take nap breaks at work, supported by health ministry recommendations emphasizing the importance of sleep and taking a 30-minute nap every afternoon, as well as the cultural concept of *inemuri* ("sleeping while present").[73]

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Appendix A: Understanding Key Terminologies – Mental Illness, Mental Health, Mental Well-being, and Happiness

One reason it is challenging to understand the concept of *mental wellness* is because the terminologies used to talk about it are poorly defined and used inconsistently. Most people know what *mental illness* is. But there is little to no understanding or agreement on the differences between *mental wellness*, *mental health*, *mental well-being*, and *happiness*.

Mental Illness: According to the American Psychiatric Association (APA), mental illnesses are diagnosable mental disorders or health conditions that involve "significant changes in thinking, emotion, and/or behavior," and that are "associated with distress and/or problems functioning in social, work, or family activities."[1] The APA's *Diagnostic and Statistical Manual of Mental Disorders, 5th Edition (DSM-5)* contains the diagnostic criteria and symptom checklists used to define, classify, and identify mental illnesses (e.g., depression, anxiety, personality disorders). Note that cognitive decline and dementia are considered to be neurological or neurocognitive disorders, but not mental illnesses or psychiatric disorders (although this distinction has become controversial in recent years).[2] Mental illness is associated with a *pathogenic* approach to health: understanding, diagnosing, and treating disease, and focusing on acute and chronic conditions and their risk factors.[3]

Mental Health: "Mental health" has become an extremely problematic term.

- Traditionally, psychologists, psychiatrists, and academics/researchers in these fields have used the term *mental health* to mean a holistic and positive approach to mental well-being (completely separate from mental illness). This usage is associated with the *salutogenic* approach of preventing illness, maintaining good mental health, and pursuing optimal mental well-being. Three important definitions of *mental health* are listed below; these definitions talk about *mental health* as a positive state that is separate from mental illness. **This usage of *mental health* is the same as what we call *mental wellness* in this report.**
    - ***World Health Organization:*** "Mental health is a state of well-being in which an individual realizes his or her own abilities, can cope with the normal stresses of life, can work productively and is able to make a contribution to his or her community. Mental health is fundamental to our collective and individual ability as humans to think, emote, interact with each other, earn a living and enjoy life. On this basis, the promotion, protection and restoration of mental health can be regarded as a vital concern of individuals, communities and societies throughout the world."[4]
    - ***U.S. Surgeon General:*** "Mental health" is "the successful performance of mental function, resulting in productive activities, fulfilling relationships with other people, and the ability to adapt to change and to cope with adversity; from early childhood until late life, mental health is the springboard of thinking and communication skills, learning, emotional growth, resilience, and self-esteem."[5]
    - ***Corey Keyes:*** Keyes says that "mental health can be operationalized and measured in terms of the presence and absence of positive feelings towards one's life and the presence and absence of positive functioning in various facets of functioning in life."[6] Keyes says that mental health and mental illness are two entirely separate (but correlated) dimensions, and he presents them on his dual-continuum model (as discussed in *Chapter II*).

- However, people in the United States and English-speaking world (i.e., consumers, media, businesses, and others outside of academia) now use the term *mental health* as a euphemism for *mental illness* (e.g., "mental health issues," "mental health disorders," "poor mental health") – mainly in an attempt to avoid stigmatizing mental illness by using terms that feel negative, like "illness" or "disorder." Similarly, the term "mental health professionals" refers to psychotherapists, psychologists, clinicians, and counseling professionals; one would never call a meditation teacher or life coach a "mental health professional."

Given the contradictory usages of the term *mental health*, we advocate for use of the term *mental wellness* to refer to the positive, *salutogenic* approach to mental well-being that is separate from mental illness (as elaborated in *Chapter II* of this report). In adapting Corey Keyes' dual-continuum model, we have renamed the vertical "*mental health* axis" as the "*mental wellness* axis" in order to clarify the terminology and reinforce this distinction.

Mental Well-being: There is no universally understood definition for the term *well-being*, but it is generally used in a positive and holistic sense to encompass both good physical health and good mental health. When people use the term *mental well-being* they are generally referring to the *salutogenic* concept described above in the WHO, U.S. Surgeon General, and Corey Keyes definitions.[7] According to Keyes, mental well-being or positive mental health is measured by looking at a combination of several types of well-being: emotional/subjective well-being, psychological well-being, and social well-being (see *Appendix B* for a more detailed explanation). **In our interpretation, *mental well-being* is generally synonymous with *mental wellness*.**

Happiness: There are many definitions of happiness; most refer to having positive emotions and a sense of satisfaction with one's life.[8] In psychology, happiness is associated with the concept of "subjective well-being," which involves three components according to Ed Diener's well-known model: frequent positive affect/emotions, infrequent negative affect/emotions, and life satisfaction.[9] Corey Keyes elaborates 13 factors that can be used to measure mental wellness; among those, only two factors are related to happiness or subjective/emotional well-being (see *Appendix B* for a more detailed explanation). Therefore, **happiness is a component of mental wellness, but mental wellness is broader than happiness**.

Endnotes

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Appendix B: Measuring Individuals' Mental Wellness

Mental health professionals diagnose mental illness by looking for clusters of symptoms, behaviors, and feelings that correspond with mental disorders catalogued in the *Diagnostic and Statistical Manual of Mental Disorders, 5th edition (DSM-5)*. According to Corey Keyes, our mental wellness can be evaluated similarly, by looking for clusters of symptoms that correspond with positive feelings (subjective well-being), positive functioning (psychological well-being), and positive relationships (social well-being). As shown in *Figure 9*, Keyes identifies 13 symptoms or outward signs of mental wellness that can be measured and used to "diagnose" whether an individual is languishing or flourishing, drawing upon the work of other notable psychologists in this field (e.g., Ryff's 6-factor model of psychological well-being,[1] Diener's tripartite model of subjective well-being,[2] etc.).[3]

In recent years, measures of "happiness" have received significant attention in public policy circles and in popular media, most notably from the annual United Nations *World Happiness Report*.[4] Measurements of happiness (including in the UN report) typically focus on emotional or subjective well-being – specifically, positive affect (being cheerful, interested in life, in good spirits, happy, full of life) and life evaluation (being satisfied with life overall or domains in life). These measurements focus narrowly on *hedonic* well-being, or having positive emotions towards one's life. As shown below, Keyes' proposed measures of mental wellness are much broader than just happiness, because they also incorporate *eudaimonic* well-being, or positive psychological and social functioning in life.

Figure 9

Keyes' 13 Factors for Measuring Mental Wellness[5]

Hedonic

Emotional/subjective well-being

- Positive affect
- Avowed quality of life (life satisfaction/ evaluation)

Eudaimonic

Psychological well-being

- Self-acceptance
- Personal growth
- Purpose in life
- Environmental mastery
- Autonomy
- Positive relations with others

Social well-being

- Social acceptance
- Social actualization
- Social contribution
- Social coherence
- Social integration

Endnotes

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Appendix C: History of Modern Mental Wellness Practices

Meditation is an ancient spiritual tradition with roots in all major religions.

Meditation has always been a spiritual practice, with ancient roots in all of the world's major religions. While it is most often associated with Buddhism, the first written records of meditation appeared around 1500 BC in the Vedas (sacred texts of Hinduism). Between 600-400 BC, Chinese Taoists and Indian Buddhists developed their own styles of meditation. Over the next millennium, Buddhism spread along the Silk Road throughout Asia, and meditative practices developed different forms as they adapted to different cultures across the continent – such as the spread of Zen Buddhism and Zazen (seated meditation) in Japan between 600-1300 AD. But meditation is not just an Asian tradition. In Judaism, the Torah describes an ancient meditative practice of "lasauch" in a field, and the Hebrew Bible contains many indications of Jewish meditation. During the Middle Ages, meditative practices developed among Jewish philosophers, mystics, and Kabbalists, while Sufism (Islamic mysticism) incorporated meditative techniques like breath control and repeating of mantras. During this era, Christianity also developed its own meditative practices of prayer, scripture reading, and contemplation, such as the "hesychasm" in the Eastern Orthodox mystical tradition and "Lectio Divina" in the Western Christian monastic tradition.

Eastern religion and meditation first reached the West during the 1700s-1800s AD, with advances in communications and transportation, along with the translation of major Eastern texts into European languages (e.g., Bhagavad Gita, Buddhist Sutras, Upanishads). It remained the domain of intellectuals and philosophers (e.g., Voltaire, Shopenhauer, Transcendentalists like Thoreau and Emerson) until the 20th century, when Eastern spiritual masters and gurus (e.g., Swami Vivekananda in the late-19th century; Paramahansa Yogananda in the 1920s; Swami Rama, Thich Nhat Hanh, and Maharishi Mahesh Yogi in the 1960s-1970s; Sri Sri Ravi Shankar in the 1980s) traveled and migrated to the United States and Europe to give lectures and courses, and to establish communities of followers (e.g., Vivekananda's Vedanta Societies, Rama's Himalayan Institute, Amrit Desai's Kripalu Institute, Shankar's Art of Living). In the 1960s-1970s, Maharishi Mahesh Yogi brought his discipline of secular Transcendental Meditation (TM) to the West. Maharishi became the "guru to the stars." He taught celebrities like The Beatles and the Beach Boys to meditate, and he made the word "mantra" a household word – sparking *Life Magazine* to call 1968 the "year of the guru," while *Time* featured TM as "a drugless high" in 1975.

The hippies, New Age, and counterculture movements embraced Eastern religions and practices, and these practices spread via television and media. For example, in the 1960s and 1970s, millions of Americans were introduced to yoga and meditation via the television, with pioneering programs such as Richard Hittleman's "Yoga for Health" and "Yoga and Meditation." As Eastern spirituality put down roots in the West into the 1980s and 1990s, many high-profile celebrities and athletes embraced and promoted meditation (e.g., Michael Jackson, Madonna, Demi Moore, Donna Karen, Shirley MacLaine, Joe Namath, Phil Jackson, Deepak Chopra, Oprah). Meditation shed its hippie associations and became increasingly hip, secularized, and accessible to a mainstream audience.

In 1979, Jon Kabat-Zinn founded the Mindfulness-Based Stress Reduction Clinic at the University of Massachusetts Medical Center, bringing Buddhist meditation into medicine and Western science; secularizing it; and connecting it with self-improvement, personal growth, recovery, relaxation, and stress reduction. Kabat-Zinn, along with the many meditation centers and ashrams that popped across the United States in the 1960s-1970s, laid the groundwork for proliferation of a secular meditation and mindfulness movement in the West, as well as the application of these techniques in medicine and psychotherapy (e.g., mindfulness-based cognitive therapy, mindfulness-based pain management). Science, medicine, and research started paying more attention to the practice, and it was increasingly promoted as scientific and health-enhancing. The first physiological studies of meditation took place in the 1950s-1960s, and the first clinical studies followed in the 1970s. Great strides have been made in recent decades in demonstrating meditation and mindfulness's effectiveness on cognitive abilities, neuroplasticity, attention, memory, resiliency to stress, mood, emotional regulation, depression, anxiety, and a variety of other mental and physical disorders.[1]

In the last two decades, the proliferation of yoga as a popular exercise and wellness activity has helped to introduce millions of Western consumers to secularized meditation techniques, and meditation is an increasingly common offering in gyms, fitness centers, spas, and dedicated studios. Silicon Valley and the corporate world have latched on to mindfulness as an employee wellness offering and productivity-boosting measure – a phenomenon that some criticize as "McMindfulness," or the co-opting of Buddhist spiritual practices as a capitalist commodity. Apps and social media are also playing a major role in spreading awareness of and access to meditation practices in countries around the world. For a relatively low monthly cost, and even for free, these apps provide convenient content that is accessible to those who may be new to meditation and mindfulness practices. Partnerships between major apps and on-demand services (e.g., Calm, Headspace, Insight Timer, eMindful) and major companies across dozens of industries are now delivering their content through corporate wellness programs, insurance programs, in schools, on airplanes, in hotels, and even through media platforms like Spotify, HBO, and Netflix.

Self-help is rooted in ancient literature, philosophy, and religion.

Nearly every major civilization has produced their own version of "wisdom literature" or "conduct books," in which sages and intellectuals provided maxims and guidance on virtue, divinity, the meaning of life, social norms, and practical advice on living. The earliest version of self-help is ancient Egypt's "sebayt," a genre of pharaonic literature that contained teachings on ethical behavior and self-control (between 3000-1000 BC) – such as the *Instructions of Kagemni* or the *Maxims of Ptahhotep*. Some of the oldest and most famous examples of wisdom literature are found in the Hebrew Bible and Christian Old Testament (the books of Job, Psalms, Proverbs, Ecclesiastes, Song of Solomon, etc.). Ancient Greek and Roman philosophers produced meditations, aphorisms, proverbs, and maxims on personal ethics, the power of the human mind, and the nature of life – from Plato, Aristotle, and Socrates, to the Greek Stoics and Marcus Aurelius' *Meditations*. In India, ancient Sanskrit literature is full of verses and epigrams on morals, ethics, and conduct, while the *Bhagavad Gita* is seen as a practical guide for implementing Vedic wisdom in everyday life. China is rich with its own ancient wisdom traditions and philosophers (Confucius, Lao-Tzu) and texts (e.g., *I Ching*, *Tao Te Ching*). In the Middle Ages and Renaissance, "mirror-of-princes" texts told stories of leaders whose behavior should be imitated or avoided (the most famous being Machiavelli's *The Prince*).

The development of the printing press launched the modern era of the self-help book. From the 1600s to the 1800s, "conduct books" (which derived many concepts from ancient wisdom literature) proliferated across the Western world, teaching men about ambition, self-reliance, and success, and advising women on domesticity, marriage, parenting, and female virtues. In 1859, Samuel Smiles' *Self-Help* became the best-selling book other than the Bible. Smiles' book is credited with coining the name of the "self-help" genre and set the tone for its potential in the publishing industry (selling over a quarter of a million copies by 1904). A number of self-help bestsellers appeared in the early 20th century, including James Allen's *As A Man Thinketh* (1903), Dale Carnegie's *How to Win Friends and Influence People* (1936), Napoleon Hill's *Think and Grow Rich* (1937), and Norman Vincent Peale's *The Power of Positive Thinking* (1952). By this point, self-help diverged from literature and became its own genre – in fact, self-help was rejected by academics and researchers as not being "original work" and for merely recycling text and concepts from other writers and philosophers. Alcoholics Anonymous was founded in 1935, marking the beginning of the group-based self-help and recovery movement.

The 1960s and 1970s (the "Me Decade"[2]) mark the take-off and golden age of self-help. The narratives of recovery, self-care, and self-actualization started to permeate mainstream culture, and self-help shifted away from pragmatic "how-to-ism" and started to embrace mysticism, spirituality, and psychology. In the United States, the hippies and Baby Boomers embraced holistic philosophies and health, Eastern and occult spirituality, alternative lifestyles, and humanistic psychology. During this era, the Human Potential Movement developed as a "counter-cultural rebellion against mainstream psychology and organized religion. It is not in itself a religion… but a psychological philosophy and framework, including a set of values that have made it one of the most significant and influential forces in modern Western society."[3] The Human Potential Movement built upon and spread Abraham Maslow's and Carl Rogers' concepts of self-actualization, the pursuit of fulfillment, the untapped potential that lies in all people, and an emphasis on healthy people over pathological behavior. The movement and its champions (such as California's Esalen Institute) had a major influence in bringing Eastern spirituality, meditation, mind-body concepts, self-improvement, personal development, and other "fringe" mental wellness practices into mainstream culture; into workplaces and corporate training (bringing a new emphasis on human capital and creativity); into the self-help genre; and also into the fields of psychology, therapy, and social work.

As the popularity of self-help surged into the 1980s-1990s, it became increasingly guru-driven. People started to replace priests, therapists, and doctors with media celebrities, writers, and gurus (e.g., Tony Robbins, Stephen Covey), who helped give them names to their problems and translated elite knowledge and esoteric theories into bite-sized and accessible concepts. Some self-help gurus built up millions of followers via TV broadcasts – for example, Tony Robbins's "Personal Power" infomercial gave him worldwide exposure and reached 100 million Americans from 1988-1991. Oprah's media empire has played an outsized influence in bringing pop psychology and self-improvement concepts to a mainstream audience worldwide, turning a number of personalities into best-selling self-help gurus (e.g., Suze Orman, Dr. Phil, Deepak Chopra). The recent rise of social media and wellness/self-help "influencers" (e.g., Gwyneth Paltrow) has taken this guru phenomenon to a new level, and even TED Talks have become a new medium for self-help advice. Established self-help personalities and gurus now deliver their teachings not only through books and classes, but through web channels, social media, streaming apps, speaking engagements, workshops, retreats, television channels, and more.

The rise of digital media has not squashed the enduring popularity of the self-help book. In recent decades, self-help has become one of the most lucrative genres in the publishing industry, with approximately 150 new titles published every week.[4] In both books and media, self-help concepts have become so pervasive that they are no longer confined to a designated "self-help" category: "Today, every section of the store (or web page) overflows with instructions, anecdotes, and homilies. History books teach us how to lead, neuroscience how to use our amygdalas, and memoirs how to eat, pray, and love. The former CEO of CNN writes the biography of an ornery tech visionary and it becomes a best seller on the strength of its leadership lessons. The Nobel-laureate psychologist Daniel Kahneman writes a subtle analysis of our decision-making process and soon finds his best seller digested and summarized in M.B.A. seminars across the country. Philosophical essayist Alain de Botton launches a series of self-help books called 'The School of Life,' whose titles will all begin with 'how to.' Even before books are written, their advances are often predicated on strong 'takeaways' targeted to proven demographics."[5] The merging of self-help into social science, science, business, memoirs, and other genres helps bring credibility to the field and expands its appeal to those who would not usually read the genre (e.g., men). Some major publishing houses are creating new imprints focused on self-help, and are rebranding the category as "self-improvement," "personal development," and "mind-body-spirit" to expand its appeal among Millennials and a new generation of consumers.[6]

Coaching originated in the 20th century, based in organizational development, psychology, and sports.

Coaching also has some ancient roots, although it did not take shape as a discipline until the late-20th century. The concept of "coaching" from a sports perspective originated in ancient Greece, when athletes were supported in gymnasiums by elite former champions. The concept of "mentoring" also has roots in ancient Greek philosophy: the first recorded mention of a "mentor" appeared in Homer's *Odyssey*, associating the word with a wise and trusted advisor or friend. The word "coach" was first applied to a person in the 1830s, when students at Oxford University used it as slang for the tutors who helped them toward their goal of passing exams. But from the 1860s onwards, the word was almost exclusively associated with sports coaching.

The concept of "business coaching" or "life coaching" emerged in the 20th century. In the 1930s-1960s, U.S. businesses became interested in using psychology to improve performance and productivity. They hired organizational and occupational psychologists to counsel their senior executives, helping them to overcome obstacles and improve performance. As the field of organizational development and psychology grew in the 1960s and 1970s, leadership programs, assessment centers, and books emerged to support businesses in these endeavors. During this time, the growth of humanistic psychology and the Human Potential Movement (which built upon Maslow and advocated for humans' ability to unleash their untapped potential) started shifting businesses' focus toward treating people well and expanding their potential, rather than just productivity and performance improvements.

In the 1970s-1980s, sports coaching played a major role in the emerging field of business and life coaching. Tim Gallwey's 1974 book, *The Inner Game of Tennis*, revolutionized the coaching discipline with the idea that a player's inner psychological attitude is just as important as his outer physical skills. This concept was embraced by the business world, who brought in Gallwey to provide training for employees; in the UK it was adapted by Graham Alexander and John Whitmore into the GROW model, which became a foundational model for most coach training programs today. American financial planner Thomas Leonard is credited with developing life coaching as a modern profession. In 1992, Leonard founded the first formal coach training program, Coach U, which remains one of the leading professional coach training schools in the world. Leonard also founded the International Coach Federation in 1995, the first body to set industry standards and ethics, provide coach credentialing, and accredit coaching schools. Over the last couple of decades, coaching has had an explosion of interest and has built upon new developments in the psychology field, such as Martin Seligman's positive psychology. It has become a recognized discipline, with professional associations, peer-reviewed journals, and training programs and university courses all over the world. Coaching has expanded from the business arena into all areas of life, with specialized disciplines such as leadership coaching, team coaching, career coaching, life coaching, personal development coaching, relationship coaching, and so on.

The link between physical and sensory materials and mental wellness and healing has been understood since ancient times.

Ancient civilizations and spiritual traditions from all corners of the globe have made connections between the sensory world, mental and physical healing, the human condition, and the divine. Sensory stimuli – via sound, light, aroma, touch, and energy – have long been believed to improve mental and physical well-being and to awaken spiritual consciousness.

- Belief in the power of **sound** has existed since the beginning of recorded history, and most cultures' creation myths begin with some type of sonorous event. Indigenous cultures and spiritual traditions in all corners of the globe have used sound in their healing ceremonies (e.g., drumming, handclapping, singing, chanting, Tibetan singing bowls, Australian didgeridoo, Peruvian whistling vessels, West African djembe, gongs, rainsticks, bells, etc.). Recent research has found that many ancient temples and spiritual sites around the world (e.g., Egyptian pyramids, Greek temples and sanatoria, Gothic cathedrals, Islamic mosques) have been built with acoustical resonance properties and vibrating frequencies that promote calmness and mental composure and harness the healing energies of sound.[7] The Chinese character for medicine (藥) incorporates the character for music (樂) – and the character for music also refers to the concepts of happiness, pleasure, and enjoyment – an indication that the Chinese have recognized the connection between music, happiness, and healing since ancient times.[8]
- **Light and color** have been used in healing for over 4,000 years. The Chinese attach symbolic meanings to different colors and believe that color is a cosmic energy (Qi) that can shape humans' energy and destiny. In Ayurvedic medicine, the chakras, or internal energy centers, are associated with different colors. Light and color therapy was practiced in ancient Egyptian temples. Heliopolis, the Greek "city of the sun," was famous for its healing temples that broke sunlight into the color spectrum, with different colors used for treating different ailments. Hippocrates wrote the first texts on the benefits of sunlight for mood and mental health; he prescribed sunbaths and built a solarium to be used for treating various maladies.
- Many ancient cultures used **aroma** for religious and healing purposes. In prehistoric times, people burned aromatic herbs, woods, and barks ("smoking") to drive the evil spirits out of sick people. Ancient Egypt is considered the birthplace of aromatherapy and essential oils; they used fragrances and perfumes in festivals, used aromatic herbs in embalming, and burned incense to honor their gods. Around the same time, herbs and aromatic plants were incorporated as an essential component of the Indian Ayurvedic system. The ancient Greeks and Romans used herbs and essential oils for aromatic hot water and vapor baths, to soothe the nerves and treat fatigue and other ailments. Hippocrates studied the properties of 200 herbs and incorporated them into healing baths, massage, and other physiotherapies.
- **Crystals and gemstones** were first used in spiritual and healing ceremonies in ancient Sumeria (4000-2000 BC) and in traditional Chinese medicine (beginning around 3000 BC). In ancient Egypt, people wore certain gemstones in jewelry for protection and health, to promote wisdom and knowledge, to honor the gods, and to purge evil spirits. Ancient Greek beliefs play a large role in our modern understanding of healing stones; the word "crystal" is derived from the Greek word "krustallos," because they believed that clear crystals were eternal ice sent from the heavens. The use of healing stones continued into the Middle Ages and Renaissance, when *Lapidaries* were compiled to explain the properties and uses of various stones and gems – including not just physical properties, but also metaphysical, spiritual, and astrological properties (from warding off diseases to promoting particular mental states).
- **Fidget and stress objects** primarily originated in China. During the Han Dynasty (202 BC-220 AD) and Song Dynasty (906-1279 AD), warriors would squeeze walnuts and balls carved from stone and metal to stay focused during battle. Baoding balls, or Chinese medicine balls, appeared during the Ming Dynasty (1368-1655 AD) – the first time an object was mass-produced and sold specifically for meditative and stress relief purposes. Made of iron, jade, or stone, Baoding balls were decorated with designs that encouraged relaxation, harmony, and health, and they were rolled in the hands to make a soothing sound. Worry stones (rubbed between the thumb and forefinger to promote relaxation) have been used in cultures around the world, from Native American tribes, to Ireland, to Tibet. Prayer beads are believed to have originated among the Hindus in India, but

have spread to every major religion (e.g., Buddhist japamala, Islamic misbahah, Catholic rosary) and are used for counting prayers, meditation, and maintaining focus. Komboloi (worry beads) have long been used in Greek and Cypriot culture. While they may have derived from prayer beads, they have no religious or ceremonial significance today and are used for relaxation, passing the time, and to guard against bad luck. Modern stress balls were developed and mass marketed in the 1980s, followed by many other fidget toys and fads (such as fidget spinners around 2015).

Sensory-based healing was first explored by science in the 1600s-1800s, when European scientists made a variety of new discoveries about the nature of light and color (e.g., refraction, polarization of light, and infrared and ultraviolet radiation) – helping to bring phototherapy and chromotherapy into the modern age. European and American sanatoria treated patients with sun baths (heliotherapy) in the late-19th and early-20th centuries. Aromatherapy and essential oils were studied by European scientists at the beginning of the 20th century and were used to treat soldiers during WWI and WWII. Music therapy began in the United States in the 1940s, when it was used as a recovery treatment for soldiers after WWII. But with the solidification of modern medicine and modern psychology – and their emphasis on drugs over natural remedies, treatment over prevention, and matter over energy – these types of sensory and energy-based healing modalities largely fell out of favor until the mid-20th century.

Sensory healing had its resurgence in the 1970s with the the New Age movement. The hippies' interest in alternative therapies, natural medicine, and ancient traditions brought a new wave of interest in sound healing (e.g., chanting, singing bowls, vibro-acoustic furniture), energy healing, crystals, worry stones, essential oils, and aromatherapy. Around the same time, the ability of scientists to study these practices improved, and today there is a growing body of research evidence on the mental and physical health benefits of sound, light, aroma, energy, and touch. Light therapy has been most validated and integrated into modern psychiatry and medicine (e.g., for depressive disorders, seasonal affective disorder, sleep disorders, skin conditions, etc.), while most other sensory healing modalities have remained on the fringes of conventional medicine and psychology (although they are now seeing a new wave of attention from the scientific community[9]). The modern wellness industry – especially hospitality and spas – have played a leading role in bringing sensory healing to a wider, mainstream audience, such as using color, light, music, and aroma to create healing and stress-relieving environments, and developing treatments and classes based upon sensory modalities (e.g., sound baths, LED light treatments, aromatherapy and crystals in massage and spa treatments, reiki and energy healing treatments, etc.).

Humans have used mind-altering drugs since prehistoric times, for religious, healing, and recreational purposes.

According to Michael Pollan, "There is not a culture on earth… that doesn't make use of certain plants to change the contents of the mind, whether as a matter of healing, habit, or spiritual practice… plants and fungi with the power to radically alter the consciousness have long and widely been used as tools for healing the mind, for facilitating rites of passage, and for serving as a medium for communicating with supernatural realms, or spirit worlds."[10] Archaeological evidence indicates that mind-altering drugs, including mushrooms, opium, and cannabis, have been used by humans for as long as 10,000 years. Psychoactive plants have played a role in the very foundations of many religions and have been at the center of religious and sacramental rituals for millennia (such as their use by priests and shamans to induce dissociative trances). For example, Soma (a hallucinogenic ritual drink) is mentioned more than 100 times in the *Rigveda*, the oldest foundational sacred text of Hinduism. From ancient to modern times, opium and cannabis have been the most commonly-used drugs throughout the world, for both recreational and healing purposes. Cannabis was cultivated and used in Central Asia and China more than 5,000 years ago. Opium was cultivated by the ancient Sumerians from around 3400 BC, and they referred to it as “Hul Gil” or the “joy plant.” Indigenous cultures around the world have long utilized endemic plants for their mind-altering and psychoactive properties, such as coca leaf in South America, peyote among Native Americans, nutmeg in South and Southeast Asia, blue lotus in ancient Egypt, and mushrooms in Mesoamerica and North Africa.

For most of history, these drugs were seen as natural, and not something to be feared or controlled. They were just another part of a plant that could be used for healing, to enhance human emotion and consciousness, or to connect with the divine. Use of psychedelics, stimulants, and other types of drugs with mental effects has long been a common cultural practice across many parts of the world – such as hashish in the Middle East, khat in Africa and the Arabian peninsula, kava in the Pacific region, and betel nut across South and Southeast Asia, as well as ubiquitous use of alcohol, nicotine, and caffeine throughout the world. While incidences of drug abuse have been recorded since ancient times, it was not until the 1700-1800s that addiction started to be recognized as a public health problem, and attempts to control or ban certain drugs became more widespread (e.g., government measures to restrict sale and use of opium in the 18^{th}-19^{th} centuries). Today, drug abuse disorders are widespread (an estimated 35 million people globally) – with serious health, social, and economic implications – and production, distribution, sale, and non-medical use of psychoactive drugs are widely banned throughout the world.[11]

Cannabis, opium, and cocaine were widely used in Western medicine starting in the 19^{th} century, to treat pain, melancholia, nervous disorders, insomnia, and many other physical ailments. Modern scientists started to pay attention to the potential of psychedelic drugs in the mid-20^{th} century, after Swiss scientist Albert Hofmann first synthesized LSD (1938) and discovered its psychoactive properties (1943). During the 1950s and 1960s, LSD, psilocybin, and mescaline were used in psychotherapy to treat thousands of patients. Psychedelics were actively studied by scientists in the United States, Canada, and Europe, with promising results for treating depression, anxiety, trauma, addiction, and other disorders. However, medical use and research on psychedelics halted abruptly at end of the 1960s, when possession and use of LSD and mushrooms were banned by the U.S. government (and then became listed as Schedule I drugs by the United Nations in 1971), in response to the widespread recreational use of drugs among the counterculture movement, and rising concern about drug abuse and its negative impacts.

The last 20 years have brought a renewed interest and a resurgence of scientific and clinical research on the potential for cannabis and psychedelic drugs (especially psilocybin, ketamine, and MDMA), although legal restrictions and socio-cultural sensitivities about drugs continue to put a damper on widespread research and therapeutic uses. Decriminalization and liberalization of drug laws across many countries (e.g., legalization of medical marijuana in more than 30 U.S. states) have also created a rapidly-growing private and grassroots market for recreational and wellness-driven drug use – for example, an ever-growing array of over-the-counter cannabidiol (CBD) products; microdosing of psychedelics for boosting energy, creativity, and brain performance; and even a burgeoning niche market for psychedelic retreats and tourism.

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Appendix E: Acknowledgements

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Industry Research Sponsors

HYATT

Holistic wellbeing is at the core of Hyatt's purpose, to care for people so they can be their best, across all of our brands and stakeholders. We continue to prioritize the need and desire for our colleagues and guests to practice mental wellbeing and self-care with initiatives like our Headspace partnership, which brings meditation and mindfulness content to colleagues and guests; digital experiences from our wellbeing brand Exhale; and wellbeing services like digital mindfulness programming at Miraval. Visit: www.hyatt.com.

BIOLOGIQUE RECHERCHE

Through our involvement with the Global Wellness Institute's Mental Wellness Initiative, we encourage all of you to become part of its mission to help empower and communicate mental wellbeing to those around you. The Mental Wellness Initiative believes that through the exchange of knowledge, we can promote and support lifelong growth, happiness, creativity, inner peace, compassion and wisdom. This can be achieved collectively through individual actions. Visit: www.biologique-recherche.com

OSTEOSTRONG

OsteoStrong is a biohack that helps you strengthen the foundation of your body – the skeletal system. The skeletal system is arguably one of the most critical systems of the human body. By implementing Osteogenic Loading to strengthen it, many experience improved bone density, posture and balance plus less joint and back pain. OsteoStrong Centers are opening worldwide for people of all ages and levels of activity. For locations and franchising opportunities please visit www.osteostrong.me.

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When our founders created Aromatherapy Associates 35 years ago, their vision was to improve wellbeing through the natural power of aromatherapy. Our founders were also passionate about fulfilling a greater need and doing good in the world. Now with BCorp certification, we represent the highest standards of environmental and social impact. For Aromatherapy Associates, it's not about just being the best in the world, but also the best for the world. Visit: www.aromatherapyassociates.com.

DELOS

As the pioneer of Wellness Real Estate™, Delos is transforming our homes, offices, schools and other indoor environments by placing health and wellness at the center of design and construction decisions. Delos helps create spaces that actively contribute to human health, performance and wellbeing by marrying the best innovations in technology, health, science and real estate. The Delos platform includes programming, consulting, research, and an array of innovative products and technologies that research suggests may improve occupant wellbeing. Visit: www.delos.com.

EMINDFUL

eMindful delivers evidence-based mindfulness programs for everyday life and chronic conditions. With 12+ years of data-driven insights and consistent results at improving health, productivity and healthcare costs, eMindful partners with Fortune 500 employers and leading health plans to help individuals make every moment matter with the skills for greater focus, creativity and purposeful decisions. Published research and outcomes are available at emindful.com.

JOHN W. BRICK MENTAL HEALTH FOUNDATION

The John W. Brick Mental Health Foundation is changing the way the world treats mental health. Our purpose is to integrate holistic approaches such as exercise, nutrition and mind-body practices into the mental healthcare delivery system. We do this by funding and promoting evidence-based research on how exercise, nutrition and mind-body practices benefit mental health resilience, supporting initiatives that integrate evidence-based holistic approaches into mental healthcare, and advancing a collaborative roadmap for an integrated approach to mental healthcare. Visit: www.johnwbrickfoundation.org

KOHLER

Your very own way to well begins in the Village of Kohler, WI, a welcoming community with the only five-star experiences in the state. Guests escape here to enjoy world-class yoga, indoor cycling, the Kohler Waters Spa, 500 acres of unspoiled wilderness, tranquil gardens and miles of biking paths. Destination Kohler features unmatched hospitality and a variety of accommodations with countless, authentic opportunities to connect to a higher sense of physical, emotional and personal wellness. Visit: www.kohler.com.

MINDBODY

MINDBODY is the leading technology platform for the fitness, beauty and wellness services industries. Local entrepreneurs worldwide use MINDBODY's integrated software and payments platform to run, market and grow their businesses. Consumers use MINDBODY to more easily find, engage and transact with fitness, wellness and beauty providers in their local communities.

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RANCHO LA PUERTA

Founded in 1940, Rancho La Puerta Fitness Resort and Spa in Tecate, Baja California, Mexico, pioneered the concept of a true destination spa, for both its guests and employees. Over 440 employees and their families are part of the Employee Wellness Program, which provides daily fitness classes, complimentary medical services, and healthy living workshops. Visit: www.rancholapuerta.com.

RANCHO MISSION VIEJO

Rancho Mission Viejo, a 23,000-acre master planned community in south Orange County, California, is intentionally developed on a foundation of wellness. The Ranch promotes living well with incomparable access to nature, amenities, people and programs that make pursuing all dimensions of wellness a part of every age and stage of life. The land is our brand – 17,000 acres of it are permanently preserved through the Reserve at Rancho Mission Viejo, ensuring it remains so, forever. Visit: www.ranchomissionviejo.com

SIX SENSES

Six Senses Hotels Resorts Spas are discovered in some of the world's most beautiful places. They are synonymous with a unique style – authentic, personal and sustainable, and in harmony with individual surroundings; local, yet in tune with the wider world. They are intimate, offering an emotionally intelligent approach to anticipative service, which supports delightful and unexpected surprises. Crafted guest experiences stimulate, energize and revitalize the human spirit; spa and wellness programming is all pervasive. All aspects of Six Senses' operations, including the Evason brand, embrace these values, which define the brand and the enduring Six Senses mission: To help people reconnect with themselves, others and the world around them. Visit Six Senses at www.sixsenses.com.

UNIVERSAL COMPANIES

Founded in 1982 by Marti Morenings, Universal Companies is the leading single-source supplier to more than 56,000 spa professionals in 47 countries. Continuously innovating, we've developed a robust educational platform, exclusive brand partnerships, and customer retail strategies. Spa development and expansion are core components of our service offerings. With innovative wellness equipment becoming increasingly important to spa operations, our team researches and develops the latest technologies and seamlessly integrates them into new or existing operations. Visit: www.universalcompanies.com.

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APPENDIX C

HOW CAN WE STAY HEALTHY WHEN

OUR BUILT ENVIRONMENT

IS WORKING AGAINST US?

ENVIRONMENT

Toxic air, water, soil, & materials

Light & noise pollution

Climate change & resource depletion

SOCIAL/COMMUNITY

Loneliness & social isolation

Economic insecurity & inequality

Polarization & lack of trust

PERSONAL/BEHAVIORAL

Sedentary & unhealthy lifestyle

Digital overload & stress

Disconnection from nature & heritage

URBAN UNWELLNESS

Intensive air, water, noise, & light pollution

Overcrowding & lack of tranquil space

Luxury versus slums

Limited amenities for the non-rich

SUBURBAN UNWELLNESS

Separation of home from daily activities

Car dependency & sprawl

Limited walkability

Social isolation & segregation

CHILDREN & TEENAGERS

Childhood obesity

Teen anxiety & depression

Lack of independence

WORKING ADULTS

Long commutes

Always on, 24/7 work culture

Rising stress & unhappiness

SENIORS

Decreased mobility

Increased medical needs

Isolation from friends & family

GLOBAL WELLNESS INSTITUTE™

Source: Global Wellness Institute Report: "Build Well to Live Well: Wellness Lifestyle Real Estate and Communities," January 2018.

THE COSTS OF OUR UNHEALTHY BUILT ENVIRONMENT ARE STAGGERING AND UNSUSTAINABLE

PERSONAL/BEHAVIORAL

- Lack of physical activity (25% of adults and 80% of adolescents) costs over **$67.5** billion each year in health expenditures and lost productivity.
- **38%** of Americans say they lack outdoor spaces in their community to walk or exercise.

SOCIAL/COMMUNITY

- **25-40%** of households are single in the United States, Western Europe, Japan, and South Korea.
- **25%** of Americans have no close friend to confide in.
- Depression, a leading cause of illness and disability, increased **18%** from 2000-2015 worldwide.

ENVIRONMENT

- A hazardous environment causes **24%** of global disease and **13** million deaths every year.
- Air pollution kills **2.2** million in China and India every year.

URBAN UNWELLNESS

- **88%** of urban dwellers are exposed to unhealthy levels of pollution.
- City life increases the risk of mental illness in children and adults.

SUBURBAN UNWELLNESS

- Each hour spent in a car per day increases obesity risk by **6%.**
- Suburban dwellers walk less, drive more, weigh more, and are more likely to be hit by a car.
- Sprawl costs the American economy more than **$1** trillion annually.

CHILDREN

- Only **13%** of American children walk or bike to school, as compared to 48% in 1969.
- Australian children spend less than **2** hours a day outside but **4.5** hours in front of a screen.
- **2/3** of Chinese children do not meet recommended guidelines for daily physical activity.

WORKING ADULTS

- Every **10** minutes spent commuting results in **10%** fewer social connections.
- Prolonged sitting raises the risk of cardiovascular disease by **14%**, cancer by **13%**, and diabetes by **91%**.
- **33%** of full-time workers find it difficult to maintain work-life balance (across the United States, United Kingdom, India, Japan, China, Germany, Mexico, and Brazil).

SENIORS

- **63%** of older people find it hard to access healthcare (across **32** countries in Africa, Asia, Europe, and the Caribbean).
- **17%** of seniors in England have contact with another person less than once a week.
- Only **1%** of U.S. housing stock is adequately equipped to meet the needs of seniors.

GLOBAL WELLNESS INSTITUTE™

Source: Global Wellness Institute Report: "Build Well to Live Well: Wellness Lifestyle Real Estate and Communities," January 2018. Data aggregated by GWI from the sources listed in Endnote ix and the Bibliography.

APPENDIX D

GLOBAL WELLNESS INSTITUTE™

EMPOWERING WELLNESS WORLDWIDE

Global Wellness Economy Monitor

OCTOBER 2018

Global Wellness Economy Monitor

OCTOBER 2018

GLOBAL WELLNESS INSTITUTE™
EMPOWERING WELLNESS WORLDWIDE

CONTENTS

ABOUT THE AUTHORS

ABOUT THE GLOBAL WELLNESS INSTITUTE

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

www.globalwellnessinstitute.org

ABOUT THE AUTHORS

The *Global Wellness Economy Monitor* was prepared by Ophelia Yeung and Katherine Johnston, Senior Research Fellows at the Global Wellness Institute. Together, they have four decades of experience leading research and strategy development for businesses, universities, research institutions, and multilateral and government organizations under the auspices of SRI International, a Silicon Valley-based technology and innovation company. Since 2008, Ms. Yeung and Ms. Johnston have worked with the team at what has become the Global Wellness Institute to pioneer groundbreaking research on the global wellness economy and its subsectors. They were assisted in this research by Tonia Callender, GWI Research Fellow.

Global Wellness Economy Monitor

Executive Summary

OCTOBER 2018

GLOBAL WELLNESS INSTITUTE™
EMPOWERING WELLNESS WORLDWIDE

EXECUTIVE SUMMARY

Valued at $4.2 trillion in 2017, the wellness economy continues to expand faster than global economic growth.

The Global Wellness Institute (GWI) defines wellness as ***the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health.*** In 2014, GWI published the first Global Spa & Wellness Economy Monitor, measuring the size of the global wellness economy for the first time. ***The wellness economy encompasses industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives.*** We include ten sectors in the global wellness economy (see figure below), which together are worth $4.2 trillion in 2017, representing 5.3% of global economic output.[1] By comparison, global health expenditures were estimated at $7.3 trillion in 2015.[2] From 2015-2017, the wellness economy grew from $3.7 trillion to $4.2 trillion, or by 6.4% annually, a growth rate nearly twice as fast as global economic growth (3.6%).[3]

GLOBAL WELLNESS ECONOMY: $4.2 trillion in 2017

Note: Numbers do not add due to overlap in segments. Dark colored bubbles are the sectors for which GWI conducts in-depth, country-level primary research. Light colored bubbles are sectors for which GWI aggregates global estimates only, drawing from secondary sources. Source: Global Wellness Institute.

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[1] See *Appendix A* for definitions of the ten wellness economy sectors.

[2] Global health expenditures data from: WHO, *Global Health Expenditures Database,* http://apps.who.int/nha/database/Home/Index/en. 2015 is the most recent year available.

[3] Global GDP data from: IMF, *World Economic Outlook Database,* April 2018 Edition, https://www.imf.org/external/pubs/ft/weo/2018/01/weodata/index.aspx.

Since 2014, GWI has extended its detailed market estimates to include five wellness economy sectors: *Wellness Real Estate*, *Workplace Wellness*, *Wellness Tourism*, *Spa,* and *Thermal/Mineral Springs*. For the other five sectors, we aggregate secondary global industry data from multiple sources to arrive at the estimated market size. This report provides original data and discusses the development and prospects of the five wellness sectors that GWI tracks in detail.

Wellness Economy Sectors, 2015 and 2017

	Market Size (US$ billions)		**Average Annual Growth Rate**
	2015	**2017**	**2015-2017**
Personal Care, Beauty, & Anti-Aging	$999.0	$1,082.9	4.1%
Healthy Eating, Nutrition, & Weight Loss	$647.8	$702.1	4.1%
Wellness Tourism	$563.2	$639.4	6.5%
Fitness & Mind-Body	$542.0	$595.4	4.8%
Preventive & Personalized Medicine and Public Health	$534.3	$574.8	3.7%
Traditional & Complementary Medicine**	**$199.0	**$359.7	**
Wellness Real Estate***	$118.6	$134.3	6.4%
Spa Economy *(Spa Facilities)*	$98.6 *($77.6)*	$118.8 *($93.6)*	****9.8% ****(9.9%)
Thermal/Mineral Springs	$51.0	$56.2	4.9%
Workplace Wellness	$43.3	$47.5	4.8%
Wellness Economy	***$3,724.4**	***$4,220.2**	**6.4%**

** Figures do not sum to total due to overlap in segments.*

*** The definition and measurement of this sector has changed from 2015 to 2017, and so the two numbers should not be directly compared as a time series. In 2017 we have incorporated an expanded measurement of traditional medicine into this sector (e.g., Traditional Chinese Medicine, Ayurveda, etc.) due to improved global data availability on those segments. 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.*

**** The name for this sector has changed from 2015 to 2017, based on the methodology elaborated in GWI's recent "Build Well to Live Well" report. It is now labelled "wellness real estate" to emphasize that the measurement includes residential AND commercial/institutional building, as opposed to "wellness lifestyle real estate" (which focuses on the residential component).*

***** The high growth rate for spa revenues is not entirely due to new builds, but also due to a dramatic increase in the number of hotels/resorts listing themselves and their spa facilities/services on global online booking sites, especially in emerging market countries.*

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

The environments in which we live, work, and travel are critical yet largely underappreciated determinants of our wellness.

Our health is a result of complex interactions among genetic factors and numerous interrelated external determinants (e.g., socio-economic factors, our physical environment, access to healthcare). These external factors form a complex "wellness ecosystem"[4] that can augment or reduce the impacts of our genes. What may be surprising from recent research findings is that genetics may account for as little as 10-15% of our health outcomes, while external and environmental factors play a much more important role.[5] There is ample and growing evidence that our health and longevity are greatly affected by the physical environments in which we live, work, and travel, and yet these environments continue to receive scant attention from the medical community. This lopsided investment calculus needs to change. To combat the growing epidemic and escalating costs of chronic disease, we must address the many aspects of our daily environments that drive our individual and collective health and wellbeing.

Wellness sectors are no longer siloed industries. They will increasingly converge as we integrate wellness into our homes and communities, our work, and our travel.

All ten wellness sectors are dynamic and interconnected, intrinsically linked to the wellness economy as a whole. In the face of longer lifespans, rising chronic disease, stress, and unhappiness, we are reexamining our lives and refocusing our attention on what makes us well – particularly the places and manner in which we live, work, and travel. The wellness economy mirrors those shifting priorities, alongside a growing recognition of the critical impact of external environments on our health and wellbeing. Among the ten wellness economy sectors, three of them represent those critical, interrelated environments in which we live our daily lives – *wellness lifestyle real estate and communities* (live), *workplace wellness* (work), *and wellness tourism* (travel). However, the other seven wellness sectors do not operate independently from, or outside of, these spheres. They are all essential components of a **"wellness ecosystem"** that nurtures a lifestyle of wellbeing and longevity, because we consume wellness goods and services in the homes and communities where we live, where we work, or when we travel. As we integrate wellness into all aspects of our daily lives, we can expect increasing convergence of all wellness sectors into these three core spheres, through acquisitions, partnerships, horizontal/cross-category expansions and innovations, and emergence of new business models.

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[4] See: Institute of Medicine (2006). *Genes, Behavior, and the Social Environment: Moving Beyond the Nature/ Nurture Debate.* Washington, DC: The National Academies Press.

[5] See: Global Wellness Institute (2018). *Build Well to Live Well: Wellness Lifestyle Real Estate and Communities.*

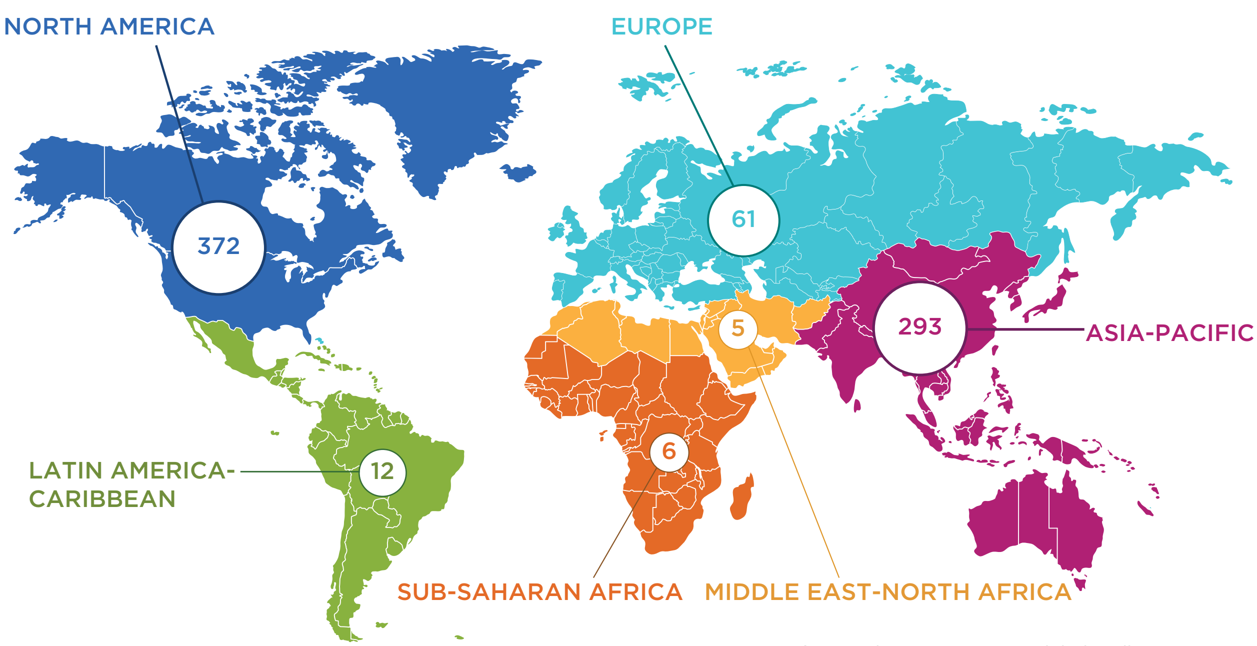
Wellness real estate is a fast-growing $134 billion industry, buoyed by rising health consciousness and a desire to bring wellness into the places where we spend the majority of our time.

Earlier in 2018, GWI unveiled the research report Build Well to Live Well, where we defined wellness real estate as ***the construction of residential and commercial/institutional properties that incorporate intentional wellness elements into their design, materials, and building as well as their amenities, services, and/or programming.*** GWI estimates that the global wellness real estate sector is worth $134 billion in 2017, growing at 6.4% annually since 2015. For comparison, this is about 1.5% of the total annual global construction market and about half the size of the global green building industry.[6] Note that wellness real estate is broader than (but encompasses) wellness lifestyle real estate, which focuses on the residential component.[7]

GWI's research found more than 740 wellness lifestyle real estate and community developments built, partially built, or in development, across 34 countries as of November 2017, and this number is growing every day. These include master-planned communities, multi-family housing, urban districts and mixed-use projects, resort- and spa-based real estate, and other types of projects around the world.

Wellness Lifestyle Real Estate Pipeline in 2017:

Over **740** projects across **34** countries



Note: Estimates as of November 2017. Source: Global Wellness Institute.

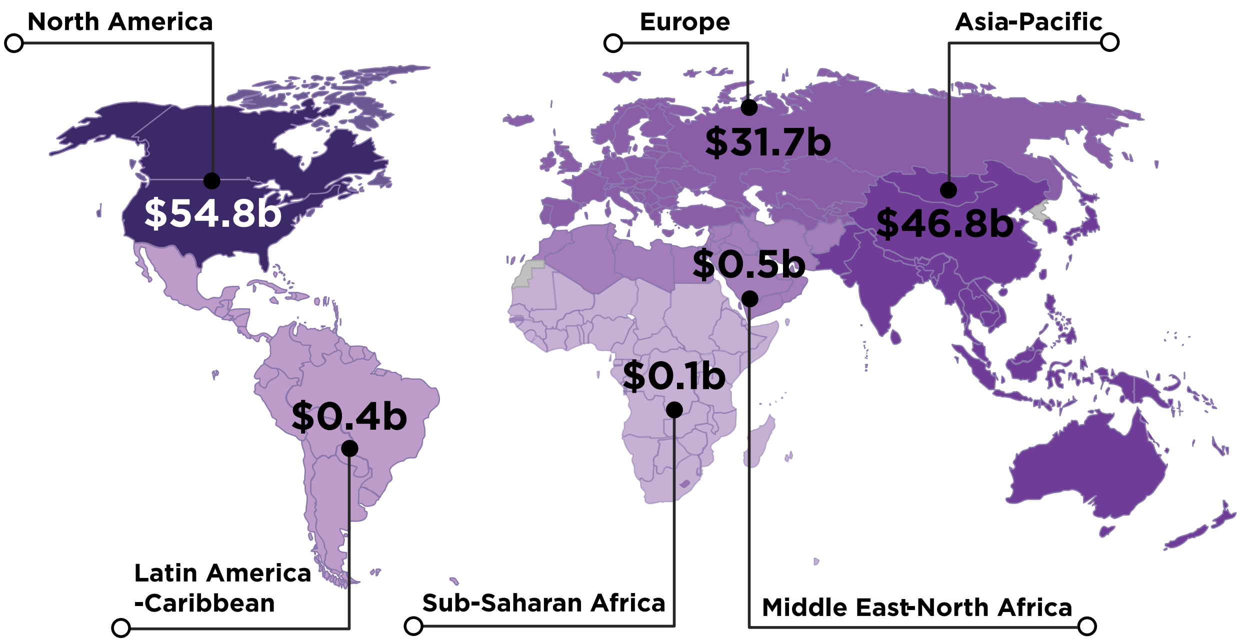
[6] U.S. Green Building Council (2015). *The Business Case for Green Building.* https://www.usgbc.org/articles/business-case-green-building.

[7] Because it is impossible to separate out the residential and non-residential components in commercial/institutional projects (e.g., mixed-use, hospitality, etc.), GWI estimates *wellness real estate* in aggregate, although the focus in this report is on the residential component or *wellness lifestyle real estate*.

Around the world, there is rising consumer interest in extending our wellness experiences from our vacation destinations and leisure activities to our homes and everyday lives. For most of us, our home represents our most important personal investment and one of our largest expenditures (about 20% of all consumer spending, or more than $9 trillion in 2017[8]), so it is only logical that our home should also be an investment in our health and wellbeing. Based on strong demand, GWI estimates that wellness lifestyle real estate and community projects positioned at the middle and upper ends of the market are currently achieving price premiums of 10-25%. The United States, along with a few key countries in Asia (China, Australia, India) and Europe (UK, Germany), account for three-quarters of the global wellness real estate market.

Wellness Real Estate Market by Region, 2017

Size of wellness real estate market



Source: Global Wellness Institute

[8] Global Wellness Institute analysis of global consumer expenditures data from Euromonitor International.

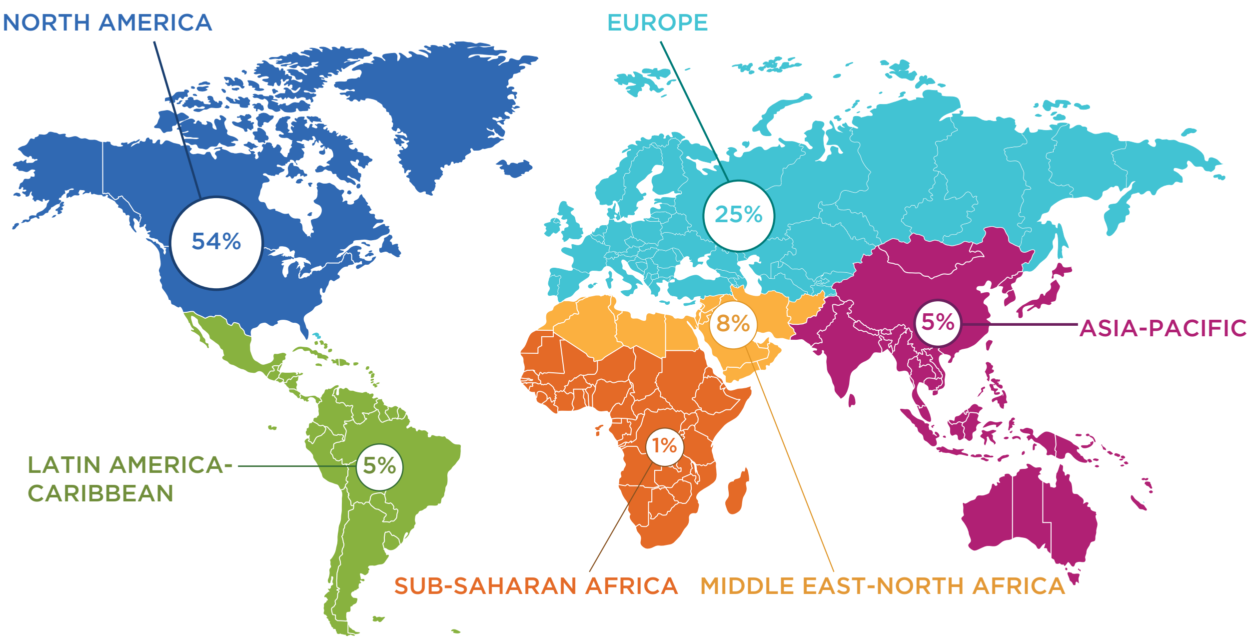
Valued at $48 billion, the workplace wellness market is small in comparison to the massive economic burden and productivity losses associated with an unwell workforce and widespread worker disengagement.

GWI measures the size of the global workplace wellness industry by estimating the ***expenditures made by employers to improve employee wellness.*** These include a wide variety of services, products, and platforms, such as health screening assessments, diagnostic tests, incentive programs, wearable devices, counseling services, etc., and they serve a wide range of needs, from exercise, healthy eating, and sleep, to chronic illness, obesity, addiction, depression, and stress. GWI estimates that this market grew by 4.8% annually over the past two years to reach $47.5 billion in 2017 (as compared to $43.3 billion in 2015).

However, this market is very small when compared to the economic burden of an unwell workforce – a cost estimated by GWI at 10-15% of global economic output (factoring in the medical costs and productivity losses caused by chronic diseases, work-related stress, injuries and illnesses, and disengagement).[9] Globally, less than 10% of the workforce benefits from workplace wellness initiatives, primarily those who live in the world's wealthiest economies or work for large or multinational companies. The majority of workers around the world are more concerned with meeting basic needs, such as earning a living wage, job stability, workplace safety, and access to basic healthcare.

Access to Workplace Wellness in 2017

Only **10%** of the world's workers have access to workplace wellness programs & services



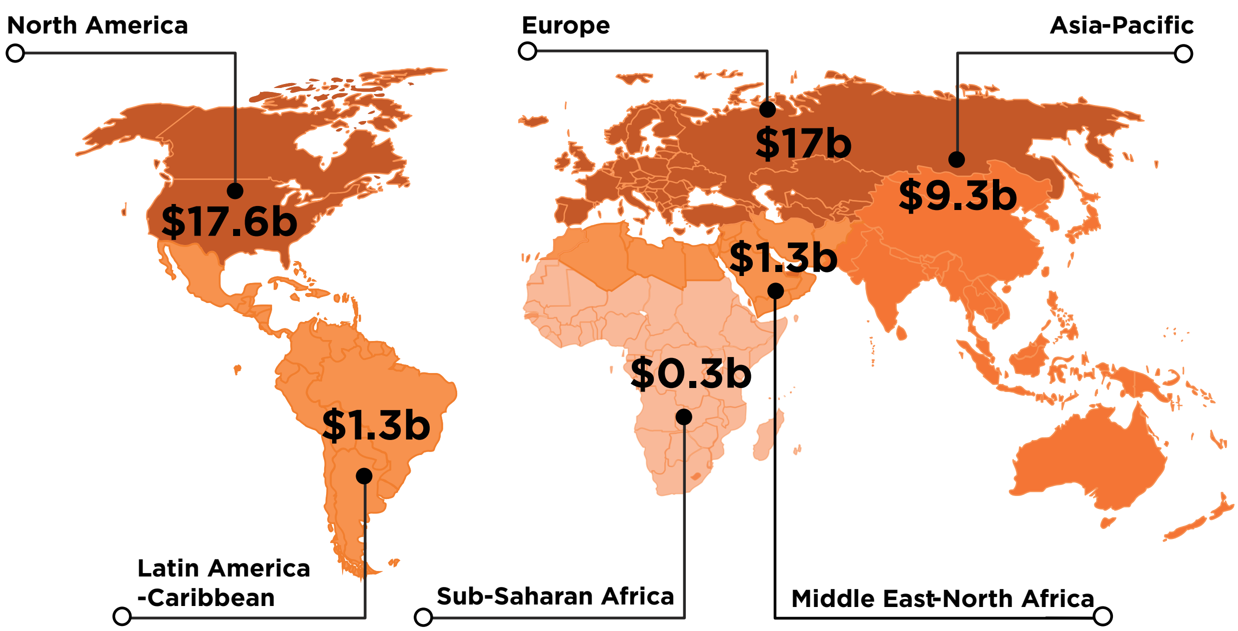
Percent of employed workers in each region who have access to workplace wellness programs/services.

Source: Estimates by the Global Wellness Institute, based upon data from the International Labour Organization, World Bank, and Conduent/Buck Consultants.

Overall, the global market for workplace wellness is concentrated in the high-income countries in North America, Western Europe, and Asia. Together, the top twenty markets in workplace wellness account for nearly 84% of global spending. Much of this spending is motivated by employers' desire to lower healthcare costs; improve morale, retention, and recruitment; and increase productivity and competitiveness. The United States remains by far the world's largest market for workplace wellness expenditures, estimated at more than $15 billion in 2017. Since the healthcare burden is mostly borne by employers in the United States, U.S. companies have the strongest incentives to control escalating medical costs while also improving productivity.

Workplace Wellness Market by Region, 2017

Employer expenditures on workplace wellness programs/services



Source: Global Wellness Institute.

[9] Global Wellness Institute (2016). *The Future of Wellness at Work.*

At $639 billion, wellness tourism is a significant and fast-growing segment of global tourism.

In the 2013 *Wellness Tourism Economy* inaugural study, GWI defined wellness tourism as ***travel associated with the pursuit of maintaining or enhancing one's personal wellbeing*** and measured its global size for the first time. Fast-forward five years, wellness tourism is now recognized as a significant and fast-growing tourism segment. Globally, wellness tourism has expanded from $563.2 billion in 2015 to $639.4 billion in 2017. The sector's 6.5% annual growth rate from 2015-2017 is more than double the 3.2% growth rate for general tourism. Travelers made 830 million wellness trips in 2017, which is 139 million more than in 2015.

Wellness tourism creates opportunities for wellness businesses and other businesses. The expenditures of wellness travelers benefit all travel industry segments (see figure below). While some expenditures are made on wellness-focused activities (such as visiting a hot spring, getting a massage, or taking a meditation or fitness class), others are "generic" travel expenditures (such as transportation, food and lodging, shopping, etc.). As more consumers incorporate wellness into their lifestyles, there are many opportunities for all businesses to infuse wellness into their offerings and capture spending by wellness travelers.

Wellness Tourism Industry in 2017

Data combine both inbound/international and domestic wellness tourism spending, and also include both primary and secondary wellness trips.

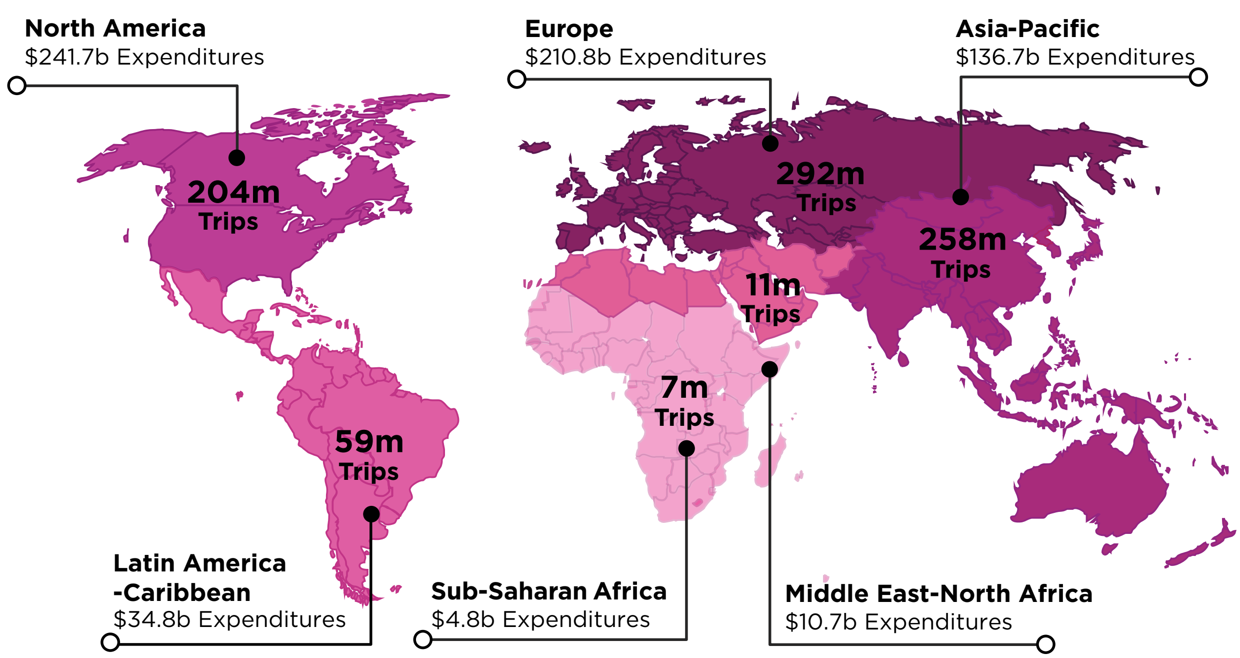
Source: Estimates by the Global Wellness Institute, based on tourism industry data from Euromonitor International.

The wellness tourism market includes two types of travelers: those who are motivated by wellness to take the trip or choose the destination ***(primary wellness travelers)*** and those who seek to maintain wellness or engage in wellness activities during travel ***(secondary wellness travelers)***. The bulk of wellness travel is done by secondary wellness travelers, who account for 89% of wellness tourism trips and 86% of expenditures in 2017. Wellness tourism is also high-yield tourism. GWI estimates that international wellness travelers spend at a 53% premium (over the average international tourist), while domestic wellness travelers spend at a 178% premium (over the average domestic tourist).

The rapid growth of wellness tourism around the world has been stimulated by a rising global middle class, increasing consumer desire to adopt a wellness lifestyle, and a growing interest in experiential travel. Across the world, Europe remains the destination for the largest number of wellness trips. North America continues to lead in wellness tourism expenditures because average spending per trip is higher. In the past five years, Asia has made the most gains in the number of wellness trips and wellness tourism expenditures, with demand stimulated by strong economies and an expanding middle class.

Wellness Tourism by Region, 2017

Number of wellness tourism trips and expenditures
(inbound and domestic)



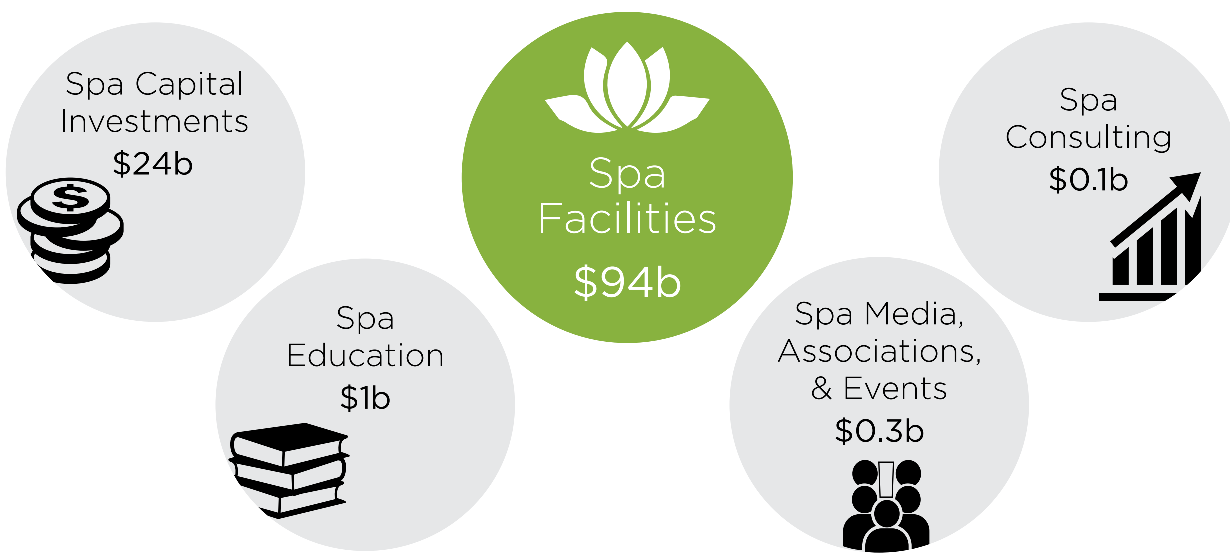
Source: Global Wellness Institute.

The $119 billion spa economy has grown in number of facilities, revenues, and employment, driven by strong economic growth and rising consumer interest in wellness.

Ten years ago, GWI unveiled The Global Spa Economy 2007 study, where we defined spas as ***establishments that promote wellness through the provision of therapeutic and other professional services aimed at renewing the body, mind, and spirit.*** In 2017, GWI estimates that the number of spas has grown to over 149,000, earning $93.6 billion in revenues and employing nearly 2.6 million workers. This represents 9.9% annual revenue growth, which is much higher than the pace observed in the previous two-year period. The main drivers of the spa industry are rising incomes, rapid growth of wellness tourism, and an increasing consumer propensity to spend on all things related to wellness.

The broader spa economy encompasses not only spa facility revenues, but also sectors that support and enable spa businesses, including capital investment; consulting; training of spa therapists and education of managers; and associations, media, and events businesses that promote spas. In 2017, these related sectors added $25.2 billion to the spa facility revenues of $93.6 billion, to create a $118.8 billion global spa economy.

Spa Economy: $119 billion in 2017

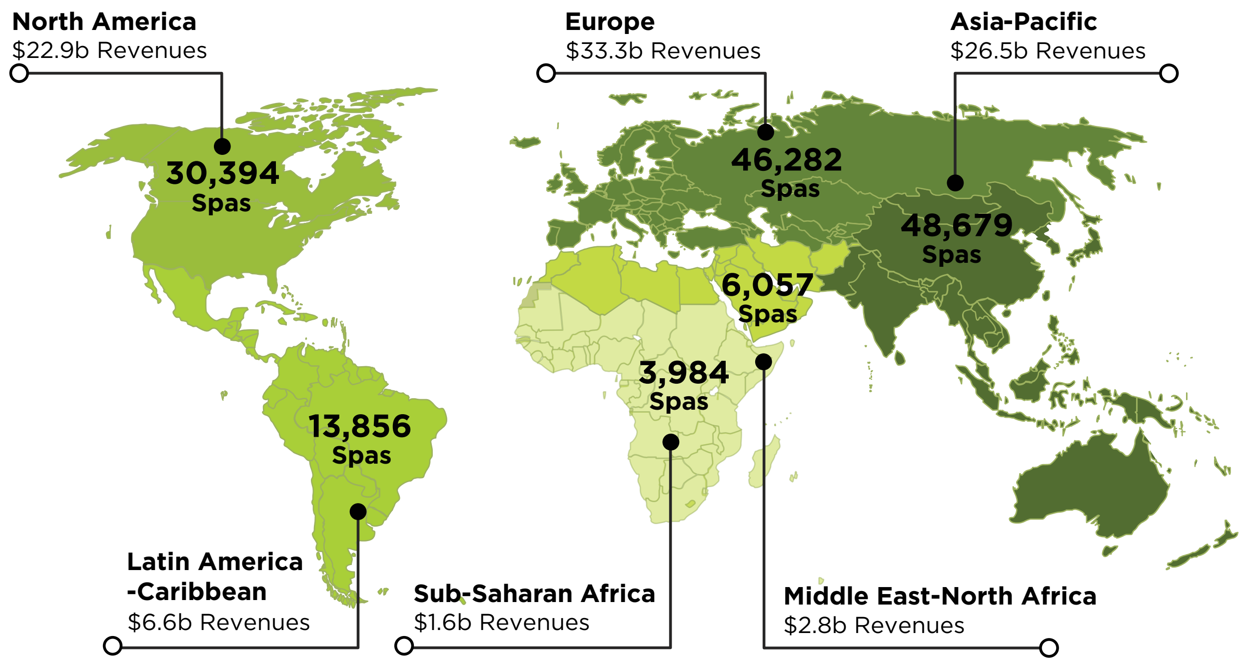


Note: Figures may not sum to total due to rounding.
Source: Global Wellness Institute

Asia-Pacific is home to the largest number of spas and also added the greatest number of new spas from 2015-2017. Europe led in total spa revenues in 2017. Across the world, the spa industry remains quite concentrated in the top markets. The top five countries (United States, China, Germany, Japan, and France) account for 48% of global revenues, while the top twenty countries represent 77% of the global market. However, the industry is becoming slightly more dispersed over time. In 2017, 18 countries had annual spa revenues exceeding $1 billion, and Indonesia and Australia each surpassed the $1b threshold for the first time.

Spa Facilities by Region, 2017

Number of spas and spa facility revenues



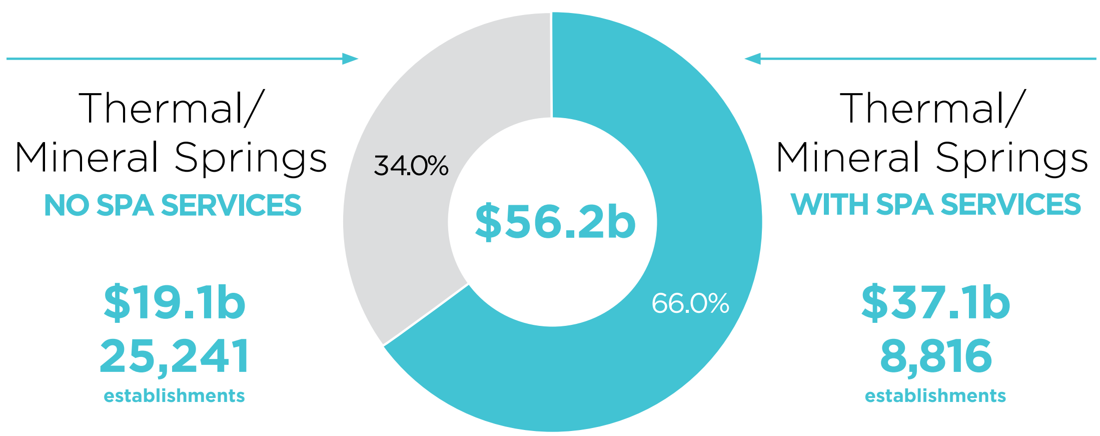
Source: Global Wellness Institute.

The $56 billion thermal/mineral springs industry has continued its strong growth as consumers turn to water for relaxation, community, and healing.

GWI defines the thermal/mineral springs industry as encompassing ***revenue-earning business establishments associated with the wellness, recreational, and therapeutic uses of waters with special properties.*** Consistent with that definition and previous methodologies, we estimate that there are 34,057 thermal/mineral springs establishments operating in 127 countries. These businesses earned $56.2 billion in revenues in 2017, and they employed an estimated 1.8 million workers.

The majority of thermal/mineral establishments around the world are rustic and traditional bathing and swimming facilities. They target their local markets and charge relatively low admission fees. About a quarter of the establishments are higher-end, targeting tourists and offering value-added spa services. Those that offer spa services account for a much greater share of industry revenues (66%), and also experienced higher revenue growth (7.4% average annual growth versus 0.5% for those without spa services, over 2015-2017).

Thermal/Mineral Springs Industry in 2017



Note: The thermal/mineral springs revenue estimates include all revenues earned by these establishments, from bathing/swimming offerings, spa/wellness services and other treatments, other recreational activities, food & beverage, lodging, and other services. See Appendix A for additional definitions and descriptions of categories.

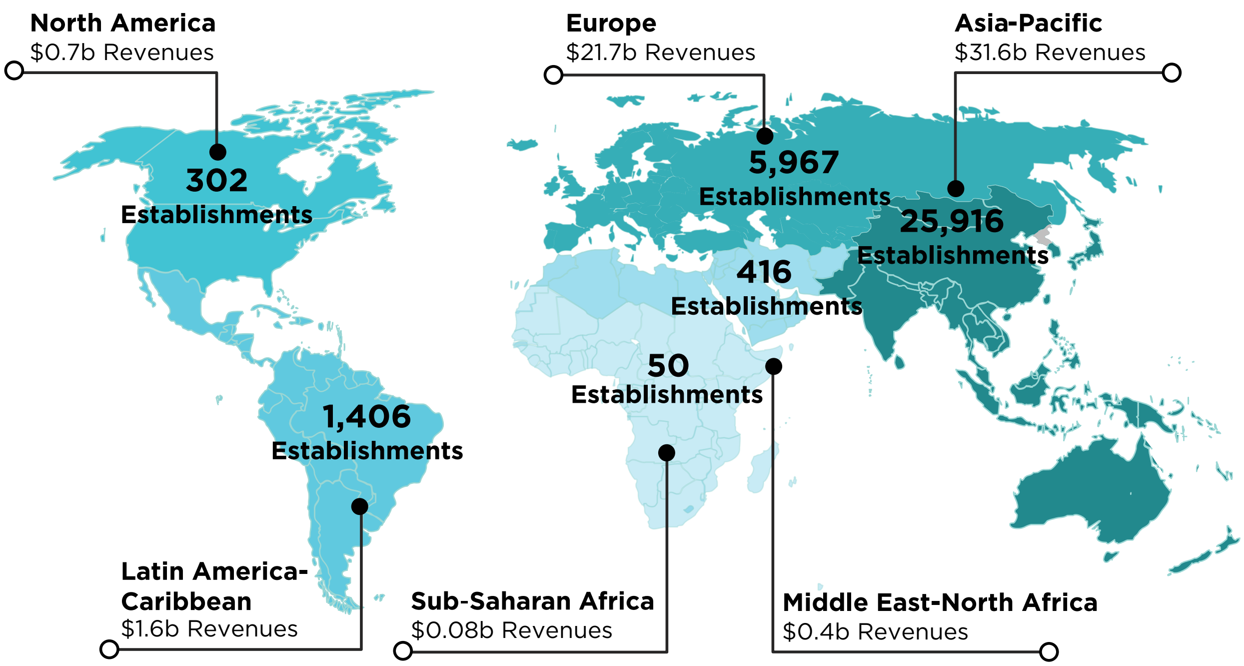
Source: Global Wellness Institute

The thermal/mineral springs industry is heavily concentrated in Asia-Pacific and Europe, reflecting the centuries-old history of water-based healing and relaxation in these two regions. Together, Asia-Pacific and Europe account for 95% of industry revenues and 94% of establishments.

Thermal/mineral springs bathing experiences appeal to a growing segment of consumers who are seeking to connect with nature, experience cultural traditions, and pursue alternative modalities for healing, rehabilitation, and prevention. Responding to these trends, both private investors and governments across many countries are investing in the sector. In countries with long-established thermal bathing traditions, governments are increasingly promoting these as a key wellness tourism offering. They are investing in renovation and reopening of primitive, outdated, and closed-down facilities, as well as upgrading service standards and training to meet the expectations of international tourists.

Thermal/Mineral Springs by Region, 2017

Number of thermal/mineral springs establishments and revenues



Source: Global Wellness Institute.

GWI predicts that the wellness economy will continue to grow at a healthy pace over the next five years and will expand its share of the global economy.

Within a relatively short span of time, wellness as a holistic concept has become more broadly understood and adopted all around the world. And there is no sign that this movement is slowing down. For the next five years, GWI projects robust growth in the five wellness sectors we track in detail (see table below), based on our own data sources and estimation models. We also believe the three sectors that represent the three core spheres of life will have the strongest growth – *wellness real estate*, *workplace wellness*, and *wellness tourism* – while the other wellness sectors will continue to grow as they support the integration of a wellness lifestyle into all aspects of our daily lives.

Wellness Sector Growth Projections, 2017-2022

	Projected Market Size (US$ billions)		Projected Average Annual Growth Rate
	2017	2022	2017-2022
Wellness Real Estate	$134.3	$197.4	8.0%
Workplace Wellness	$47.5	$65.6	6.7%
Wellness Tourism	$639.4	$919.4	7.5%
Spa Facilities	$93.6	$127.6	6.4%
Thermal/Mineral Springs	$56.2	$77.1	6.5%

Source: Global Wellness Institute estimates, based upon economic and industry sector projections from the IMF, ILO, Euromonitor, and GWI's data and projection model

However, an industry that focuses primarily on the wealthiest customers is addressing a limited market and may face a backlash.

As the wellness economy grows, there is simultaneously a growing perception that most of the latest products, services, technologies, and innovations are catering to the wealthiest consumers. For the wealthy, there are now a plethora of options – superfoods, boutique studios, wellness resorts, alternative healing modalities, DNA testing, sleep aids, micro-procedures, injectable/edible substances, gadgets, and more – to aid in their quest to feel good and be "forever young," or better yet, immortal. Meanwhile, income inequality is rising across the world, and poor people are growing sicker and more depressed, and are dying younger than those who are more well off.

So, it is not surprising that global conversations about wellness mirror this bifurcation of wealth and wellbeing. On one end, there is an intense race to promote the latest, most exclusive, and sophisticated offerings to the wealthy, such as housing, vacations, technologies, experiences, lifestyles, and even life transformations. On the other end, there is a media ready to ridicule and vilify the latest wellness businesses, modalities, and innovations as yet another sign that the privileged "one-percenters" are narcissistic and out of touch with the rest of humanity. In a free market, it is a business's prerogative to pursue whichever consumer markets and segments they consider promising and profitable. Collectively, however, the wellness market will not be healthy and sustainable if this polarization continues or worsens, possibly leading to a stagnant or shrinking customer base.

Focusing on the "we" of wellness can be a winning value proposition for customers, employees, investors, and other stakeholders.

One consistent finding from our ten years of wellness economy research – from wellness tourism and workplace wellness to wellness communities and lifestyle real estate – is the evolution of wellness from a personal aspiration to an emerging value system that recognizes our connection to the collective. Our individual health and wellbeing are inextricably linked to the wellbeing of other people, our communities, and the planet. We cannot be truly well if we confine our existence to a personal wellness bubble. For wellness economy businesses, this means more than philanthropy or corporate social responsibility. In the marketplace, customers increasingly make decisions based on emotions and their value systems: Does the brand story resonate with what I care about? What are the environmental and social consequences of my purchase? A company whose true compass is wellbeing for all delivers a much more powerful emotional story that will appeal to this growing segment of consumers.

At the same time, widespread disengagement has left a vast majority of the global workforce feeling disaffected, unmotivated, and unhappy at work – threatening business competitiveness and success. Research has shown that our discretionary efforts are tied to our intrinsic motivations, which, in turn, are driven by a sense of purpose, autonomy, personal growth, and teamwork. This is reinforced by findings from an expanding field of happiness research: We are much more likely to feel happy and fulfilled when we give, help others, contribute to something larger than ourselves, and feel that the world is fair. Companies whose mission is to bring wellness to the people who need it the most – rather than targeting the privileged few – will offer a more compelling case for their teams to infuse their daily work with meaning and purpose. Ultimately, it is the creativity, passion, energy, and commitment of motivated people that will deliver for customers, business owners, and investors.

Global Wellness Economy Highlights (2017)

Wellness Real Estate

Wellness Real Estate Market:
$134.3 billion (6.4% CAGR from 2015-2017)

Wellness Lifestyle Real Estate (Residential) Project Pipeline:
over 740 projects in 34 countries

Workplace Wellness

Number of Workers with Access to Workplace Wellness Programs & Services:
321.7 million (9.8% of employed workers)

Expenditures on Workplace Wellness:
$47.5 billion (4.8% CAGR from 2015-2017)

Wellness Tourism

Number of Wellness Trips:
830.0 million (9.6% CAGR from 2015-2017)

Wellness Tourism Expenditures:
$639.4 billion (6.5% CAGR from 2015-2017)

Average Expenditure per Trip:
$1,528 for intl./inbound (53% premium);
$609 for domestic (178% premium)

Spas

Number of Spas:
149,252 (10.8% CAGR from 2015-2017)

Spa Revenues:
$93.6 billion (9.9% CAGR from 2015-2017)

Spa Employment:
2,594,507 (9.8% CAGR from 2015-2017)

Thermal/Mineral Springs

Number of Thermal/Mineral Springs Establishments:
34,057 (11.3% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Revenues:
$56.2 billion (4.9% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Employment:
1,772,775 (13.1% CAGR from 2015-2017)

Global Wellness Economy Monitor

Full Report

OCTOBER 2018

GLOBAL WELLNESS INSTITUTE™
EMPOWERING WELLNESS WORLDWIDE

I. THE GLOBAL WELLNESS ECONOMY

Valued at $4.2 trillion in 2017, the wellness economy continues to expand faster than global economic growth.

Wellness is a word that was not used or heard often just ten years ago. Yet, in a short span of time, it has become embedded in the mainstream consumer lifestyle and ubiquitous in media and retail. Wellness is now a differentiator or selling point for all kinds of products, services, and technologies – from food supplements to vacations, from furniture to DNA testing, from gym memberships to hotel rooms. However, despite the popularity of wellness branding, there are important questions. Is wellness the answer to unsustainably rising healthcare costs? Would higher consumer spending on wellness reduce or displace some of the spending on medical/sick care? Clearly, the potential of, and the opportunities offered by, the wellness economy are of great interest to consumers, entrepreneurs, investors, and policymakers.

GLOBAL WELLNESS ECONOMY:
$4.2 trillion in 2017

Note: Numbers do not add due to overlap in segments. Dark colored bubbles are the sectors for which GWI conducts in-depth, country-level primary research. Light colored bubbles are sectors for which GWI aggregates global estimates only, drawing from secondary sources. Source: Global Wellness Institute.

The Global Wellness Institute (GWI) defines wellness as ***the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health.*** Wellness is multi-dimensional and preventive; it relies on individual responsibility to integrate a holistic health paradigm into everyday life – how we live, eat, work, play, travel, maintain vitality, deal with stress, and respond to the first signs of illness.

In 2014, GWI published the first *Global Spa & Wellness Economy Monitor,* measuring the size of the global wellness economy for the first time. ***The wellness economy encompasses industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives.*** GWI includes ten sectors in the wellness economy[10], and we develop original estimates for five of these sectors, including *Spa, Wellness Tourism, Thermal/Mineral Springs, Workplace Wellness,* and *Wellness Real Estate.* For the other five sectors (see table below), we aggregate secondary global industry data from multiple sources to arrive at the estimated market size. This study provides an update for all wellness economy sectors, using methodologies that are consistent with GWI's previous studies.

GWI estimates that the wellness economy has grown from $3.7 trillion in 2015 to $4.2 trillion in 2017, representing 5.3% of global economic output. By comparison, global health expenditures were estimated at $7.3 trillion in 2015 (the most recent year for which data are available).[11] From 2015-2017, the wellness economy grew by 6.4% annually, a growth rate nearly twice as fast as global economic growth (3.6% annually).[12] The wellness sectors that have experienced the fastest growth rates are *Spa, Wellness Tourism,* and *Wellness Real Estate.*

[10] See *Appendix A* for definitions of the ten wellness economy sectors.

[11] Global health expenditures data from: WHO, *Global Health Expenditures Database,* http://apps.who.int/nha/database/Home/Index/en. 2015 is the most recent year available.

[12] Global GDP data from: IMF, *World Economic Outlook Database,* April 2018 Edition, https://www.imf.org/external/pubs/ft/weo/2018/01/weodata/index.aspx.

Wellness Economy Sectors, 2015 and 2017

	Market Size (US$ billions)		Average Annual Growth Rate
	2015	2017	2015-2017
Personal Care, Beauty, & Anti-Aging	$999.0	$1,082.9	4.1%
Healthy Eating, Nutrition, & Weight Loss	$647.8	$702.1	4.1%
Wellness Tourism	$563.2	$639.4	6.5%
Fitness & Mind-Body	$542.0	$595.4	4.8%
Preventive & Personalized Medicine and Public Health	$534.3	$574.8	3.7%
Traditional & Complementary Medicine**	**$199.0	**$359.7	**
Wellness Real Estate***	$118.6	$134.3	6.4%
Spa Economy *(Spa Facilities)*	$98.6 *($77.6)*	$118.8 *($93.6)*	****9.8% ****(9.9%)
Thermal/Mineral Springs	$51.0	$56.2	4.9%
Workplace Wellness	$43.3	$47.5	4.8%
Wellness Economy	***$3,724.4**	***$4,220.2**	**6.4%**

** Figures do not sum to total due to overlap in segments.*

*** The definition and measurement of this sector has changed from 2015 to 2017, and so the two numbers should not be directly compared as a time series. In 2017 we have incorporated an expanded measurement of traditional medicine into this sector (e.g., Traditional Chinese Medicine, Ayurveda, etc.) due to improved global data availability on those segments. 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.*

**** The name for this sector has changed from 2015 to 2017, based on the methodology elaborated in GWI's recent "Build Well to Live Well" report. It is now labelled "wellness real estate" to emphasize that the measurement includes residential AND commercial/institutional building, as opposed to "wellness lifestyle real estate" (which focuses on the residential component).*

***** The high growth rate for spa revenues is not entirely due to new builds, but also due to a dramatic increase in the number of hotels/resorts listing themselves and their spa facilities/services on global online booking sites, especially in emerging market countries.*

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

The environments in which we live, work, and travel are critical yet largely underappreciated determinants of our wellness.

Our health is a result of complex interactions among genetic factors and numerous interrelated external determinants (e.g., socio-economic factors, our physical environment, access to healthcare). These external factors form a complex "wellness ecosystem"[13] that can augment or reduce the impacts of our genes; for example, someone with a genetic predisposition for breast cancer can increase that risk through exposure to endocrine disrupting compounds, unhealthy eating, and a sedentary lifestyle. Those who are young, elderly, disabled, or poor are particularly vulnerable to these external factors.[14]

What may be surprising from recent research findings is that genetics may account for as little as 10-15% of our health outcomes, while external and environmental factors play a much more important role. For example, research shows that the *exposome* (the environments in which our genes live) may account for 70-90% of our disease risks,[15] while external and environmental factors may cause 70-90% of cancers.16 In the United States, research studies show that the neighborhood or county where we live can predict our life expectancy as well as how we will die,[17] and these differences persist even after adjusting for socioeconomic and demographic factors.[18] Healthy behaviors and lifestyles have a profound impact on our health; yet, our habits are very difficult to change. Fortunately, psychology shows that changing our living environments can greatly impact our behaviors – establishing the "default" choices in our daily activities and routines, and nudging us to behave in one way or another.[19]

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[13] Over the last 10-15 years, researchers and public health officials have increasingly emphasized an *ecological model of health* that captures the complex linkages and relationships among many external factors to determine our health and wellbeing. See: Institute of Medicine (2006). *Genes, Behavior, and the Social Environment: Moving Beyond the Nature/Nurture Debate.* Washington, DC: The National Academies Press.

[14] Robert Wood Johnson Foundation (2011). *Issue Brief #8: Neighborhoods and Health.* http://www.rwjf.org/en/library/research/2011/05/neighborhoods-and-health-.html.

[15] Rappaport, S.M. and Smith, M.T. (2010). Environment and Disease Risks. *Science*, 330(6003), 460–461. See also: U.S. Centers for Disease Control, *Exposome and Exposomics,* https://www.cdc.gov/niosh/topics/exposome/default.html.

[16] Wu, S., et al (2016). Substantial contribution of extrinsic risk factors to cancer development. *Nature*, 529(7584), 43-47.

[17] Gounder, C. (2016, December 14). How long will you live? That depends on your zip code. *The Guardian.* https://www.theguardian.com/commentisfree/2016/dec/14/life-expectancy-depends-on-zip-code-inequality.

[18] Institute of Medicine and National Research Council (2013). *U.S. Health in International Perspective: Shorter Lives, Poorer Health.* Washington, DC: The National Academies Press.

[19] See, for example: 1) Kelly, M. and Barker, M. (2016). Why is changing health-related behavior so difficult? *Public Health,* 136, 109-116. 2) Stulburg, B. (2014). The Key to Changing Individual Health Behaviors: Change the Environments That Give Rise to Them. *Harvard Public Health Review,* vol. 2. 3) Kahan, S., et al (2014). *Health Behavior Change in Populations.* Baltimore, MD: Johns Hopkins University Press.

There is ample and growing evidence that our health and longevity are greatly affected by the physical environments in which we live, work, and travel, and yet these environments continue to receive scant attention from the medical community. At least $260 billion is spent globally on biomedical R&D every year.[20] In spite of major advances in genetics, drugs, medical technologies, and disease treatments, very few research dollars have been directed toward addressing the external/environmental factors that affect our health behaviors, risks, and outcomes.[21] Likewise, only 4% of annual global health expenditures are spent on public health, risk reduction, and prevention.[22] This lopsided investment calculus needs to change. To combat the growing epidemic and escalating costs of chronic disease, we must address the many aspects of our living and working environments that drive our individual and collective health and wellbeing.

Wellness sectors are no longer siloed industries. They will increasingly converge as we integrate wellness into our homes and communities, our work, and our travel.

While each of the ten wellness sectors is sizable and important in its own right, they are also dynamic and interconnected, and they are intrinsically linked to the wellness economy as a whole. Once upon a time, our contact with wellness might have been episodic – when we went to the gym, got a massage, or traveled to a destination spa. That is no longer the case. In the face of longer lifespans, rising chronic disease, stress, and unhappiness, wellness is becoming essential. We are reexamining our lives and refocusing our attention on what makes us well – particularly the places and manner in which we live, work, and travel. As a result, consumers are increasingly seeking opportunities to integrate wellness into all aspects of their daily lives.

The wellness economy mirrors those shifting priorities, alongside a growing recognition of the critical impact of external environments on our health and wellbeing. Among the ten wellness economy sectors, three of them represent those critical, interrelated environments in which we live our lives – *wellness lifestyle real estate and communities* (live), *workplace wellness* (work), and wellness tourism (travel). The other seven wellness sectors do not operate independently from, or outside of, these core spheres. They are all essential components of a **"wellness ecosystem"** that nurtures a lifestyle of wellbeing and longevity, because we consume wellness goods and services in the homes and communities where we live, where we work, or when we travel.

The world's greatest innovations have typically occurred at the intersections of disparate disciplines, industries, and cultures[23] – and wellness is no exception. There are immense opportunities for innovation as diverse wellness sectors find new opportunities to deliver their offerings into the three core spheres of our daily lives. In the past few years, there has been rapid acceleration of

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[20] Chakma, J., et al (2014). Asia's Ascent — Global Trends in Biomedical R&D Expenditures. *New England Journal of Medicine,* 370(1), 3-6.

[21] Institute of Medicine (2000). *Promoting Health: Intervention Strategies from Social and Behavioral Research.* Washington, DC: The National Academies Press.

[22] GWI analysis of global health expenditures data from: WHO, *Global Health Expenditures Database*.

[23] See, for example: Johansson, F. (2004). *The Medici Effect: Breakthrough Insights at the Intersection of Ideas, Concepts, and Cultures.* Boston, MA: Harvard Business School Press.

acquisitions, partnerships, horizontal/cross-category expansions, and emergence of new business models across all of the wellness economy sectors. Examples include:

- Hyatt Hotel's acquisition of Miraval and Exhale (wellness tourism, spa, and fitness).
- Equinox and other fitness companies opening branded hotels (fitness and wellness tourism).
- Introduction of healthy food options by many hotel brands (healthy eating and wellness tourism).
- China infusing Traditional Chinese Medicine into hot spring resort developments (traditional and complementary medicine, thermal/mineral springs, and wellness tourism).
- Residential development around hot springs and spa at Glen Ivy/Goco Retreat Temescal Valley in California (thermal/mineral springs, spa, wellness tourism, and wellness lifestyle real estate).
- Connected City in greater Tampa, Florida – a smart gigabit/Ultrafi community with integrated telemedicine (preventive/personalized medicine and public health, wellness lifestyle real estate, and wellness tourism).
- Destination Medical City, a Mayo Clinic-led urban renewal initiative to bring wellness to employees and adjacent communities, and to create a healthy destination for patients (wellness lifestyle real estate/communities, workplace wellness, preventive/personalized medicine and public health).
- The integrated co-living, co-working, and fitness/wellness concepts being launched by We Work/We Live/Rise by We and LifeTime Fitness/Living/Work in the United States (wellness lifestyle real estate, workplace wellness, and fitness).
- The rise of minimally-invasive treatments (acupuncture, botox and fillers, etc.) in cruise ship spas (beauty, wellness tourism, spa).

Going forward, we expect to see more and more cross-sector convergence, innovation, and integrated concepts appearing in the wellness economy.

GWI predicts that the wellness economy will grow at a healthy pace in the next five years and will expand its share of the global economy.

Since GWI began tracking the wellness economy sectors ten years ago, we have observed accelerating consumer spending on wellness and rapid adoption of all kinds of wellness-related behaviors and lifestyles. For many people, wellness no longer means just scheduling activities like a massage appointment or gym visit into their day. Instead, a wellness-mindset is starting to permeate the global consumer consciousness, affecting people's daily routines and decision-making, such as: food purchases and the way food is cooked and eaten; mitigating stress and mental wellness; incorporating movement into daily activities; environmental consciousness; the yearning for connection; the desire for self-actualization; and a search for happiness. Within a short span of time, wellness as a holistic concept is now more broadly understood and adopted all around the world. And there is no sign that this movement is slowing down.

For the next five years, GWI projects robust growth in the five wellness sectors we track, based on our own data sources and estimation models. The upward momentum for the wellness economy is strong, as the underlying trends that propel it remain as compelling as ever, including: rising global prosperity, population aging, the rise of chronic disease, and consumer awareness and lifestyle changes. We believe the three sectors that represent our three core spheres of life will have the strongest growth – *wellness real estate, workplace wellness,* and *wellness tourism* – while the other wellness sectors will continue to grow as they support our integration of a wellness lifestyle into all aspects of our daily lives.

Wellness Sector Growth Projections, 2017-2022

	Projected Market Size (US$ billions)		Projected Average Annual Growth Rate
	2017	2022	2017-2022
Wellness Real Estate	$134.3	$197.4	8.0%
Workplace Wellness	$47.5	$65.6	6.7%
Wellness Tourism	$639.4	$919.4	7.5%
Spa Facilities	$93.6	$127.6	6.4%
Thermal/Mineral Springs	$56.2	$77.1	6.5%

Source: Global Wellness Institute estimates, based upon economic and industry sector projections from the IMF, ILO, Euromonitor, and GWI's data and projection model

However, an industry that focuses primarily on the wealthiest customers is addressing a limited market and may face a backlash.

As the wellness economy grows, there is simultaneously a growing perception that most of the latest products, services, technologies, and innovations are catering to the wealthiest consumers. In consumer media, it is hard to miss the promotion of $1,000 hotel rooms, $600 facials, $300 athleisure leggings, $15 cold-pressed juices, and multi-million dollar properties laden with wellness features and amenities. For those with the financial resources, there are now a plethora of options – superfoods, boutique studios, wellness resorts, alternative healing modalities, DNA testing, sleep aids, micro-procedures, injectable/edible substances, gadgets, and more – to aid in their quest to feel good and be "forever young," or better yet, immortal.

Meanwhile, rising income inequality is an alarming trend across the world. Without more equitable access to basic healthcare, safe homes, stable incomes, and social safety nets, poor people are growing sicker and more depressed, and are dying younger than those who are more well off. In the United States, mortality rates have been rising for middle-aged, working class whites over the past two decades, despite rising life expectancy among the overall population.[24] So, it is not surprising that global conversations about wellness mirror this bifurcation of wealth and wellbeing. On one end, there is an intense race to promote the latest, most exclusive, and sophisticated offerings to the wealthy – housing, vacations, technologies, experiences, lifestyles, and even life transformations. On the other end, there is a media ready to ridicule and vilify the latest wellness business, modalities, and innovations as yet another sign that the privileged "one-percenters" are narcissistic and out of touch with the rest of humanity. In a free market, it is a business's prerogative to pursue whichever consumer markets and segments they consider promising and profitable. Collectively, however, the wellness market will not be healthy and sustainable if this polarization continues or worsens, possibly leading to a stagnant or shrinking customer base.

Focusing on the "we" of wellness can be a winning value proposition for customers, employees, investors, and other stakeholders.

One consistent finding from GWI's ten years of wellness economy research – from wellness tourism and workplace wellness to wellness lifestyle real estate and communities – is the evolution of wellness from a personal aspiration to an emerging value system that recognizes our connection to the collective. Our individual health and wellbeing are inextricably linked to the wellbeing of other people, our communities, and the planet. We cannot be truly well if we confine our existence to a personal wellness bubble. For wellness economy businesses, this means more than philanthropy or corporate social responsibility. In the marketplace, customers increasingly make decisions based on emotions and their value systems: Does the brand story resonate with what I care about? What are the environmental and social consequences of my purchase? A company

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[24] Case, A., and Deaton, A. (2015, December 8). Rising Morbidity and Mortality in Midlife among White Non-Hispanic Americans in the 21st Century. *PNAS*, 112 (49), 15078-15083. http://www.pnas.org/content/112/49/15078.

whose true compass is wellbeing for all delivers a much more powerful emotional story that will appeal to this growing segment of consumers.

At the same time, widespread disengagement has left a vast majority of the global workforce feeling disaffected, unmotivated, and unhappy at work – threatening business competitiveness and success. Research has shown that our discretionary efforts are tied to our intrinsic motivations, which, in turn, are driven by a sense of purpose, autonomy, personal growth, and teamwork. This is reinforced by findings from an expanding field of happiness research: We are much more likely to feel happy and fulfilled when we give, help others, contribute to something larger than ourselves, and feel that the world is fair. Companies whose mission is to bring wellness to the people who need it the most – rather than targeting the privileged few – will offer a more compelling case for their teams to infuse their daily work with meaning and purpose. Ultimately, it is the creativity, passion, energy, and commitment of motivated people that will deliver for customers, business owners, and investors.

Research Scope and Methodology

The global wellness economy and industry data presented in this report are for the year 2017. The definitions, conceptual framework, and estimation models for the various 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 decade. The authors have developed original, country-level data estimates for five wellness economy sectors: spa, wellness tourism, thermal/mineral springs, workplace wellness, and wellness real estate, based on GWI's proprietary models and databases. Global figures for the other five wellness sectors are aggregated from secondary sources.

The analysis is based on extensive primary and secondary research conducted from January to August 2018, including literature reviews, data research, and dozens of expert interviews. Key public and private sources consulted include: Euromonitor International, World Bank, International Monetary Fund, World Health Organization, International Labour Organization, World Travel & Tourism Council, World Tourism Organization (UNWTO), U.S. Bureau of Labor Statistics, U.S. National Institutes of Health, ISPA, IHRSA, global travel promotion and booking websites; along with numerous country-specific and industry-specific organizations, databases, publications and media sources (e.g., the *2018 Global Wellness Trends Report* by the Global Wellness Summit, *Spa Business Handbook, Spa Business Magazine*, etc.).

The authors also benefited from the industry insights and technical inputs from several Global Wellness Institute Initiatives, including: Wellness Tourism Initiative, Wellness Communities Initiative, Wellness at Work Initiative, and Hot Springs Initiative.

II. WELLNESS LIFESTYLE REAL ESTATE

Wellness real estate is a fast-growing $134b industry, buoyed by rising health consciousness and a desire to bring wellness into the places where we spend the majority of our time.

GWI estimates that the global wellness real estate sector is worth $134 billion in 2017, growing at 6.4% annually since 2015. For comparison, this is about 1.5% of the total annual global construction market and about half the size of the global green building industry.[25] GWI defines wellness real estate as ***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.*** Note that *wellness real estate* is broader than (but encompasses) *wellness lifestyle real estate,* which focuses on the residential component and is the primary focus of this chapter.[26]

Wellness Real Estate Market by Region, 2015 and 2017

	Wellness Real Estate Market (US$ billions)	
	2015	2017
North America	$47.94	$54.84
Asia-Pacific	$40.66	$46.78
Europe	$29.05	$31.73
Middle East-North Africa	$0.46	$0.51
Latin America-Caribbean	$0.35	$0.36
Sub-Saharan Africa	$0.09	$0.10
Total Wellness Real Estate Industry	**$118.56**	**$134.32**

Note: Figures may not sum to total due to rounding. Source: Estimates by the Global Wellness Institute, based upon construction industry data from the United Nations

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[25] U.S. Green Building Council (2015). *The Business Case for Green Building.* https://www.usgbc.org/articles/business-case-green-building.

[26] Because it is impossible to separate out the residential and non-residential components in commercial/institutional projects (e.g., mixed-use, hospitality, etc.), GWI estimates *wellness real estate* in aggregate, although the focus of this chapter is on the residential component or *wellness lifestyle real estate*.

Around the world, there is rising consumer interest in extending our wellness experiences from our vacation destinations and leisure activities to our homes and everyday lives. A number of destination spas and wellness resorts are adding a residential component for customers looking for second homes, vacation properties, or to live a full-time wellness lifestyle. Upscale residential projects are adding wellness components to appeal to high-income buyers/renters. Demand also comes from the middle and upper-middle income markets for homes and neighborhoods that support a healthy lifestyle. Increasingly, there are projects in the affordable and lower-income segment, where buildings are incorporating wellness design features to address crucial public health needs, often in collaboration with public policy initiatives.

Overall, the wellness real estate market is heavily concentrated in North America, Asia, and Europe. The United States, along with a few key countries in Asia (China, Australia, India) and Europe (United Kingdom, Germany), account for three-quarters of the industry.

Top Twenty Wellness Real Estate Markets, 2017

	Wellness Real Estate Market (US$ millions)	Rank in 2017
United States	$52,481.2	**1**
China	$19,939.6	**2**
Australia	$9,471.4	**3**
United Kingdom	$9,016.4	**4**
Germany	$6,439.9	**5**
India	$6,088.3	**6**
France	$5,814.5	**7**
South Korea	$4,194.8	**8**
Canada	$2,355.1	**9**
Japan	$2,246.4	**10**
Netherlands	$1,850.5	**11**
Switzerland	$1,607.0	**12**
Norway	$1,216.7	**13**
Sweden	$1,139.9	**14**
Austria	$1,099.1	**15**
Italy	$1,001.0	**16**
Malaysia	$917.1	**17**
Singapore	$818.7	**18**
New Zealand	$802.6	**19**
Taiwan	$652.0	**20**

Source: Estimates by the Global Wellness Institute, based upon construction industry data from the United Nations

Investment in our homes should also be a strategic investment in our health.

For most people, our home represents our most important personal investment and one of our largest expenditures (about 20% of all consumer spending, or more than $9 trillion in 2017[27]), so it is only logical that our home should also be an investment in our health and wellbeing. Yet, wellness lifestyle real estate is a nascent industry that is not well understood by consumers, real estate developers, and investors. In the 2018 GWI research report, *Build Well to Live Well,* we developed definitions for *wellness lifestyle real estate* and *wellness communities* to promote better understanding of this important sector.

Defining *Wellness Lifestyle Real Estate* and *Wellness Communities*

Wellness lifestyle real estate is defined as homes that are proactively designed and built to support the holistic health of their residents.

Wellness community is a group of people living in close proximity who share common goals, interests, and experiences in proactively pursuing wellness across its many dimensions. It can be rooted in a purpose-built physical space, or it can be cultivated around shared culture or social networks without purpose-built structures.

The power of wellness lifestyle real estate lies in its potential to foster wellness communities. However, to do so requires a clear intention, along with supporting design and operational principles:

- **From "do no harm" to optimizing wellness:** Not only preventing sick buildings but intentionally building homes that help us enhance our health and wellbeing.
- **From passive to active wellness:** Encouraging proactive behaviors and habits that drive wellness.
- **From hardware to software:** Complementing bricks and mortar with policies, management, and programing that build social connections and nurture healthy behaviors.
- **From "me" to "we:"** Creating awareness that our individual health and wellbeing is intrinsically linked to our broader environment and the social fabric around us.

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[27] Global Wellness Institute analysis of global consumer expenditures data from Euromonitor International.

Consumers are demanding healthier built environments and are willing to pay more for them.

GWI's review of more than 220 academic, peer-reviewed, and independent studies found solid evidence that homebuyers are willing to pay more for wellness-enhancing features, including:[28]

- **Proximity and easy access to high-quality natural and recreational amenities:** Price premiums of 3-12% for nearby open space, greenbelts, and conservation areas; 4-20% for nearby parks and multi-use trails; and 5-15% for recreational programming and amenities within the community (e.g., fitness centers, swimming pools, golf courses, etc.).
- **New Urbanist features such as mixed-use, higher-density, transit-oriented, and traditional neighborhood design:** Price premiums of 5-20% across the United States.
- **Neighborhood walkability:** Price premiums of $4,000-$34,000 for above-average walkability, or a 1% increase in home price for every one-point increase in a neighborhood's walkability score in the United States.[29]
- **Sustainability features:** Price premiums of 1-10% for homes with green certification labels and energy-efficient features.
- **Healthy home features:** Recent surveys in the United States, United Kingdom, India, and China indicate strong consumer demand, with a range of 30% to nearly 90% of surveyed consumers indicating a willingness to pay extra for a healthier home.

GWI estimates that wellness lifestyle real estate and community projects positioned at the middle and upper ends of the market are currently achieving **price premiums of 10-25%**. One reason for this premium is that there is not enough supply to meet demand. Based on a survey conducted by the market research firm American LIVES Inc., GWI estimates that there are **1.3 million potential buyers each year in the United States** alone for wellness-infused homes and communities.[30]

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[28] GWI synthesis of data, based on a literature review of 220 scholarly articles, peer-reviewed studies, and independent reports, spanning more than 20 countries. For more information, see Global Wellness Institute (2018). *Build Well to Live Well: Wellness Lifestyle Real Estate and Communities.*

[29] See: Cortright, J. (2009). *Walking the Walk: How Walkability Raises Home Values in U.S. Cities.* Cleveland, OH: CEOs for Cities. Bokhari, S. (2016). How Much is a Point of Walk Score Worth? *RedFin Real Estate News & Analysis.*

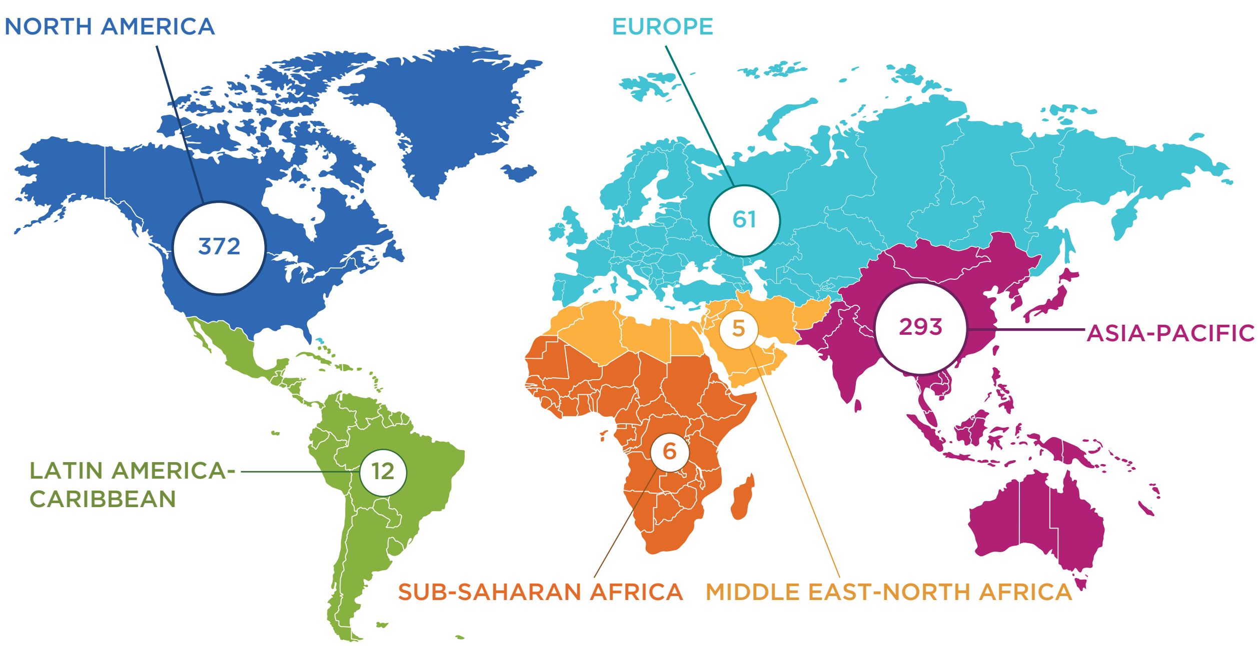
[30] See: Global Wellness Institute (2018). *Build Well to Live Well: Wellness Lifestyle Real Estate and Communities.*

As the global pipeline of wellness lifestyle real estate projects grows, there is enormous potential for differentiation based on market needs, specific preferences, and unique site characteristics.

GWI's research found more than 740 wellness lifestyle real estate and community developments built, partially built, or in development, across 34 countries (as of November 2017), and this number is growing every day. These include master-planned communities, multi-family housing, urban districts and mixed-use projects, resort- and spa-based real estate, and other types of projects around the world.

Wellness Lifestyle Real Estate Pipeline in 2017:

Over **740** projects across **34** countries



Note: Estimates as of November 2017. Source: Global Wellness Institute.

Looking to the future, GWI has identified several emerging wellness living concepts that we predict will drive the future development of wellness lifestyle real estate and will push the design of healthy living environments to the next level:

- **Blurring the lines between home, work, and leisure:** Strategic colocation and integration of homes, coworking facilities, and ample wellness amenities and programming (in both urban and suburban contexts), in response to the rapid rise of remote work, sharing economy, and the travails of loneliness and work-life balance.
- **Making healthy homes affordable:** Developers collaborating with governments to target lower-income and vulnerable populations who are at the highest risk for many health conditions.
- **Bringing back multigenerational and diverse neighborhoods:** Catering to people seeking communities with greater diversity of ages, life stages, backgrounds, and social classes, recognizing the growing evidence that social connections in the physical realm are essential for our health and wellbeing, our society, and our economy.
- **Catalyzing medical industry clusters and health services to build wellness communities:** Building world-class wellness communities by creating a geographic concentration of cutting-edge medical industry companies and research organizations (the economic concept of industry clusters); a concentration of high-quality hospitals, clinics, and health services for consumers; and holistically-designed wellness-infused homes and neighborhoods.
- **Moving from green to regenerative living:** Moving beyond green building certifications to create innovative, regenerative residential communities on the cutting edge of green, biophilic, sustainable, and healthy design. These communities will produce their own healthy food and renewable energy, clean the air, recycle their own water, and be net positive for people and planet.
- **Leveraging technologies to create smart-healthy homes and cities:** Harnessing future technologies (advanced telemedicine, smart homes, sensors, artificial intelligence, etc.) to bring state-of-the-art on-demand wellness into the design of homes, neighborhoods, and cities.
- **Rediscovering hot springs as a wellness living anchor:** A rise of new residences located near natural thermal and mineral springs (both primary and vacation homes) – as people rediscover their therapeutic properties and the benefits of communal bathing – and the redevelopment of historic spa towns as holistic wellness living communities.

III. WORKPLACE WELLNESS

Valued at $48 billion, the workplace wellness market remains small in comparison to the massive economic burden and productivity losses associated with an unwell workforce and widespread worker disengagement.

GWI measures the size of the global workplace wellness industry by estimating the ***expenditures made by employers to improve employee wellness.*** These include a wide variety of services, products, and platforms, such as health screening assessments, diagnostic tests, incentive programs, wearable devices, counseling services, etc., and they serve a wide range of needs, from exercise, healthy eating, and sleep, to chronic illness, obesity, addiction, depression, and stress. GWI estimates that this market grew by 4.8% annually over the past two years to reach $47.5 billion in 2017. Much of this spending is motivated by employers' desires to lower healthcare costs; improve morale, retention, and recruitment; and increase productivity and competitiveness.

Workplace Wellness Market Size by Region, 2015 and 2017

	No. of Workers Covered by Workplace Wellness Programs & Services (millions)		Workplace Wellness Expenditures (US$ billions)	
	2015	**2017**	**2015**	**2017**
Europe	96.2	101.3	$16.10	$17.74
North America	89.8	93.9	$16.16	$17.56
Asia-Pacific	92.6	97.8	$8.41	$9.29
Latin America-Caribbean	14.1	14.3	$1.23	$1.31
Middle East-North Africa	9.1	10.2	$1.12	$1.29
Sub-Saharan Africa	3.7	4.4	$0.28	$0.33
Total Workplace Wellness Industry	**305.5**	**321.7**	**$43.29**	**$47.52**

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

Source: Estimates by the Global Wellness Institute, based upon data from the International Labour Organization, World Bank, and Buck Consultants

The workplace wellness market is small when compared to the economic burden of an unwell and disengaged workforce – a cost estimated by GWI at 10-15% of global economic output when we factor in the medical costs and productivity losses caused by chronic diseases, work-related stress, injuries and illnesses, and widespread disengagement at work.[31] This estimate does not include the human suffering and the unsustainable burden on the healthcare system associated with treating an unwell workforce. A recently-released book by Stanford Business School professor Jeffrey Pfeffer claims that workplace-related stress – a combination of long or unpredictable hours, high job demands, low autonomy, and lack of health insurance – is responsible for more than 120,000 deaths a year and roughly 5-8% of annual healthcare costs in the United States alone.[32]

Overall, the global market for workplace wellness is concentrated in the high-income countries in North America, Western Europe, and Asia. Together, the top twenty markets in workplace wellness account for nearly 85% of global spending. The United States remains by far the world's largest market for workplace wellness expenditures, estimated at more than $15 billion. Since the healthcare burden is mostly borne by employers in the United States, U.S. companies have strong incentives to control escalating medical costs while also improving productivity.

Top Twenty Workplace Wellness Markets, 2017

	Workplace Wellness Expenditures (US$ billions)	Rank in 2017
United States	$15.68	**1**
Japan	$3.92	**2**
Germany	$3.54	**3**
United Kingdom	$2.55	**4**
France	$2.28	**5**
Canada	$1.88	**6**
Italy	$1.67	**7**
South Korea	$1.52	**8**
Spain	$1.36	**9**
Australia	$1.11	**10**
Netherlands	$0.72	**11**
Sweden	$0.67	**12**
Taiwan	$0.63	**13**
China	$0.50	**14**
Switzerland	$0.43	**15**
Austria	$0.41	**16**
Belgium	$0.41	**17**
Norway	$0.39	**18**
Denmark	$0.38	**19**
Finland	$0.34	**20**

Source: Estimates by the Global Wellness Institute, based upon data from the International Labour Organization, World Bank, and Conduent/Buck Consultants

[31] See: Global Wellness Institute (2016). *The Future of Wellness at Work.*

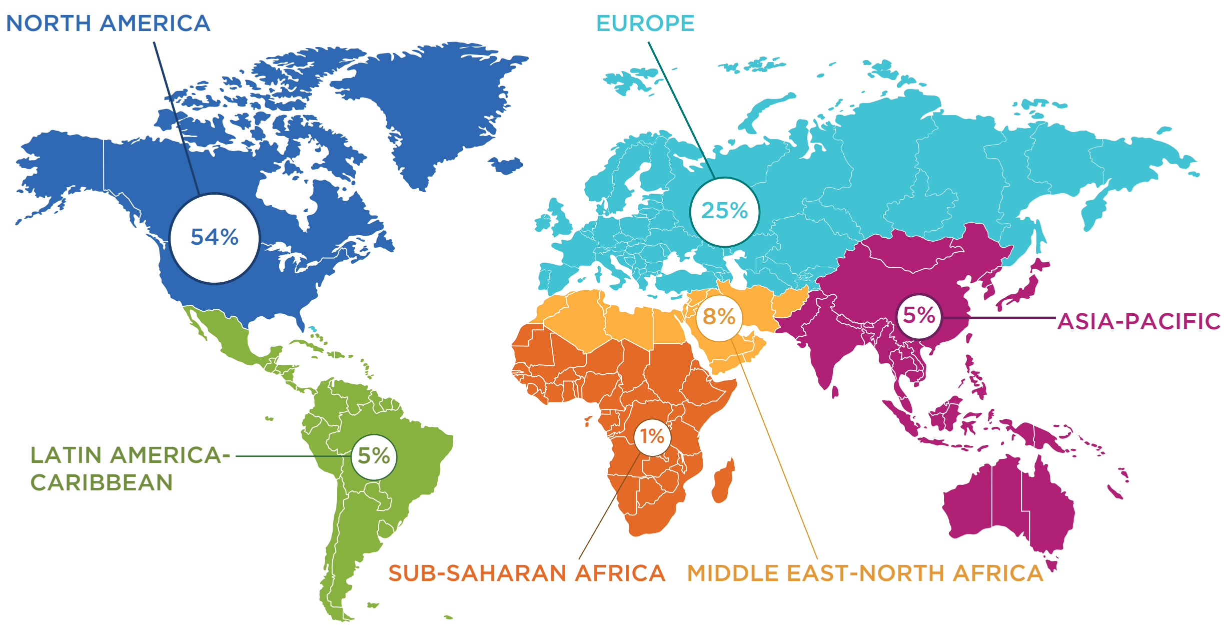
[32] Pfeffer, J. (2018). *Dying for a Paycheck.* New York, NY: Harper Collins.

Less than 10% of the global workforce benefits from workplace wellness initiatives. The majority of workers are more concerned with meeting basic needs, such as earning a living wage, job stability, workplace safety, and access to basic healthcare.

GWI estimates that less than 10% of the global workforce is covered by any kind of workplace wellness programs or services, and these workers remain highly concentrated in North America and Europe. This luckier slice of the workforce mostly lives in the world's wealthiest economies or works for large or multinational companies. For these workers, workplace wellness concerns typically revolve around preventable/chronic disease, mitigating stress, improving work-life balance, enhancing engagement, and improving workplace culture and management structures. Yet, work-related fatalities and injuries remain far too high around the world, and billions of workers do not have access to basic healthcare and essential medications, do not have a stable job, do not make a living wage, and work in fundamentally dangerous or unhealthy conditions. Globally, only one in four workers are in full-time positions with a permanent contract and job security.[33] As we advance the conversation on wellness at work, we must not forget this "ninety percent" and the importance of protecting them and enhancing their welfare.

Access to Workplace Wellness in 2017

Only **10%** of the world's workers have access to workplace wellness programs & services



Percent of employed workers in each region who have access to workplace wellness programs/services.

Source: Estimates by the Global Wellness Institute, based upon data from the International Labour Organization, World Bank, and Conduent/Buck Consultants.

[33] International Labour Organization (2015). *World Employment and Social Outlook: The Changing Nature of Jobs 2015.* Geneva, Switzerland: International Labour Office.

Several key shifts are driving a new “thrive” revolution at work.

As we look to the future, conversations around wellness at work will no longer center on mitigating work-related ills, but on enhancing motivation, commitment, creativity, flow, cognitive abilities, etc. – in other words, thriving at work. The Global Wellness Institute’s Wellness at Work initiative recently released a white paper that outlines many key shifts driving this “thrive” revolution. Among them are:[34]

- **Thriving and the wellbeing of “WE:”** Employers recognize that thriving is core to sustainable success, and a thriving work culture is key to attracting and retaining talent. Technological, economic, cultural, and demographic shifts are changing the nature and meaning of work as a human experience, requiring work to be reinvented in a way that enhances human potential while bringing people joy and wellbeing every day. As work units evolve to teams, global networks, partnerships, and ad hoc project groups, we need a high-trust environment of mutual respect and psychological safety to improve shared outcomes.
- **Purpose-driven workplace and conscious evolution of leadership:** A leadership evolution has powered many of the shifts toward a thriving workplace. More leaders are realizing that technology, the built environment, culture, brands, operations, etc. have impacts beyond profits and are trying to cultivate more conscious and caring worldviews. Employers that build purpose-driven workplaces are better positioned to energize employees and customer relationships, direct operations with clarity and effectiveness, and (re)build trust between business and society.
- **Women-friendly workplaces and deep inclusivity:** Women-friendly workplaces bring a focus on diversity, the challenges of care-giving, pay inequities, ageism, and other well-being concerns that can particularly plague women. Harnessing all talent requires deep inclusion. Research suggests that true diversity and inclusion will produce more innovative, engaged, and high-performing teams; increase profitability; enhance brand appeal; and attract talent.
- **Mental wellness and individualized wellbeing:** Employee mental wellness can foster happiness, generativity, effectiveness, and wisdom at work. Brain sciences and new technologies have advanced ways to boost brain activity, reduce stress, and increase productivity. Meanwhile, new technologies and scientific discoveries (e.g. DNA and other biomarker testing, cognitive technologies for behavior change, etc.) are facilitating an unprecedented degree of individualized and personalized diagnostics and employee wellbeing solutions.

[34] Moorefield, R. (June, 2018). *Ten Shifts Driving a New ‘Thrive’ Revolution at Work.* Miami, FL: Global Wellness Institute. https://globalwellnessinstitute.org/wp-content/uploads/2018/06/WorkplaceWellnessTrends_April2018.pdf.

IV. WELLNESS TOURISM

At $639 billion, wellness tourism is a significant and fast-growing segment of global tourism.

In the 2013 *Wellness Tourism Economy* inaugural study, GWI defined wellness tourism as ***travel associated with the pursuit of maintaining or enhancing one's personal wellbeing,*** and we measured the size of global wellness tourism for the first time. Fast forward five years, wellness tourism is now widely recognized as a fast-growing, high-opportunity tourism niche segment. GWI estimates that wellness tourism expenditures reached $639.4 billion in 2017, as compared to $563.2 billion in 2015. The sector's 6.5% annual growth rate from 2015-2017 is more than double the 3.2% annual growth rate for general tourism. Wellness travelers made 830 million international and domestic wellness trips in 2017, which is 139 million more than in 2015. Wellness trips account for 6.6% of all tourism trips but represent 16.8% of total tourism expenditures. This is because wellness travelers tend to spend much more per trip than the average traveler.

Europe remains the region with the largest number of wellness trips. North America continues to lead in wellness tourism expenditures because average spending per trip is higher. In the past five years, Asia has made the most gains in the number of wellness trips and wellness tourism expenditures, with demand stimulated by strong economies and an expanding middle class.

Wellness Tourism Trips and Expenditures by Region, 2015 and 2017

	Number of Trips (millions)		**Expenditures** (US$ billions)	
	2015	**2017**	**2015**	**2017**
North America	186.5	204.1	$215.7	$241.7
Europe	249.9	291.8	$193.4	$210.8
Asia-Pacific	193.9	257.6	$111.2	$136.7
Latin America-Caribbean	46.8	59.1	$30.4	$34.8
Middle East-North Africa	8.5	11.0	$8.3	$10.7
Africa	5.4	6.5	$4.2	$4.8
Total Wellness Tourism Industry	**691.0**	**830.0**	**$563.2**	**$639.4**

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Figures may not sum to total due to rounding.

Source: Estimates by the Global Wellness Institute, based on tourism industry data from Euromonitor International

Wellness tourism is heavily concentrated in several major countries across North America, Europe, and Asia-Pacific. The United States alone accounts for over one-third of global revenues. The top five countries (United States, Germany, China, France, Japan) represent 59% of the global market, and the top twenty countries represent 84%. Since 2013, China has continued to move up in the rankings for wellness tourism expenditures (and is now in the top three). India has moved into the top ten, while Malaysia has entered the top twenty for the first time (supplanting Russia).

Top Twenty Wellness Tourism Destination Markets, 2017

	Number of Trips (millions)	Direct Employment (millions)	Expenditures (US$ billions)	Rank in 2017
United States	176.5	1.88	$226.0	**1**
Germany	66.1	1.13	$65.7	**2**
China	70.2	1.78	$31.7	**3**
France	32.4	0.31	$30.7	**4**
Japan	40.5	0.18	$22.5	**5**
Austria	16.8	0.16	$16.5	**6**
India	56.0	3.74	$16.3	**7**
Canada	27.5	0.29	$15.7	**8**
United Kingdom	23.2	0.20	$13.5	**9**
Italy	13.1	0.15	$13.4	**10**
Mexico	18.7	0.49	$12.8	**11**
Switzerland	9.7	0.10	$12.6	**12**
Thailand	12.5	0.53	$12.0	**13**
Australia	10.0	0.11	$10.5	**14**
Spain	18.8	0.10	$9.9	**15**
South Korea	19.6	0.13	$7.2	**16**
Indonesia	8.3	1.31	$6.9	**17**
Malaysia	8.3	0.18	$5.0	**18**
Turkey	9.1	0.05	$4.4	**19**
Brazil	10.5	0.13	$4.1	**20**

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips.

Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International

Wellness tourism growth is distributed across the world.

The rapid growth of wellness tourism around the world has been stimulated by a rising global middle class, increasing consumer desire to adopt a wellness lifestyle, and a growing interest in experiential travel. The developing markets in Asia-Pacific, Latin America-Caribbean, Middle East-North Africa, and Sub-Saharan Africa have posted robust growth in recent years. While these regions represented only 40% of wellness trips in 2017, they accounted for 57% of the increase in trips since 2015. China and India are both growth leaders, adding over 12 million and 17 million wellness trips respectively (inbound and domestic) from 2015-2017. Wellness tourism continues to grow steadily across the leading developed markets, including the United States and several major European countries.

Leading Growth Markets for Wellness Tourism Trips, 2015-2017

	Number of Wellness Arrivals/Trips Added from 2015-2017 (millions)	Average Annual Growth Rate from 2015-2017
China	21.9	20.6%
India	17.3	20.3%
United States	15.4	4.7%
Germany	7.5	6.2%
Spain	5.2	17.5%
Mexico	3.3	10.3%
Malaysia	3.3	28.6%
Vietnam	3.2	22.8%
Chile	3.2	29.3%
Thailand	2.7	13.1%
Japan	2.7	3.5%
Italy	2.7	12.2%
Indonesia	2.7	21.5%
United Kingdom	2.6	6.1%
Russia	2.3	8.4%
Czech Republic	2.2	18.1%
Austria	2.2	7.3%
Canada	2.2	4.2%
Poland	2.0	14.7%
Brazil	1.9	10.4%
France	1.8	2.8%
South Korea	1.6	4.5%
Australia	1.5	8.3%
Slovakia	1.4	36.9%
Philippines	1.1	31.1%

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International

Secondary wellness travelers account for the bulk of wellness tourism trips and growth.

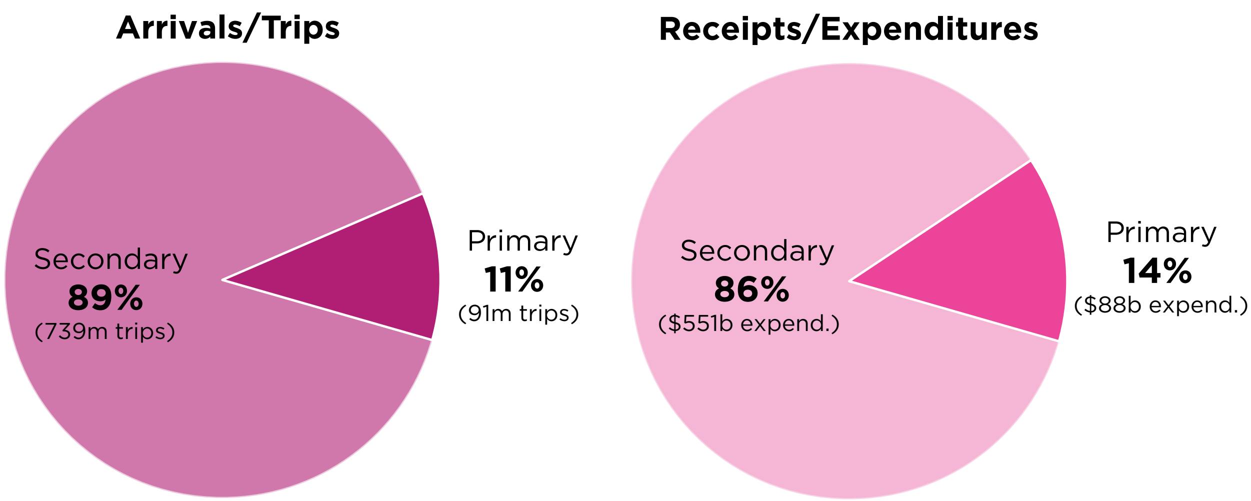
Wellness travelers comprise a broad and diverse group of consumers with many motivations, interests, and values. GWI defines and measures two major segments:

Primary wellness travelers: A traveler whose trip or destination choice is primarily motivated by wellness.

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

The bulk of wellness travel is done by secondary wellness tourists – i.e., those who seek wellness experiences during their travel, when wellness is not the primary motivation for their trip or destination. Secondary wellness tourism accounted for 89% of wellness tourism trips and 86% of wellness tourism expenditures in 2017. Secondary wellness tourism also continues to grow at a faster rate than primary wellness tourism; secondary wellness tourism trips grew by 10% annually, while primary trips grew by 8% annually from 2015-2017.

Secondary wellness travel leads in trips and expenditures

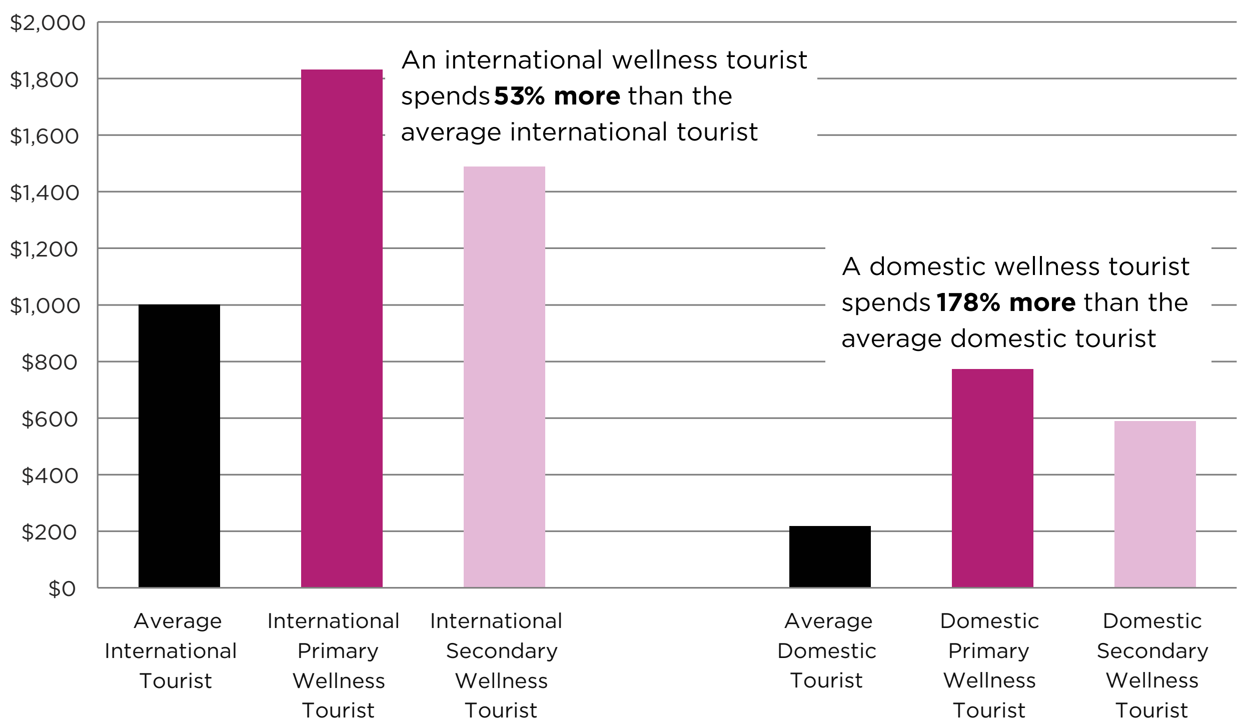


Note: These figures combine both international/inbound and domestic wellness tourism spending. Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International

Wellness tourism is high-yield tourism.

Wellness travelers spend more per trip than the average tourist, and this holds true for both domestic and international travelers. In 2017, international wellness tourists on average spent $1,528 per trip, 53% more than the typical international tourist. The premium for domestic wellness tourists is even higher, at $609 per trip and 178% more than the typical domestic tourist. This is because wellness travelers are typically more affluent, educated, and well-traveled, and they tend to be early adopters who will try out new and novel experiences.

Wellness Tourism Spending Premiums, 2017



Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International

Wellness tourism creates opportunities for wellness and other businesses.

The $639.4 billion spent globally by wellness travelers is distributed among many segments of the tourism industry, from food and lodging, to activities, excursions, shopping, and other services. Within each segment, some expenditures may include wellness-focused activities (such as visiting a hot spring, getting a massage, or taking a meditation or fitness class), while other expenditures may be "generic" (such as transportation, general food and lodging, or buying souvenirs). As more consumers incorporate wellness into their lifestyles, there are many opportunities for the "generic" businesses to infuse wellness into their offerings, which can help them differentiate, provide more value, and capture higher spending by wellness travelers. For example, mainstream hotel brands are now promoting wellness features such as in-room exercise equipment and special beds and lighting that help people sleep better. Airports are offering in-transit gyms, spas, and walking circuits around their terminals, and airlines are promoting in-flight meditation and stretching apps. Museums offer yoga and meditation classes right in their art galleries, while gift shops stock products connected to unique local wellness traditions and stories.

Wellness Tourism Industry in 2017

Data combine both inbound/international and domestic wellness tourism spending, and also include both primary and secondary wellness trips.

Source: Estimates by the Global Wellness Institute, based on tourism industry data from Euromonitor International.

What is included in wellness tourism?

GWI measures the size of the wellness tourism industry by estimating all expenditures made by wellness tourists – both international and domestic – including spending on lodging, food and beverage, activities and excursions, shopping, and in-country transportation:[35]

- **International wellness tourism expenditures:** 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.

Within each of the international and domestic tourism segments, we estimate the portion of trips and expenditures that are represented by wellness tourists, including both the primary and secondary wellness tourism segments:

- **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.

Finally, we aggregate the spending of primary and secondary wellness tourists, both international/inbound and domestic, across 212 countries, to arrive at the size of the global wellness tourism industry.

[35] Following the convention for calculation of international tourism statistics, we exclude international airfare from the calculation of wellness tourism. The international airfare paid by international tourists does not necessarily accrue to the country he/she is visiting. Therefore, expenditures on international airfare are typically not included in the tourism receipts reported by individual countries, but instead are covered in a different line item in balance of payment statistics.

V. THE SPA ECONOMY

The spa economy has grown in number of facilities, revenues, and employment, driven by strong economic growth and rising consumer interest in wellness.

Ten years ago, GWI unveiled *The Global Spa Economy* 2007, where we defined spas as ***establishments that promote wellness through the provision of therapeutic and other professional services aimed at renewing the body, mind, and spirit,*** and we estimated the size of the global spa economy for the first time. Consistent with the methodology established in that study, GWI estimates that the number of spas has grown to over 149,000, earning $93.6 billion in revenues and employing nearly 2.6 million workers in 2017. This represents 9.9% annual revenue growth, which is much higher than the pace observed in the previous two-year period. The main drivers of this growth are rising consumer incomes and an increasing propensity to spend on all things related to wellness.

Asia-Pacific continues to host the largest number of spas and also added the greatest number of new spas from 2015-2017. Europe led in total spa revenues in 2017.

Spa Facilities and Revenues by Region, 2015 and 2017

	Number of Spas		Spa Revenues (US$ millions)	
	2015	**2017**	**2015**	**2017**
Europe	37,420	46,282	$27.5	$33.3
Asia-Pacific	38,819	48,679	$21.4	$26.5
North America	28,306	30,394	$20.6	$22.9
Latin America-Caribbean	10,269	13,856	$4.9	$6.6
Middle East-North Africa	4,465	6,057	$2.1	$2.8
Sub-Saharan Africa	2,316	3,984	$1.1	$1.6
Total	**121,595**	***149,252**	**$77.6**	***$93.6**

*Note: Revenue figures may not sum to total due to rounding. * The large increase in spas and spa revenues is not entirely due to new builds, but also due to a dramatic increase in the number of hotels/resorts listing themselves and their spa facilities/services on global online booking sites, especially in emerging market countries.*

Source: Global Wellness Institute

The global spa industry remains quite concentrated, with the top five countries (United States, China, Germany, Japan, and France) accounting for 48% of global revenues, while the top twenty countries represent 77% of the global market. The industry is becoming slightly more dispersed over time; just two years ago the top five and top twenty markets held an even higher share of global revenues (51% and 80%, respectively). In 2017, 18 countries had annual spa revenues exceeding $1 billion. Since 2017, India has moved into the top ten countries and Brazil has moved into the top twenty, while Indonesia and Australia each surpassed the $1b threshold for the first time.

Top Twenty Spa Markets, 2017

	Number of Spas	Spa Facility Employment	Spa Facility Revenues (US$ billions)	Rank in 2017
United States	26,317	395,707	$20.83	**1**
China	15,664	376,576	$8.24	**2**
Germany	7,060	153,660	$6.66	**3**
Japan	7,359	121,781	$5.72	**4**
France	4,653	88,709	$3.59	**5**
Italy	3,954	83,139	$3.24	**6**
United Kingdom	3,547	62,849	$2.70	**7**
Spain	3,304	58,532	$2.46	**8**
Russia	3,446	114,261	$2.29	**9**
India	5,990	74,977	$2.13	**10**
Canada	4,077	47,712	$2.05	**11**
Austria	2,229	48,674	$2.05	**12**
Mexico	3,837	61,718	$1.77	**13**
South Korea	3,146	41,434	$1.62	**14**
Switzerland	978	23,798	$1.41	**15**
Thailand	2,760	84,176	$1.32	**16**
Indonesia	2,692	77,309	$1.30	**17**
Australia	1,593	16,303	$1.09	**18**
United Arab Emirates	933	25,569	$0.87	**19**
Brazil	2,211	31,043	$0.81	**20**

Source: Global Wellness Institute

Hotel/resort spas remain the fastest growing category.

Spas can come in many forms and sizes across different countries and regions. GWI defines and measures six categories of spas in order to track their growth (see *Appendix A* for category definitions). From 2015-2017, the hotel/resort spas category added the largest number of spas and gained the most revenue growth. Since 2015, hotel/resort spas have also surpassed day/club/salon spas in their share of total global revenues.

The rapid growth in the hotel/resort spas category is underpinned by the strong growth in wellness tourism (see Chapter IV), as more consumers seek to bring their wellness lifestyle with them when they travel. In response, more hotels and resorts are adding and marketing spa services and facilities to accommodate growing demand. Since much of the growth is in smaller and lower-tier properties, typically with more modest facilities, average revenue per hotel/resort spa has fallen significantly in recent years. *A note on the 2017 hotel/resort spa numbers as compared to 2015:* not all of the dramatic increase in spas and revenues in this category is due to new builds. Our methodology includes surveying global online booking sites, and the last few years have brought massive growth in hotel/resort listings, as well as properties listing themselves as providing spa facilities and services, particularly in the emerging markets of Sub-Saharan Africa and Latin America and the Caribbean. [36]

Spa Facilities and Revenues by Type, 2015 and 2017

	Number of Spas		Spa Facility Revenues (US$ billions)	
	2015	2017	2015	2017
Hotel/Resort Spas	30,180	*48,248	$25.6	*$36.4
Day/Club/Salon Spas	64,262	68,917	$30.8	$33.4
Destination Spas & Health Resorts	2,374	2,633	$7.7	$8.3
Medical Spas	5,502	6,827	$5.7	$6.6
Thermal/Mineral Springs Spas	7,171	8,816	$4.7	$5.3
Other Spas	12,106	13,811	$3.1	$3.7
Total	**121,595**	**149,252**	**$77.6**	**$93.6**

*Note: Revenue figures may not sum to total due to rounding. See Appendix A for descriptions of the spa categories. *See text above for notes on hotel/resort spa category growth.*
Source: Global Wellness Institute

[36] For example, the number of lodging properties listed in Bookings.com (the largest worldwide accommodations search platform), increased by over 80% globally from 2015 to 2017, with listings in regions such as Sub-Saharan Africa and Latin America-Caribbean more than doubling. Global listings of lodging properties with spas increased by over 35% during this period.

Adjacent, supporting sectors add another $25 billion to the global spa economy.

The spa industry is greater than just spa facilities operations. A host of other sectors enable and support spa businesses, including capital investment; consulting; training of spa therapists and education of managers; and associations, media, and events businesses that promote spas. In 2017, these related sectors added $25.2 billion to the spa facilities revenues of $93.6 billion, to create a **$118.8 billion global spa economy.**

Global Spa Economy, 2015 and 2017

	Spa Economy Sector Revenues (US$ billions)	
	2015	2017
Spa Facility Operations	$77.57	$93.64
Spa Capital Investments	$19.82	$23.70
Spa Education	$0.85	$1.02
Spa Media, Associations, & Events	$0.25	$0.28
Spa Consulting	$0.12	$0.15
Total Spa Economy	**$98.62**	**$118.79**

Note: Revenue figures may not sum to total due to rounding. See Appendix A for descriptions of the spa economy sectors.
Source: Global Wellness Institute

A growing spa industry means a greater need for trained staff.

Spa facilities employed nearly 2.6 million people in 2017, including over 1.4 million spa therapists and 260,000 spa managers and directors. Since 2015, spas added over 444,000 jobs to the global economy.

GWI projects that spa employment will continue to grow along with the spa industry, reaching 3.1 million in 2022. In other words, in order to staff the growing business, the global spa industry will need an additional 300,000 trained spa therapists and 54,000 experienced spa managers/ directors (above the current level) by 2022. The greatest need for additional spa industry staff would be in Asia.

Spa Facility Employment by Region, 2015, 2017, and 2022 (Projected)

	Total Employees in Spa Facilities		
	2015	**2017**	**Projected Need in 2022**
Europe	745,583	883,353	959,938
Asia-Pacific	722,588	918,675	1,209,751
North America	424,174	443,419	543,627
Latin America-Caribbean	164,909	215,899	233,552
Middle East-North Africa	63,982	86,990	110,499
Sub-Saharan Africa	28,911	46,171	76,537
Total	**2,150,147**	**2,594,507**	**3,133,904**

Source: Global Wellness Institute

VI. THERMAL/MINERAL SPRINGS

The thermal/mineral springs industry has continued its strong growth as consumers turn to water for relaxation, community, and healing.

GWI defines the thermal/mineral springs industry as encompassing ***revenue-earning business establishments associated with the wellness, recreational, and therapeutic uses of waters with special properties.*** Consistent with that definition and our previous methodologies, we estimate that there are 34,057 thermal/mineral springs establishments operating in 127 countries. These businesses earned $56.2 billion in revenues in 2017, and they employed an estimated 1.8 million workers.

The thermal/mineral springs industry is heavily concentrated in Asia-Pacific and Europe, reflecting the centuries-old history of water-based healing and relaxation in these two regions. Together, Asia-Pacific and Europe account for 95% of industry revenues and 94% of establishments.

Thermal/Mineral Springs Facilities and Revenues by Region, 2015 and 2017

	Number of Establishments		Revenues (US$ billions)	
	2015	2017	2015	2017
Asia-Pacific	20,146	25,916	$29.23	$31.60
Europe	5,613	5,967	$19.74	$21.73
Latin America-Caribbean	1,148	1,406	$1.20	$1.60
North America	237	302	$0.57	$0.73
Middle East-North Africa	324	416	$0.24	$0.41
Sub-Saharan Africa	39	50	$0.06	$0.08
Total Thermal/Mineral Springs Industry	**27,507**	***34,057**	**$51.04**	**$56.16**

Note: The thermal/mineral springs revenue estimates include all revenues earned by these establishments, from bathing/swimming offerings, spa/wellness services and other treatments, other recreational activities, food & beverage, lodging, and other services.

*Revenue figures may not sum to total due to rounding. *See text below for notes on establishment growth.*

Source: Global Wellness Institute

A note on the 2017 thermal/mineral springs numbers as compared to 2015: not all of the increase in establishments and revenues in this category is due to new builds. We estimate that about 450 new establishments opened during this time period (primarily in China), with the remaining increase accounted for by improved information as more thermal/mineral springs properties start marketing themselves beyond their local markets to capture the growing consumer and tourist interest in their offerings.

GWI projects a steady and increasing growth trajectory for the thermal/mineral springs industry over the next 5-10 years, building on rapidly growing consumer, business, and government interest in this sector. Thermal/mineral springs bathing experiences appeal to a growing segment of consumers who are seeking to connect with nature, experience cultural traditions, and pursue alternative modalities for healing, rehabilitation, and prevention. Responding to these trends, both private investors and governments across many countries are investing in the sector. In countries with long-established thermal bathing traditions, governments are increasingly promoting these as a key wellness tourism offering. They are investing in renovation and reopening of primitive, outdated, and closed-down facilities, as well as upgrading service standards and training to meet expectations of international tourists. Meanwhile, a number of countries that have thermal water resources but no (or few) commercial bathing facilities are starting to take notice of the opportunities to develop this sector as a new high-value tourism offering (e.g., Kenya, Rwanda, Ethiopia, Saudi Arabia, Cambodia, India).

China continues to see steady investment in new hot springs resorts and strong growth in hot spring-based tourism, while seeking to infuse more wellness-focused services (such as Traditional Chinese Medicine) into its primarily recreational hot spring offerings. Elsewhere around the world, there are several dozen medium- and large-scale thermal mineral/springs projects and major refurbishments/renovations currently in development, in countries as diverse as Brazil, United States, Australia, New Zealand, Japan, Malaysia, Tunisia, France, United Kingdom, Switzerland, and many others.

The thermal/mineral springs industry is concentrated in Asia-Pacific and Europe.

The top twenty countries – concentrated mostly in Asia-Pacific and Europe – represented 92% of the global market in 2017. China and Japan together account for 54% of global revenues and 73% of all establishments. Japan alone, with its estimated 20,972 onsen, is home to nearly two-thirds of all thermal/mineral springs establishments in the world. The remainder of the top markets include a large number of European countries with a long history of using thermal/mineral waters for curative and therapeutic purposes (often subsidized by government insurance systems, although this practice is declining in many countries), along with the United States, Brazil, and Taiwan and South Korea in Asia. The ranked order and list of countries in the top twenty has changed only slightly in recent years. Taiwan has re-entered the top twenty since 2015. Brazil has moved up in the rankings over the last five years, with ongoing strong growth and private/government investment in its thermal springs offerings.

Top Twenty Thermal/Mineral Springs Markets, 2017

	Number of Establishments	Revenues (US$ millions)	Rank in 2017
China	3,900	$17,501.1	**1**
Japan	20,972	$12,795.5	**2**
Germany	1,265	$7,151.9	**3**
Russia	838	$3,667.2	**4**
Italy	768	$1,718.3	**5**
Austria	181	$961.1	**6**
Hungary	546	$793.2	**7**
Brazil	207	$718.0	**8**
Spain	293	$683.1	**9**
Poland	203	$674.5	**10**
Turkey	295	$667.3	**11**
United States	280	$631.0	**12**
Czech Republic	131	$627.8	**13**
France	175	$627.7	**14**
Switzerland	73	$479.5	**15**
Slovenia	86	$451.0	**16**
Slovakia	116	$439.8	**17**
Taiwan	251	$434.5	**18**
Iceland	154	$432.6	**19**
South Korea	108	$336.1	**20**

Source: Global Wellness Institute

Facilities offering value-added spa services account for only one-quarter of thermal/mineral springs establishments but two-thirds of industry revenues.

The thermal/mineral springs industry encompasses a wide variety of different types of establishments; some are recreational in nature (e.g., thermal water swimming pools and waterparks), some are medical or therapeutic (e.g., many sanatoria in Europe), and some focus on wellness-enhancing experiences (e.g., onsen, thermal springs spas) (see Appendix A for additional definitions). Since many thermal/mineral springs facilities overlap multiple categories, for this study GWI simply segments the industry into two groups: establishments that offer spa services (e.g., massage, facials, hydrotherapy, other treatments) alongside their bathing offerings, and those that do not.

In most countries, thermal/mineral bathing and swimming establishments tend to have rustic or traditional facilities and relatively low admission fees, and they tend to target a local market; these represent the majority of establishments around the world in terms of numbers. However, the establishments that offer value-added spa services tend to be higher-end and more tourism-focused, with more developed facilities and a wider range of offerings. While representing only 26% of establishments, the facilities offering spa services account for a much greater share of industry revenues (66%). Revenue growth has also been higher for facilities offering spa services (7.4% average annual growth globally for those with spa services, versus 0.5% for those without, over 2015-2017).

Thermal/Mineral Springs Facilities and Revenues by Type, 2017

	Number of Establishments	**Revenues** (US$ billions)	**Avg. Annual Revenues per Establishment**
With Spa Services	8,816	$37.1	$4,202,972
No Spa Services	25,241	$19.1	$756,825
Total Thermal/Mineral Springs Industry	**34,057**	**$56.2**	**$1,648,904**

Note: The thermal/mineral springs revenue estimates include all revenues earned by these establishments, from bathing/swimming offerings, spa/wellness services and other treatments, other recreational activities, food & beverage, lodging, and other services.

Revenue figures may not sum to total due to rounding. See Appendix A for additional definitions and descriptions of categories.

Source: Global Wellness Institute

VII. REGIONAL HIGHLIGHTS

Asia-Pacific Highlights (2017)

Wellness Real Estate

Wellness Real Estate Market:
$46.8 billion (7.3% CAGR from 2015-2017)

Wellness Lifestyle Real Estate (Residential) Project Pipeline:
293 projects

Workplace Wellness

Number of Workers with Access to Workplace Wellness Programs & Services:
97.8 million (5.2% of employed workers)

Expenditures on Workplace Wellness:
$9.3 billion (5.1% CAGR from 2015-2017)

Wellness Tourism

Number of Wellness Trips:
257.6 million (15.3% CAGR from 2015-2017)

Wellness Tourism Expenditures:
$136.7 billion (10.9% CAGR from 2015-2017)

Average Expenditure per Trip:
$1,741 for intl./inbound (33% premium);
$268 for domestic (120% premium)

Spas

Number of Spas:
48,679 (12.0% CAGR from 2015-2017)

Spa Revenues:
$26.5 billion (11.2% CAGR from 2015-2017)

Spa Employment:
918,675 (12.8% CAGR from 2015-2017)

Thermal/Mineral Springs

Number of Thermal/Mineral Springs Establishments:
25,916 (13.4% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Revenues:
$31.6 billion (4.0% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Employment:
1,244,661 (17.5% CAGR from 2015-2017)

Top Ten Wellness Real Estate Markets in Asia-Pacific, 2017

	Market Size (US$ millions)
China	$19,939.6
Australia	$9,471.4
India	$6,088.3
South Korea	$4,194.8
Japan	$2,246.4
Malaysia	$917.1
Singapore	$818.7
New Zealand	$802.6
Taiwan	$652.0
Indonesia	$570.6

Source: Global Wellness Institute

Top Ten Workplace Wellness Markets in Asia-Pacific, 2017

	# of Workers Covered (millions)	Expenditures (US$ millions)
Japan	21.4	$3,915.2
South Korea	8.3	$1,524.8
Australia	5.9	$1,112.1
Taiwan	3.5	$634.6
China	33.1	$496.7
Indonesia	2.5	$222.6
Hong Kong, China	1.2	$220.4
New Zealand	1.2	$212.5
Singapore	1.0	$186.5
India	9.2	$184.2

Source: Global Wellness Institute

Top Ten Wellness Tourism Markets in Asia-Pacific, 2017

	Number of Trips (millions)	Receipts/Expenditures (US$ millions)
China	70.2	$31,705.9
Japan	40.5	$22,466.1
India	56.0	$16,299.7
Thailand	12.5	$12,018.4
Australia	10.0	$10,520.9
South Korea	19.6	$7,186.6
Indonesia	8.3	$6,928.5
Malaysia	8.3	$5,019.2
Vietnam	9.6	$4,001.1
New Zealand	3.1	$3,036.0

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Source: Global Wellness Institute

Top Ten Spa Markets in Asia-Pacific, 2017

	Number of Spas	Spa Revenues (US$ millions)	Spa Employment
China	15,664	$8,244.5	376,576
Japan	7,359	$5,717.6	121,781
India	5,990	$2,127.1	74,977
South Korea	3,146	$1,620.8	41,434
Thailand	2,760	$1,317.4	84,176
Indonesia	2,692	$1,299.0	77,309
Australia	1,593	$1,089.9	16,303
Hong Kong	825	$813.0	14,037
Vietnam	1,652	$612.8	17,677
Taiwan	959	$585.1	13,280

Source: Global Wellness Institute

Top Ten Thermal/Mineral Springs Markets in Asia-Pacific, 2017

	Number of Establishments	Revenues (US$ millions)
China	3,900	$17,501.1
Japan	20,972	$12,795.5
Taiwan	251	$434.5
South Korea	108	$336.1
New Zealand	120	$285.2
Philippines	153	$70.7
Australia	42	$68.1
Vietnam	32	$23.7
Indonesia	46	$22.9
Thailand	58	$16.9

Source: Global Wellness Institute

Asia-Pacific Developments

Wellness Lifestyle Real Estate

- Australia has been a trailblazer in the region, with its wellness lifestyle real estate market starting in the early-2000s and encouraged by public policy in a number of metropolitan areas. In the last five years, development has ramped up dramatically, as national development companies plan and build a large number of medium- to large-scale suburban mixed-used and master-planned communities in every major metropolitan market across the country.
- China has a rapidly growing number of projects in the pipeline, and the country is poised for robust growth, driven by its growing middle-upper class and rising concerns about unhealthy urban pollution and sprawl. India is similarly positioned for strong growth but is less far along than China in terms of its development pipeline. Wellness-focused projects include luxury high-rises and co-living-style projects in urban centers, suburban master-planned developments, and high-end resort-based homes.
- Healthy growth is occurring in Southeast Asia as well (notably Malaysia, Singapore, and Vietnam), including a growing number of master-planned, mixed-use, and urban high-rise developments. Some of these communities are adding a healthcare angle to target aging populations, leveraging existing medical tourism infrastructure (e.g., Medini Iskandar in Malaysia). These and other Asian countries with a strong wellness tourism sector (e.g., Indonesia and Thailand) are also growing in the resort-based wellness lifestyle real estate segment.

Workplace Wellness

- In Asia, workplace wellness is still not a widespread concept, benefiting only a small slice of workers who mostly work for multinational corporations and in knowledge-intensive industries (finance, consulting, high-tech, etc.). Wellness needs in relation to work vary dramatically from one country to the next – from basic rights and working conditions in lower-/middle-income countries, to stress and work-life balance in the metropolises. In Asia's fast-paced, competitive cities, the costs of unwell workplaces can be very high. A 2017 survey by AIA found that 64% of Hong Kong employees suffer from at least one dimension of work-related stress, 85% have at least one musculoskeletal condition; and health productivity loss averaged 70 days per year.[37] In a 2017 GSK study, more than 67% of workers in China, India, Philippines, and Indonesia felt that their work environment caused their body pain, and more than 60% said their work environment caused them head pain, leading to significant productivity loss and human suffering.[38] These issues are garnering increased attention in Asia, as they become important considerations for worker recruitment and retention, in addition to corporate healthcare costs and competitiveness. A recent survey of office-based companies in the Asia-Pacific region found that about 60% of the companies surveyed either had or intended to start some type of workplace wellness program in the near future.[39]

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[37] AIA Vitality (2018). *Healthiest Workplace Survey.* https://healthiestworkplace.aia.com/regional/eng/#.

[38] GSK Consumer Healthcare (2017). *GSK Global Pain Index 2017, Global Research Report.* https://www.gsk.com/media/3814/global-pain-index-2017-report.pdf.

39 CBRE Group (2017). *Workplace Wellness gains traction in Asia Pacific.* https://www.cbre.com.au/about/media-center/workplace-wellness-gains-traction-in-asia-pacific0.

- In Japan, where grueling work hours have been the norm for decades, and where there is a word (*karoshi*) for "dying from overwork," the government decided to limit overtime work to 720 hours per year, or 60 hours per month. Prime Minister Abe Shinzo has made Work Style Reform (*hatarakikata kaikaku*) part of his core economic agenda, seeking to reverse the trend of dangerously long work hours and the wide wage gaps between "regular" and "non-regular" workers. The law sends a strong signal, and there are signs that work culture is slowly changing in Japan. There are now specialized consulting firms that help companies transform their workplace culture, sometimes resorting to shaming of employees who fail to leave before the lights are turned off. To encourage companies to focus on improving their work environments, the Japanese government will also publicly recognize companies that have taken positive steps toward improving workplace wellness.

Wellness Tourism

- Wellness tourism continues its rapid growth trajectory in the Asia-Pacific region, as more stressed-out people look to travel for respite and rejuvenation. To meet the growing wellness sophistication of Asian travelers, wellness travel offerings have expanded tremendously in breadth and depth, moving far beyond typical offerings such as detox, weight loss, spa treatments in a gazebo, and yoga on the beach. Across Asian destinations, there is tremendous increase in demand for all types of wellness modalities and experiences – from sound therapy to tai chi, and from meditation to spiritual guidance. Many travelers are interested in what a specific place has to offer, creating opportunities for destinations to dig into their own traditions, healing modalities, natural settings, and local ingredients to create a differentiated experience.

- India and other destinations in South Asia and the Himalayan region are capitalizing on the rising global interest in yoga, meditation, and Ayurvedic health to promote wellness tourism. In 2016, India set up a National Medical & Wellness Tourism Promotion board to provide policy advice on these sectors. Measures to support wellness tourism include guidelines for quality and training, financial assistance, and investment promotion for wellness centers catering to tourists. Sri Lanka aggressively promotes wellness tourism with an Ayurvedic flavor, in conjunction with its wildlife, history, nature, and cultural offerings, and the country has seen a tremendous rise in investment and arrivals. Bhutan's distinct focus on low-volume, high-spend tourism (requirement of $200-250 spending per day) aligns well with its growing wellness tourism industry, which has received massive investment that turns its various assets – nature, hot springs, antiquity, culture, and spiritual heritage – into specially curated healing journeys for guests.

- The Chinese wellness tourism sector, while enormous, mostly caters to its domestic travelers. The interest and appetite for wellness travel continue to rise among Chinese consumers, many of whom are rediscovering their wellness heritage and healing systems – from Traditional Chinese Medicine (TCM) and herbal medicine, to qigong, meditation, and martial arts. In recent years China has placed increased attention on developing its health and wellness industry, marketing to both domestic and international tourists the variety of health and wellness services offered across the country, especially those derived from TCM. Since the first Chinese Wellness Tourism Conference was held in 2016, a number of health and wellness conferences have emerged, including the Wellness China Expo, to promote wellness tourism products, investment, and financing.

- Some countries are leveraging their advanced medical industries and wellness sectors to cross-promote wellness and medical tourism, such as Malaysia, Singapore, South Korea, Thailand, and Philippines. Their strengths in both segments allow them to tap into overlapping opportunities, such as: stressed out executives who want a medical checkup, detox, meditation, and life coaching while on vacation; patients recovering from minor procedures (and their families) looking for a healing setting; as well as travelers seeking TCM, Ayurveda, Tibetan, and other integrative medicine and related wellness modalities to address chronic heath or mental wellness issues.

- Australia is both a major source and destination for wellness travelers. Australians are enthusiastic and sophisticated wellness consumers, and the diversity, vast size, and resources of the country create many opportunities to combine wellness with outdoor, nature, adventure, cultural, culinary, and other travel interests. Already home to a number of well-known wellness resorts and hot springs, Australia now also hosts a growing number of festivals and events that focus on wellness. The potential for wellness tourism has caught the government's attention. Tourism Australia has named wellness as one of five key niches for regional tourism development and is now actively promoting private investment in this sector.

Spas

- Asia-Pacific remains the region with the highest number of spas and the fastest growth, with the hotel/resort spa category leading in new investments and openings. Much of the growth is driven by demand from enthusiastic wellness travelers. Whether primary or secondary, wellness travelers seek a wide range of wellness experiences and options at their destination, while also expecting more personalization. Luxury urban hotels and resort hotels have been best able to adapt their facilities and offerings to meet these demands, and numerous luxury hotels have opened with sumptuous spas in diverse markets stretching from China to Vietnam to the Maldives.

- There is a marked increase among Asian hotels and resorts advertising their spas and wellness packages, and also developing offerings to meet the fast-growing demand for retreats along a full range of wellness themes/interests – yoga, meditation, detox, fitness/boot camp, personal transformation, surfing, etc. More spas are promoting traditional Asian wellness modalities and programming, from Ayurvedic treatments to TCM, from chi gong to yoga and meditation, and from Tibetan medicine to Balinese healing. In countries such as Sri Lanka and India, a growing number of hotel/resort spas and traditional Ayurvedic resorts are transforming themselves into destination spas and wellness retreats that provide a holistic package of services, experiences, or journeys. The Carnoustie Group, known for its Ayurveda and wellness resorts in India, has announced plans to develop luxury wellness centers throughout China.

- The underlying demand for the Asian spa industry is driven by growing consumer interest in living healthier and more fulfilled lives, against the rise of chronic disease, stress levels, mental imbalance, and unhappiness. It is increasingly common for consumers to turn to body work to relieve stress and chronic pain, and to seek treatments that help maintain vitality and good health. Interest in yoga, meditation, and mind-body practices is on the rise across the region. In many Asian metropolises, spas have turned into urban sanctuaries where guests seek much more than just a facial or massage, but a full range of holistic wellness experiences. The need to inject wellness into ever busier lives has given rise to half-day and one-day urban retreat programs that combine a range of modalities (meditation, yoga, coaching/spiritual guidance, body work, hydrotherapy, sound healing, energy treatments, etc.). The Four Seasons in Hong Kong, for example, has created a "Masters of Wellness" program that allows guests to learn from top-notch visiting healers and wellness experts in various therapies and treatments.

- Asia has some of the fastest growing beauty markets in the world, and the spa industry reflects this consumer interest. Cosmoprof Asia, the premier beauty and spa event of Asia, grows every year in size and scope. Asian spas, focused on the beauty aspect of wellness, have expanded their services to meet a growing demand for cosmetic enhancements. Consumers from Korea to China to India are sophisticated in what they seek and expect results in their spa and beauty treatments. Less stringent industry regulation sometimes allows the region's spa industry to offer technology-enhanced treatments that may not be available in North America and Europe.

Thermal/Mineral Springs

- With its vast thermal resources and bathing traditions dating back more than a thousand years, Asia is home to the largest thermal/mineral springs markets in the world. Countries are recognizing the potential of springs for wellness tourism and economic development, and a growing number of destinations (including Japan, Taiwan, New Zealand, Australia, Vietnam, and Laos) are highlighting their hot springs attractions to international visitors.

- The Chinese hot spring sector, while enormous, mainly caters to domestic visitors. The industry comprises the remnants of historic Soviet-style sanatoria, rustic day-use hot springs/traditional bathhouses, and privately-owned and operated hot springs resorts and towns focused on recreation and family holidays. In order to raise standards and industry quality, China has established a national hot spring committee and regulations related to water quality, safety management, and the rating of "hot springs towns." Over the past five years, the industry has experienced strong growth, changing business models, and increased private investment, encouraged by rising consumer interest in healthy lifestyles and wellness tourism on the one hand, and government support for preventive health on the other hand. There are opportunities to upgrade existing facilities to world-class standards, and to integrate TCM with European-style hydro/balneotherapy to create Chinese-style hot spring wellness resorts. Some resorts also see potential for packaging employer-sponsored hot springs wellness holidays, developed as part of companies' employee wellness programs, which can create additional revenue for the sector (especially in the low seasons).

- While Japan's hot spring inns are gaining in popularity among international tourists, most of these properties continue to operate in their traditional style, without facility upgrades or modernization of offerings to cater to a rising clientele of international wellness tourists. Recently, the industry has received substantial new investments in preparation for a visitor surge for the 2020 Tokyo Olympics. These include new high-end bathing facilities and hotels/resorts with onsen in the center of Tokyo, and several large hotel brands such as InterContinental and Marriott opening new properties with their own private and communal hot springs. Elsewhere in East Asia, South Korea and Taiwan also have active hot springs sectors and traditions, evolving out of historical Japanese cultural influence. In recent years, Taiwan's hot springs sector has benefitted from aggressive tourism promotion to attract international visitors, families, wellness tourists, and even the MICE market. The sector is also actively linking hot springs to other types of tourism and interests. Taiwan hosts an annual Hot Spring & Fine Cuisine Festival, and a healthy hot spring cuisine concept has emerged focusing on locally-sourced fresh fish and vegetables. Hiking to one of Taiwan's more than 100 wild/undeveloped hot springs has also become a popular niche wellness tourism activity.

- Australia and New Zealand are leveraging their thermal resources aggressively for tourism promotion. The Peninsula Hot Springs in Australia is undergoing a significant expansion that will add overnight accommodations, new hot pools, ice cave/plunge pools, a group sauna area, an amphitheater, a "Food Bowl" that will promote organic produce, and expanded wellness programming. It is also working to create an official hot springs region near its location in Victoria. New Zealand is developing the city of Rotorua as a wellness destination focusing on its healing hot springs and mineral baths. The government is co-investing with private investors in a new hot spring facility (total investment US$21.5m) on the lakefront, with the aim of developing a world-class spa, a thermal, and wellness tourism district with linkages to the local Maori culture. Other thermal springs around the country (e.g., Te Aroha and Okoroire) are seeking investments to upgrade facilities and create new destinations for luxury and short-break tourism.

- South and Southeast Asian countries also have considerable thermal resources but are generally at earlier stages of development. In recent years, governments that have designated hot spring areas for tourism development include Thailand (Klong Thom as a pilot "spa city"), Cambodia (Kampong Speu province), and Laos (Hiem district hot springs in Huaphan province). India has hundreds of hot springs, many of which are located near temples with religious significance. In 2016, the State of Uttarakhand tourism department announced plans to develop the region as a thermal wellness destination, with world-class facilities to be built across five thermal sites (including spa complexes, golf courses, yoga and meditation centers, etc.). In Bhutan and Nepal, thermal springs traditionally have been used for medical and therapeutic purposes (rather than recreation), and they are therefore tied to the indigenous healing systems and spiritual heritage and remain rustic and undeveloped. There is an emerging interest in Nepal to further develop these resources into wellness tourism destinations by tying thermal bathing with yoga, Ayurveda, and even shamanism.

Europe Highlights (2017)

Wellness Real Estate

Wellness Real Estate Market:
$31.7 billion (4.5% CAGR from 2015-2017)

Wellness Lifestyle Real Estate (Residential) Project Pipeline:
61 projects

Workplace Wellness

Number of Workers with Access to Workplace Wellness Programs & Services:
101.3 million (25.0% of employed workers)

Expenditures on Workplace Wellness:
$17.7 billion (5.0% CAGR from 2015-2017)

Wellness Tourism

Number of Wellness Trips:
291.8 million (8.1% CAGR from 2015-2017)

Wellness Tourism Expenditures:
$210.8 billion (4.4% CAGR from 2015-2017)

Average Expenditure per Trip:
$1,209 for intl./inbound (65% premium);
$594 for domestic (105% premium)

Spas

Number of Spas:
46,282 (11.2% CAGR from 2015-2017)

Spa Revenues:
$33.3 billion (10.1% CAGR from 2015-2017)

Spa Employment:
883,352 (8.8% CAGR from 2015-2017)

Thermal/Mineral Springs

Number of Thermal/Mineral Springs Establishments:
5,967 (3.1% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Revenues:
$21.7 billion (4.9% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Employment:
438,424 (2.6% CAGR from 2015-2017)

Top Ten Wellness Real Estate Markets in Europe, 2017

	Market Size (US$ millions)
United Kingdom	$9,016.4
Germany	$6,439.9
France	$5,814.5
Netherlands	$1,850.5
Switzerland	$1,607.0
Norway	$1,216.7
Sweden	$1,139.9
Austria	$1,099.1
Italy	$1,001.0
Finland	$650.5

Source: Global Wellness Institute

Top Ten Workplace Wellness Markets in Europe, 2017

	# of Workers Covered (millions)	Expenditures (US$ millions)
Germany	18.6	$3,537.7
United Kingdom	14.5	$2,546.1
France	12.0	$2,275.3
Italy	9.3	$1,671.6
Spain	7.1	$1,357.9
Netherlands	3.8	$716.7
Sweden	2.6	$669.5
Switzerland	2.2	$429.4
Austria	2.1	$415.0
Belgium	2.1	$407.0

Source: Global Wellness Institute

Top Ten Wellness Tourism Markets in Europe, 2017

	Number of Trips (millions)	Receipts/Expenditures (US$ millions)
Germany	66.1	$65,746.3
France	32.4	$30,714.6
Austria	16.8	$16,509.8
United Kingdom	23.2	$13,478.1
Italy	13.1	$13,428.4
Switzerland	9.7	$12,571.3
Spain	18.8	$9,885.6
Turkey	9.1	$4,387.7
Russia	15.8	$3,997.4
Portugal	4.6	$3,405.2

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Source: Global Wellness Institute

Top Ten Spa Markets in Europe, 2017

	Number of Spas	Spa Revenues (US$ millions)	Spa Employment
Germany	7,060	$6,659.1	153,660
France	4,653	$3,588.9	88,709
Italy	3,954	$3,238.7	83,139
United Kingdom	3,547	$2,696.8	62,849
Spain	3,304	$2,459.2	58,532
Russia	3,446	$2,291.8	114,261
Austria	2,229	$2,054.4	48,674
Switzerland	978	$1,405.0	23,798
Poland	1,517	$752.0	23,689
Portugal	831	$716.3	14,835

Source: Global Wellness Institute

Top Ten Thermal/Mineral Springs Markets in Europe, 2017

	Number of Establishments	Revenues (US$ millions)
Germany	1,265	$7,151.9
Russia	838	$3,667.2
Italy	768	$1,718.3
Austria	181	$961.1
Hungary	546	$793.2
Spain	293	$683.1
Poland	203	$674.5
Turkey	295	$667.3
Czech Republic	131	$627.8
France	175	$627.7

Source: Global Wellness Institute

Europe Developments

Wellness Lifestyle Real Estate

- The United Kingdom has been a regional and global leader in this sector – less in terms of the number of projects, and more in terms of thoughtful and innovative planning and public policy approaches to improving built environments (the country's legacy in this space goes back the early/mid-20th century Garden Cities and New Towns movements). British developers and organizations have also been leading innovators in developing sustainable healthy communities (BioRegional and One Planet Living), integrating health services into community design (NHS England Healthy New Towns initiative; Llanelli Wellness Village in Wales), and in measuring the linkages between home/ community design and health/wellbeing/happiness.
- Outside the UK, the European project pipeline includes a variety of smaller-scale, experimental approaches focused on sustainable/regenerative living (e.g., ReGen Villages in Netherlands), healthy/sustainable urban development (e.g., Utrecht Healthy Urban Quarter/Wonderwoods in Netherlands, Muižas Nami in Latvia), and innovative human-centered architecture (e.g., Bjark Ingels' Mountain Dwellings and 8 House in Denmark, Bosco Verticale in Italy).
- Europe has long been a pioneer in innovative intentional living concepts that overlap with wellness lifestyle real estate, such as the cohousing communities that originated in Northern Europe in the 1960s. There is also opportunity for Europe's historic spa towns to redevelop and reposition themselves as healthy living communities (although to date the focus for these redevelopment projects has been on tourism and less on residents).
- There is a strong, longstanding focus in many European countries on supporting healthy/active and sustainable built environments in existing communities via public policy initiatives (such as the WHO European Healthy Cities network, launched in 1987) and infrastructure initiatives (such as efforts in Copenhagen and Amsterdam to build bicycle-friendly infrastructure since the 1970s).

Workplace Wellness

- Many European country governments, which fund and deliver the majority of healthcare to their citizens, have viewed workplace as an important sphere of public health where they can mitigate the rise of chronic disease. In recent years, a globalized 24/7 work culture, declining job and financial insecurity, and rise of loneliness have brought increased attention to issues of financial wellness, work-life balance, stress management, and mental health in the workplace. Since 1996, the European Commission has established a holistic framework to advance workplace health promotion. Governments are offering financial incentives to employers for workplace health promotion in many countries, including Germany, Austria, Ireland, Sweden, and Finland. In Scotland, a network of "healthy working lives" specialists makes free and confidential workplace visits to give advice on issues related to occupational health safety and wellbeing. Recently, a new labor agreement between employers and IG Metall (a union representing 900,000 metal and electrical workers) will permit workers to work less (28 hours instead of 35 hours per week) for lower pay, with the discretion to return to full time employment later. This agreement is expected to reverberate across Germany and Europe, signaling a new recognition by employers that workers today value their time and work-life balance more than wages alone.

Wellness Tourism

- Wellness tourism has deep roots in Europe. For centuries, people have traveled within the region to take advantage of hot springs, alpine air, sea breezes, slow food, and idyllic landscapes, in order to escape from everyday life and pursue recreation and healing. Europeans are sophisticated wellness consumers, based on longstanding cultural and historical traditions across the region, and this influences their propensity for wellness travel. In a Eurobarometer survey of 30,000 Europeans across 33 countries, 13% indicated that wellness/spa/health treatments were their primary or secondary motivation for going on holiday in 2015 (and the share of trips for which wellness was a primary motivation has doubled, from 3% in 2010 to 6% in 2015). In several countries, the propensity for primary-motivation wellness trips is very high, including Iceland (19% of survey respondents), Sweden (17%), Hungary (16%), Portugal and Slovakia (15%), and Czech Republic (10%).[40]

- Europe's wellness tourism industry continues to leverage its historic wellness assets, while upgrading its infrastructure (spas, wellness hotels, health resorts, etc.) and service offerings to attract the modern consumer. Throughout the region, governments and destinations are looking to wellness tourism to diversify their tourism sector, carve out a unique niche, reduce seasonality, combat over-tourism in some cases, and bring more benefits to their local communities and small businesses. For example, Russia's tourism plan for 2020 emphasizes the importance of enhancing spa and wellness sector quality and offerings to attract domestic and international wellness tourists. Italy recently launched Terme d'Italia, a project aimed at stimulating demand for spas and wellness resorts in eight regions. Azerbaijan, a relative newcomer that has received attention from the National Geographic Traveler Awards, is highlighting its thermal wealth and the unique quality of its mud to elevate its wellness tourism standing.

- In Central and Eastern Europe, wellness tourism is intrinsically linked to thermal resources and an extensive network of historic health resorts and sanatoria, where guests stay for doctor-supervised, water-based medical treatments, financed wholly or partially by national insurance systems. Many of these sanatoriums are now undergoing renovations, modernization, and wellness menu enhancements (mostly with private investment) in order to attract a younger clientele who are seeking wellness rather than medical treatments, and who are more likely to spend on room upgrades, add-on services, and a higher quality experience.

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[40] 1) European Commission (2016). *Preferences of Europeans towards Tourism.* Flash Eurobarometer Report No. 432. 2) European Commission (2011). *Survey on the attitudes of Europeans towards tourism.* Flash Eurobarometer Report No. 328. Both available at: https://ec.europa.eu/growth/tools-databases/vto/eurobarometer.

- The quest for differentiation and authenticity has led many industry players to refocus on their own traditions and wellness modalities in designing destinations and crafting guest experiences. Some look to their bathing traditions; for example, Finnish saunas, Austrian sauna aufguss, and Russia banya all offer distinctive experiences that combine wellness with rituals, community, fun, and entertainment, within a specific cultural context. With Scandinavians consistently ranking as the happiest people in the world, there is also surging interest in Nordic lifestyle concepts such as *hygge* ("cozy" for the Danish and Norwegians) and *lagom* ("balanced" or "just right" for the Swedish), which can be incorporated into facility design, guest experiences, wellness offerings, and marketing/promotion.

- Wellness trips and retreats that are built around a specific wellness activity are on the rise, from boot camps to meditation and silence retreats. There is more demand to combine activities in nature with wellness modalities, such as hiking to a scenic location for meditation, or yoga and tai chi in an outdoor setting. Short-haul, weekend getaways continue to grow – not only for couples and girlfriends, but increasingly for families (including multi-generations) – and destinations are modifying their amenities and programming to accommodate this trend.

Spas

- Across the region, the spa market has been growing at a steady pace alongside stable economic growth and rising consumer interest in services and activities that align with their wellness lifestyle. Spa offerings are proliferating to provide novelty, diversity, and choices to customers. Some spas are expanding along a full range of holistic health and preventive services that extend to nutritional advice, sleep therapy, sound therapy, gut microbe analysis, energy healing, and so forth. Others are adopting wellness and healing modalities from different traditions and cultures: Finnish saunas, Japanese onsens, Turkish hammams, Traditional Chinese Medicine, and Ayurveda are no longer confined to their country or region of origin, or to niche spas. At the same time, establishments that provide a single, specialized wellness service/treatment also continue to grow, from beauty treatments, massage, and reflexology, to reiki, flotation tanks, cryotherapy, salt caves, etc., competing with similar offerings at conventional full-service day spas and hotel/resort spas.

- Spas are also responding to a rising need for mental wellness and stress reduction, along with growing interest in igniting and supporting behavioral change that will lead to a more healthful, balanced, and fulfilled life for guests outside of the spa. To complement body/energy work, many spas are beginning to offer more personalized and tailored services, such as nutritional assessments, individual counseling/advice, holistic personal wellness plans, coaching, etc. Overall, there is a gradual shift and expansion in offerings, as more spas recognize that they are no longer operating within the confines of the spa sector but competing in a much broader and quickly evolving landscape of the wellness industry.

- Consumer adoption and understanding of wellness is quickly evolving, and many spas are undergoing redesign/refurbishments of their facilities and offerings, reflecting emerging needs and preferences, such as: the desire for community (e.g., creating club-like settings and atmospheres, or group programs and classes that facilitate connections among guests); intergenerational wellness experiences (e.g., "better-aging" modalities; kids/teen spa treatments, classes, and activities); water for healing (e.g., hydrotherapy, watsu, therapeutic thermal/mineral spring bathing and treatments); and using nature to enhance our sense of wellbeing (e.g., forest bathing; use of natural, organic, and local ingredients; biophilic design of facilities).

Thermal/Mineral Springs

- Thermal and mineral springs have been a part of wellness rituals in many European countries for centuries, and they are intrinsically linked to the strong bathing culture and tradition across the continent. Natural therapies related to water are as extensive as they are varied: balneotherapy, thalassotherapy, mud, salts, algae, etc.
- European countries that have a large sector of sanatoria-style health resorts catering to government-funded patients are looking to upgrade, privatize, and diversify many of these establishments. Investments are being made in thermal resorts and spas all over Europe, some in major expansions of well-established assets – for example, the addition of a subterranean spa, a Retreat Lagoon, hotel, and restaurant at the renowned Blue Lagoon in Iceland. Some investments aim to introduce cross-cultural bathing experience, such as introducing Japanese-style onsens or Turkish baths to European bathers at existing or new thermal resorts. Many facilities receive new investments to add spa and complementary wellness services, facilities, and programming that will appear to a broader range of guests, such as health food restaurants, beauty treatments, fitness studios, and mind-body classes.
- With the rise of wellness and wellness tourism, thermal/mineral springs across Europe are viewed as a vital resource for tourism and economic development. Many new investments and marketing initiatives have been launched in recent years, from "the Year of Healthy Waters" promotion in Slovenia, to a Spain-Portugal partnership to jointly promote thermal establishments along their border. "Roman Thermal Spas of Europe" is a multi-country (Greece, Germany, Hungary, Portugal, France, and Bulgaria) partnership to develop and promote thermal tourism packages involving spas and health resorts with a Roman origin. Greece and Turkey, among other countries, have placed hot springs at the center of their tourism promotion themes, seeking investments to modernize and upgrade thermal offerings.

North America Highlights (2017)

Wellness Real Estate

Wellness Real Estate Market:
$54.8 billion (7.9% CAGR from 2015-2017)

Wellness Lifestyle Real Estate (Residential) Project Pipeline:
372 projects

Workplace Wellness

Number of Workers with Access to Workplace Wellness Programs & Services:
93.9 million (53.8% of employed workers)

Expenditures on Workplace Wellness:
$17.6 billion (4.2% CAGR from 2015-2017)

Wellness Tourism

Number of Wellness Trips:
204.1 million (4.6% CAGR from 2015-2017)

Wellness Tourism Expenditures:
$241.7 billion (5.8% CAGR from 2015-2017)

Average Expenditure per Trip:
$3,285 for intl./inbound (44% premium);
$1,058 for domestic (57% premium)

Spas

Number of Spas:
30,394 (3.6% CAGR from 2015-2017)

Spa Revenues:
$22.9 billion (5.5% CAGR from 2015-2017)

Spa Employment:
443,419 (2.2% CAGR from 2015-2017)

Thermal/Mineral Springs

Number of Thermal/Mineral Springs Establishments:
302 (12.9% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Revenues:
$0.7 billion (12.6% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Employment:
10,660 (12.3% CAGR from 2015-2017)

Wellness Real Estate Markets in North America, 2017

	Market Size (US$ millions)
United States	$52,481.2
Canada	$2,355.1

Source: Global Wellness Institute

Workplace Wellness in North America, 2017

	# of Workers Covered (millions)	Expenditures (US$ millions)
United States	83.8	$15,678.8
Canada	10.0	$1,876.6

Source: Global Wellness Institute

Wellness Tourism Markets in North America, 2017

	Number of Trips (millions)	Receipts/Expenditures (US$ millions)
United States	176.5	$226,017.7
Canada	27.5	$15,652.6

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Source: Global Wellness Institute

Spa Markets in North America, 2017

	Number of Spas	Spa Revenues (US$ millions)	Spa Employment
United States	26,317	$20,830.2	395,707
Canada	4,077	$2,054.9	47,712

Source: Global Wellness Institute

Thermal/Mineral Springs Markets in North America, 2017

	Number of Establishments	Revenues (US$ millions)
United States	280	$631.0
Canada	22	$97.1

Source: Global Wellness Institute

North America Developments

Wellness Lifestyle Real Estate

- The United States leads the world in wellness lifestyle real estate development, accounting for almost half the projects in the global pipeline. Since the 1990s, experimental and innovative wellness community projects have been pioneered across different parts of the country. In the last decade, projects have rapidly proliferated in the Sun Belt states (Arizona, Texas, Florida, South Carolina, Georgia, etc.), where wellness-focused design, facilities, and amenities have become a differentiating selling point for large-scale master-planned communities and urban/suburban mixed-use projects.
- The United States originated the concept of “agrihoods,” i.e., planned communities built around farms. It has also been a leader in experimenting with new urban design and planning concepts (New Urbanism); launching wellness-related residential/community certification schemes (WELL™, Fitwel™, Living Communities, etc.); innovating new senior living concepts; and bringing healthy/active design into affordable housing (through the Center for Active Design, Fannie Mae Healthy Housing Rewards™ program, and a variety of municipal housing authorities).

Workplace Wellness

- The United States is the largest workplace wellness market in the world because employers are conscious of both productivity and healthcare costs. But, the conventional preventive measures and focus on physical health are becoming a thing of the past. A recently released book by Stanford Business School professor Jeffrey Pfeffer claims that workplace-related stress – a combination of long or unpredictable hours, high job demands, low autonomy, and a lack of health insurance – is responsible for more than 120,000 deaths a year and roughly 5-8% of annual healthcare costs in the United States.[41]
- In recent years, workplace wellness conversations have been shifting from health checkups, ergonomic furniture, free gym memberships, and other preventive health offerings toward broader issues of stress management and maximizing engagement, joy, and flow at work. More employers are now focused on creating a culture of health and wellbeing, incorporating features such as a healthy workplace design, less hierarchical organization and management, flexible and remote work, expanded vacation time and personal leave, minimum pay increases, and company-sponsored community service, with the aim of improving employees’ engagement, work-life balance, and overall satisfaction and happiness at work. Successful programs focus on tailoring wellness offerings to meet employees’ specific workplace challenges and needs. The most vocal proponent of this shift is the Millennial generation, which has embraced an array of health and fitness apps and wearable technologies. Some of the key shifts identified by the Global Wellness Institute’s Wellness At Work Initiative include: purpose-driven organizations, women-friendly workplaces, deep inclusivity, the power of teams, mental wellbeing, and biophilic design.[42]

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[41] Pfeffer, J. (2018). *Dying for a Paycheck.* New York, NY: Harper Collins.

[42] Moorefield, R. (2018). *Ten Shifts Driving a New ‘Thrive’ Revolution at Work.* Miami, FL: Global Wellness Institute. https://globalwellnessinstitute.org/wp-content/uploads/2018/06/WorkplaceWellnessTrends_April2018.pdf.

Wellness Tourism

- The rise of wellness travel is driving new positioning and promotion strategies in North America's hospitality industry. Industry leaders recognize the growing demand for wellness, not just at destination getaways but also in urban locations. Companies such as Canyon Ranch and Six Senses are expanding from their base of destination resorts into major U.S. metropolitan areas (e.g., Six Senses announced that their first North American property will be a luxury urban hotel adjacent to Manhattan's popular High Line). Luxury brands such as Four Seasons, Ritz-Carlton, and Mandarin Oriental have created wellness programs and health and fitness offerings that rival the top destination spa resorts. Mandarin Oriental hotels, for example, have on-site wellness professionals who offer customized Pilates, yoga, meditation, and tai chi classes. Meanwhile, numerous brands are rolling out new wellness initiatives to appeal to the growing number of business and leisure travelers who value healthy food, fitness, and mind-body balance. Leisure hotels aggressively market wellness weekends and rejuvenation retreats, and they promote their wellness offerings and environments as distinguishing characteristics. Business hotels address the time constraints of their guests by providing options such as shorter massages or in-room fitness equipment. Hilton, for example, launched "Five Feet to Fitness," which provides more than 11 different equipment and accessory options to guests in premium fitness rooms (which cost $45 more than a standard room).

- Many hotel chains have developed partnerships with recognized wellness industry leaders to increase flexibility and offer expanded services/programming to guests. These partnerships can range from streaming content (e.g., Pilates, yoga, meditation) to providing interactive fitness equipment (e.g., Peloton). Examples of partnerships between major brands include: Shangri-La and Lululemon; Mandarin Oriental Hotels and the Mayo Clinic; Park Hyatt Hotels and MNDFL Meditation; Fairmont Hotels and Technogym; and Wyndham Hotels and Resorts with Stay Wellä/Delos. For urban hotels where space is more challenging, some brands have formed partnerships with local boutique exercise studios, massage therapists, and spas to package offerings close to their properties.

- Airports and airlines continue to step up their wellness amenities to target secondary wellness travelers (i.e., those who want to maintain wellness during travel). Airport spas – in small kiosks and stores within terminals, as well as in airline first-class lounges – have proliferated in North American airports. Offerings can range from saunas, massages, manicures, pedicures, and haircuts to oxygen therapy, cryotherapy, guided meditation, and VR-assisted relaxation. While airline lounges are generally reserved for first- and business-class passengers or club members, many airlines sell spa access for a daily or half-day fee. Wellness services are also extended in other ways. American Express partners with Exhale to offer spa services at airport lounges. Delta has employee-only spas at several airports. Canyon Ranch is partnering with Singapore Airlines to step-up wellness amenities for passengers on ultra-long-haul flights. Additional airport wellness offerings on the rise include: "silent airports," yoga rooms, in-transit fitness clubs, therapy dogs, napping pods and suites, treadmill desks, and designated terminal walking circuits.

Spas

- The spa industry has enjoyed steady growth in North America, driven by a steady economy and rising consumer spending on all things related to wellness. Growth has been led by hotel/resort spas as well as medical spas. A 2017 ISPA survey reported that 42% of hotel/resort sector respondents cite “wellness, health and fitness” as the top trend affecting the spa industry.[43] Luxury branded hotels (e.g., Four Seasons, Fairmont, Ritz-Carlton, etc.) increasingly use their spas and wellness programs as a marketing tool for hotel guests and to generate revenue from non-guest customers. Some hotels have begun charging a general “resort fee” whether guests use the wellness amenities or not.

- Medical spas are enjoying rising demand, reflecting increased consumer interest in self-care, maintenance, anti-aging, and beauty. While the majority of customers are women between the ages of 35-54, there is also rising interest from men and under-35 customers. According to the American Med Spa Association, in recent years there is a pronounced increase in demand for less invasive treatments such as injectables, chemical peels, and non-surgical skin tightening, in addition to body sculpting and tattoo removal. Many medical spas are investing in a more spa-like and less clinical/medical environments and atmospheres for their customers. Capitalizing on rising demand and the success of single service models such as Drybar (for blowouts), Alchemy 43 has attracted seed funding to launch a series of locations that focus on Botox and fillers in a spa/salon-like setting in major cities.

- Franchises such as Massage Envy, Elements Massage, Massage Heights, and Hand & Stone continued to grow from 2015-2017, particularly in the suburbs and secondary city markets, but at a slower rate as compared to the previous two years. This leveling of growth is probably attributed to a maturing market, cost pressures, and aggressive discounting and competition from small, single-service establishments (e.g., reflexology centers, Thai massage clinics, etc.). GWI estimates that there were about 2,500 franchised spas in the United States in 2017, up from about 1,500 locations just five years earlier in 2012.[44]

- Zeel, a pioneer in the model of massage-on-demand, has expanded to more than 75 U.S. cities, and has launched a new platform that places licensed massage therapists on-demand at hundreds of spas, salons, and hotel partners, to help manage staffing and demand surges. Meanwhile, Soothe – a newcomer to massage-on-demand – recently raised $31 million in new capital to fund expansion in the U.S. market and to launch new services in the UK and Australia. Similar on-demand and app-based services are also proliferating in the salon and beauty sector, with the growth of companies such as Glamsquad, BeGlammed, TheGlamApp, and BeautyLynk.

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[43] International SPA Association (2017). *2017 U.S. Spa Industry Study*. Lexington, KY: International SPA Association.

[44] Global Wellness Institute analysis of data from Entrepreneur.com.

Thermal/Mineral Springs

- The majority of thermal/mineral springs are located in the Western and Southwestern United States and Western Canada, and these establishments tend to be fairly rustic bathing- and swimming-focused facilities. The thermal/mineral springs sector is quite underdeveloped in North America as compared to other wellness sectors, mainly because North Americans have not developed the type of bathing culture prevalent in much of Europe and East Asia. But that is changing, with a rising interest in and visitation to springs due to a confluence of consumer values and lifestyle preferences. Overall, more people are looking to nature and its power to calm and rejuvenate. Across North America and especially in Canada, consumers are discovering the healing powers of water, from Nordic spa circuits to hydrotherapy. Finally, the rise of loneliness has created awareness of the value of "third places" – social environments outside of home and work, where people can find community with one another. These trends, and the accessibility and affordability of visiting hot springs, are expected to drive the growth of the springs sector over the next decade.

- Business owners and investors are taking note of these trends and are renovating, expanding, and reopening historic hot springs facilities in many locations across the United States. Multi-million dollar expansions continue at California's iconic Two Bunch Palms and Glen Ivy Hot Springs. Several new facilities and reopenings of shuttered properties are slated over the next few years in Arizona, Wyoming, Montana, and California, while longer-term thermal spring redevelopment projects are in the works from California to Texas to South Dakota.

Latin America-Caribbean Highlights (2017)

Wellness Real Estate

Wellness Real Estate Market:
$0.4 billion (2.1% CAGR from 2015-2017)

Wellness Lifestyle Real Estate (Residential) Project Pipeline:
12 projects

Workplace Wellness

Number of Workers with Access to Workplace Wellness Programs & Services:
14.3 million (5.0% of employed workers)

Expenditures on Workplace Wellness:
$1.3 billion (3.4% CAGR from 2015-2017)

Wellness Tourism

Number of Wellness Trips:
59.1 million (12.4% CAGR from 2015-2017)

Wellness Tourism Expenditures:
$34.8 billion (7.0% CAGR from 2015-2017)

Average Expenditure per Trip:
$1,067 for intl./inbound (31% premium);
$380 for domestic (26% premium)

Spas

Number of Spas:
13,856 (16.2% CAGR from 2015-2017)

Spa Revenues:
$6.6 billion (15.9% CAGR from 2015-2017)

Spa Employment:
215,898 (14.4% CAGR from 2015-2017)

Thermal/Mineral Springs

Number of Thermal/Mineral Springs Establishments:
1,406 (10.7% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Revenues:
$1.6 billion (15.4% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Employment:
57,576 (15.0% CAGR from 2015-2017)

Top Five Wellness Real Estate Markets in Latin America-Caribbean, 2017

	Market Size (US$ millions)
Mexico	$290.3
Brazil	$38.0
Costa Rica	$16.6
Argentina	$12.3
Chile	$7.6

Source: Global Wellness Institute

Top Ten Workplace Wellness Markets in Latin America-Caribbean, 2017

	# of Workers Covered (millions)	Expenditures (US$ millions)
Brazil	4.0	$341.5
Mexico	2.4	$223.8
Argentina	1.3	$114.1
Colombia	1.0	$89.3
Peru	1.0	$87.4
Venezuela	0.9	$71.4
Chile	0.6	$54.9
Ecuador	0.4	$33.4
Guatemala	0.4	$30.9
Costa Rica	0.3	$30.7

Source: Global Wellness Institute

Top Ten Wellness Tourism Markets in Latin America-Caribbean, 2017

	Number of Trips (millions)	Receipts/Expenditures (US$ millions)
Mexico	18.7	$12,845.0
Brazil	10.5	$4,068.9
Chile	7.9	$2,223.5
Argentina	4.3	$2,112.4
Dominican Republic	1.0	$1,352.6
Costa Rica	1.0	$1,350.0
Peru	2.3	$1,262.9
Ecuador	1.0	$1,059.6
Colombia	1.9	$984.9
Jamaica	0.7	$739.0

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Source: Global Wellness Institute

Top Ten Spa Markets in Latin America-Caribbean, 2017

	Number of Spas	Spa Revenues (US$ millions)	Spa Employment
Mexico	3,837	$1,772.8	61,718
Brazil	2,211	$813.2	31,043
Argentina	2,413	$778.7	31,092
Costa Rica	357	$398.8	9,491
Colombia	829	$332.6	12,800
Chile	517	$240.1	7,412
Peru	328	$219.5	5,949
Ecuador	288	$213.8	5,465
Dominican Republic	311	$162.0	4,899
Uruguay	169	$134.5	2,781

Source: Global Wellness Institute

Top Ten Thermal/Mineral Springs Markets in Latin America-Caribbean, 2017

	Number of Establishments	Revenues (US$ millions)
Brazil	207	$718.0
Argentina	179	$251.3
Mexico	587	$216.0
Costa Rica	45	$140.2
Chile	78	$87.1
Uruguay	32	$68.4
Peru	44	$39.8
Ecuador	50	$22.8
Colombia	52	$21.1
Guatemala	18	$8.3

Source: Global Wellness Institute

Latin America-Caribbean Developments

Wellness Lifestyle Real Estate

- The wellness lifestyle real estate market is nascent in Latin America. There are a handful of resort-based wellness living projects in Mexico and Costa Rica (mostly still in the development phase). In Bogota, Colombia, former mayor Enrique Peñalosa has been widely lauded for his efforts to transform the city's infrastructure and policy environment to make residents happier. In response to rapid urbanization and sprawl, there is also growing attention on healthy built environments at the public policy and research level in countries across the continent.

Workplace Wellness

- Workplace wellness is not a common concept in Latin America and the Caribbean – typically extending only to those working for large or multinational corporations in countries such as Brazil, Argentina, Chile, and Mexico – and programs are much less robust than those offered by comparably sized companies in the United States and Europe. A significant number of employers continue to view workplace wellness as synonymous with medical insurance and sick leave; however, a recent study by MetLife suggested a growing level of interest among employers in offering wellness benefits as part of their recruitment and staff retention strategy, as well as to reign in rising health insurance costs.[45] Meanwhile, the wellness priorities for workers in the agricultural, manufacturing, and informal sectors across Latin America are mainly in the spheres of working conditions and fair labor practices.

Wellness Tourism

- There is strong momentum to develop wellness tourism in Latin America and the Caribbean based on the region's diverse natural and cultural assets, alongside the motivations of key visitor segments: rest and relaxation; experiencing nature, biodiversity, adventure, active vacations, and ecotourism; and beauty and medical tourism. Many countries are discovering the potential of promoting thermal/mineral springs in conjunction with wellness tourism. Overall, we observe destinations adopting different strategies and positioning based on their unique assets and advantages. Caribbean tourism and destination marketing organizations are working to promote the region as a wellness destination by adopting spa facility standards, training personnel, and creating a wellness tourism identity. Nonetheless, the promotion of wellness tourism in the region will continue to be affected by various natural and human-made events and issues, such as hurricanes, earthquakes, safety, and travel warnings.

- To appeal to visitors who are already familiar with spas and R&R offerings, many destinations (e.g., Mexico and several Caribbean countries) are upgrading their spas and reorienting their programming and positioning from luxury and pampering to active lifestyle and holistic wellness. These initiatives include building new wellness resorts/retreats, as well as developing rigorous programs and offerings of holistic wellness that focus on prevention and human performance, integrative medicine, and indigenous healing modalities.

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[45] MetLife (2013). *Latin America Employee Benefits Trends Study,* https://benefittrends.metlife.com/global-perspectives/a-latin-american-perspective/.

- In countries with advanced medical and esthetic markets, the promotion of wellness tourism often builds off of strengths in beauty enhancement treatments (e.g., Argentina, Brazil), strong medicine and surgery sectors (e.g., Mexico, Cuba, Colombia), and the therapeutic properties of thermal/mineral waters (e.g., Ecuador). These nations' clinics and hospitals are partnering with resorts and hotels to create facilities that have the same attributes as U.S. medical spas.
- Countries such as Costa Rica and Belize are well-established eco-tourism destinations that have pioneered concepts such as jungle/eco-spas. Visitors who are interested in nature and biodiversity are already taking advantage of offerings such as coffee scrubs and volcanic mud wraps, or doing yoga and meditation retreats against a backdrop of pristine nature and diverse wildlife. Costa Rica has the ambition of branding its country as not only a wellness destination, but as a country of wellness, with special attention to the wellbeing of the people and the protection of its natural environment and cultural heritage. It has recently expanded its national promotional slogan from "Pura Vida" to "Wellness Pura Vida," and it is working on a long-term strategy to develop seven areas of the country around their unique wellness tourism assets.

Spas

- The spa market in Latin American and the Caribbean is robust, reflecting strong tourism arrivals, steady economic growth, and rising interest in wellness among both residents and visitors. Hotel and resort developments have been especially strong in popular destinations (e.g., Mexico, Costa Rica, Colombia, Brazil, Belize, St. Kitts, etc.), and spas are nearly ubiquitous, as guests have come to expect spa services in resorts and city hotels alike. Many resort hotels are transforming their spas and expanding their offerings to meet the growing demand for more holistic wellness services, therapies, and programming that target prevention rather than pampering (e.g., hydrotherapy, circuit training, tai chi, meditation, etc.). Some are drawing inspiration from indigenous healing modalities (e.g., Mexican sweat lodges or temazcals) to create new experiences for guests interested in authenticity and local cultures.
- The region's spa sector has a strong association with beauty and slimming. Beyond spas catering to tourists, there is a robust market for esthetic and body treatments for a growing middle class, marked by the arrival of chains/franchises and the proliferation of massage clinics and esthetic salons in major urban areas (especially in Mexico and Brazil). Product companies are leveraging the region's biodiversity and local ingredients to create treatments tailored to specific health, wellness, beauty, and anti-aging needs. In particular, Jamaica, Nicaragua, Costa Rica, and Mexico are encouraging the promotion of locally made skincare products and native-based treatments in their spa industry.

Thermal/Mineral Springs

- Latin America and the Caribbean hosts extensive thermal/mineral water resources that extend from the Sierra Madre mountains in Central America to the Guaraní Aquifer in the Southern Cone. The region's rich natural offerings (biodiversity, beaches/coastlines, jungles and forests, wildlife, etc.), combined with its history and culture, offers tremendous opportunities for differentiation and unique positioning. However, today most facilities are traditional/rustic bathing and swimming establishments (e.g., *balnearios* and *baños termales*) or modern/themed waterparks primarily used by residents and regional tourists for recreation. Countries in the region are in various stages of development to exploit new opportunities in this sector.

- Brazil has the largest and most developed thermal tourism sector in the region, with several major spa towns/regions hosting dozens of large-scale recreational resorts and waterparks. There are many major investments and new projects in the pipeline. In the Olimpia region, the $29 million Hot Beach waterpark and resort opened in 2017. The Foz de Ignaçu region is investing heavily in its facilities, including development of the new Foz de Ignaçu Blue Park (the world's largest artificial thermal beach when completed, and inspired by Orlando theme parks) and a $242 million expansion of its flagship Itaipuland thermal park (adding 2,500 timeshare apartments and an entertainment/hospitality complex). Other major developments include the Gramado Termas Resort (Brazil's first indoor thermal waterpark, with timeshare apartments), as well as new ancillary attractions in the Rio Quente Hot Park (rafting, archery, zipline, and a 1,200-person concert/event center).

- Nicaragua, Ecuador, and Colombia have recently begun to explore and develop their natural springs, through site surveys and inventories, feasibility studies, and private-public partnerships. Other countries such as Jamaica and Mexico have made aggressive investments to upgrade hospitality infrastructure and complementary wellness services around the springs in order to target international tourists. In Argentina, where thermal springs are promoted by many provinces but lacking in basic tourism infrastructure, the government is conducting assessments to determine how to standardize and improve quality and services. The Uruguayan government has made the thermal sector a major tourism development priority, investing in a cluster of six hot springs on its western coast and opening a new 4-star resort, Salinas del Almiron in 2016. Costa Rica, with its well-developed eco/nature tourism clientele, is working to heighten the quality and diversity of its offerings with new investments in hot spring parks and hotels.

- Some countries focus on the therapeutic benefits of thermal springs as a healthcare and medical tourism resource. The Chilean government, for example, subsidizes older citizens to visit hot springs for rest and recuperation. Guatemala has many medical thermal spas and medical centers that offer rehabilitation, nutrition services as well as yoga. Its tourism promotion emphasizes the use of hot spring and mineral treatments in combination with the latest medical technology. Similarly, Cuba emphasizes the medicinal properties of its historic thermal/mineral springs and baths as it promotes itself as a medical travel destination.

Middle East-North Africa Highlights (2017)

Wellness Real Estate

Wellness Real Estate Market:
$0.5 billion (5.2% CAGR from 2015-2017)

Wellness Lifestyle Real Estate (Residential) Project Pipeline:
5 projects

Workplace Wellness

Number of Workers with Access to Workplace Wellness Programs & Services:
10.2 million (7.6% of employed workers)

Expenditures on Workplace Wellness:
$1.3 billion (7.4% CAGR from 2015-2017)

Wellness Tourism

Number of Wellness Trips:
11.0 million (13.4% CAGR from 2015-2017)

Wellness Tourism Expenditures:
$10.7 billion (13.3% CAGR from 2015-2017)

Average Expenditure per Trip:
$1,305 for intl./inbound (44% premium);
$599 for domestic (65% premium)

Spas

Number of Spas:
6,057 (16.5% CAGR from 2015-2017)

Spa Revenues:
$0.4 billion (30.4% CAGR from 2015-2017)

Spa Employment:
86,990 (16.6% CAGR from 2015-2017)

Thermal/Mineral Springs

Number of Thermal/Mineral Springs Establishments:
416 (13.3% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Revenues:
$0.4 billion (30.4% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Employment:
20,324 (16.3% CAGR from 2015-2017)

Top Five Wellness Real Estate Markets in Middle East-North Africa, 2017

	Market Size (US$ millions)
United Arab Emirates	$446.3
Saudi Arabia	$31.9
Israel	$12.4
Qatar	$11.5
Oman	$3.9

Source: Global Wellness Institute

Top Five Workplace Wellness Markets in Middle East-North Africa, 2017

	# of Workers Covered (millions)	Expenditures (US$ millions)
United Arab Emirates	2.1	$342.8
Saudi Arabia	2.5	$286.0
Israel	0.8	$140.1
Oman	0.5	$89.0
Kuwait	0.5	$84.2

Source: Global Wellness Institute

Top Ten Wellness Tourism Markets in Middle East-North Africa, 2017

	Number of Trips (millions)	Receipts/Expenditures (US$ millions)
United Arab Emirates	1.8	$3,750.0
Morocco	2.8	$1,717.8
Israel	0.9	$1,131.3
Jordan	0.5	$604.3
Bahrain	0.3	$563.8
Saudi Arabia	0.7	$492.2
Oman	0.4	$473.5
Egypt	1.2	$427.3
Iran	0.6	$388.5
Tunisia	0.6	$313.8

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Source: Global Wellness Institute

Top Ten Spa Markets in Middle East-North Africa, 2017

	Number of Spas	Spa Revenues (US$ millions)	Spa Employment
United Arab Emirates	933	$873.1	25,569
Saudi Arabia	510	$347.3	9,298
Morocco	2,107	$294.8	17,366
Israel	520	$281.8	7,424
Bahrain	129	$178.1	2,894
Kuwait	136	$135.0	2,867
Qatar	103	$126.8	2,226
Egypt	608	$125.4	5,399
Oman	105	$125.3	2,237
Tunisia	303	$117.5	4,335

Source: Global Wellness Institute

Top Five Thermal/Mineral Springs Markets in Middle East-North Africa, 2017

	Number of Establishments	Revenues (US$ millions)
Tunisia	126	$189.8
Israel	6	$66.5
Algeria	181	$45.4
Iran	46	$34.3
Morocco	18	$29.6

Source: Global Wellness Institute

Middle East-North Africa Developments

Wellness Lifestyle Real Estate

- The wellness lifestyle real estate market in the Middle East is nascent, with a handful of projects in Dubai that are linked to the large-scale Dubai Healthcare City and Dubai Sustainable City initiatives. However, there is significant and growing interest in health/wellness as a differentiating feature in the region's competitive real estate market, and we expect to see a number of new projects in the coming years at the luxury end of the market, including multi-family housing, urban mixed-use developments, and resort-based wellness residences. These projects are also more likely to seek out international wellness certifications/ratings. Dubai has recently been focusing on quality of life and happiness of its citizens via the Dubai Happiness Agenda, but these efforts are primarily focused on public policy and smart city infrastructure rather than purpose-built real estate.

Workplace Wellness

- Even with the growing concerns about obesity, chronic disease, and rising stress as a negative health factor in many countries, workplace wellness is still a relatively uncommon concept among the region's employers and employees. The market for workplace wellness is the most active in the UAE, where there is a high concentration of multinational companies, expatriate professionals, and knowledge workers, who expect human resource and company practices to be more aligned with those in North American and Europe. Outside the professional, technology, and knowledge sectors, workplace wellness concerns are less about fitness, eating habits, or stress, and are primarily focused on the treatment and working conditions of guest workers, many of whom work in the construction, transportation, and service sectors.

Wellness Tourism

- Several Middle East and North Africa region countries prominently promote wellness tourism on their national tourism websites, but many focus exclusively on spas (e.g., Dubai, Abu Dhabi, Qatar, Morocco, and Egypt). Tunisia and Algeria tend to highlight their traditional thermal offerings, while Jordan promotes a diverse wellness tourism experience that extends from natural healing around the Dead Sea, to spas and meditation tourism. Israel has leveraged the therapeutic properties of the Dead Sea for wellness tourism as well as promoting skincare/cosmetic products. However, thousands of sinkholes have closed down beaches, damaged resorts, and halted developments, highlighting the conflict between fragile natural resources and the tourism and economic development that depends on them.

- Many regions within Egypt are historically famous for therapeutic tourism anchored on unique natural features, e.g., the black sands of the Safaga/Red Sea region, the sand baths and hot springs in the Siwa Oasis, and sulfur springs in Helwan. These regions currently receive local and regional tourists, and their offerings tend to be European-style natural resource-based therapies that occupy the grey area between wellness and medical tourism. National and regional government authorities (including Ministries of Environment and Health) have recently started to redevelop and promote these regions, and they are seeking investments to build new therapeutic and wellness resorts.

- While wellness tourism in the Gulf region continues to be dominated by secondary wellness travelers – those who have come to expect extensive spa and fitness facilities in both city and resort hotels when they travel – the region is starting to develop offerings that cater to primary wellness travelers. The Gulf's first holistic wellness retreat/destination spa opened at the Retreat Palm Dubai in 2017, and the integrative Zalal Wellness Destination Retreat is currently under construction in Qatar. The healthy hotel concept is also growing in the region. The Al Shaqab healthy/active lifestyle concept hotel opened in Qatar's Education City in 2016. In Dubai, Smartotels is launching its FORM Hotel concept in 2018, focused on wellbeing, lifestyle, and technology-driven and socially-responsible design.

- Several Gulf country governments (e.g., Bahrain, Kuwait, Saudi Arabia) are looking to tourism for economic diversification strategy and investing in large-scale resort spa developments. They often use "health tourism" as an umbrella term to capture both wellness tourism and medical tourism, which they are also targeting. Some countries are spending billions of dollars to build large-scale mixed-use projects that combine residential, tourism/hospitality, commercial, and health/medical components, aiming to promote tourism and economic development while encouraging healthy lifestyles among the local population. Most of these projects include green/sustainable building, outdoor and fitness amenities, world-class medical services, alternative/complementary wellness services, and other offerings for residents and visitors. Examples include the Dubai Healthcare City/WorldCare Wellness Village in UAE; the Dilmunia Island project in Bahrain; the Kuwait Silk City project, and the Qatar Foundation Stadium and Health & Wellness Precinct/Education City project.

Spas

- The Gulf region has long had a reputation for leisure, shopping, and beach tourism, and the spa sector may be finally catching up with its highly developed hospitality industry. Hotels continue to be built at a rapid pace, and spas are now seen as integral/central part of hotels from the mid-price ranges and up. In particular, the UAE and Qatar have benefitted from significant investments in new hotels and resort properties in preparation for Expo 2020 and the FIFA World Cup 2022. A number of high-end spas have been planned or opened recently in new hotels and resorts, and as part of entertainment/retail complexes in Doha and UAE. Across the Middle East and North Africa, a rising consumer preference for healthy lifestyles has increased demand for wellness services, especially in spa and fitness. Saudi Arabia is often regarded as a high-potential market with its rapidly growing population, rising incomes, and a growing chronic disease epidemic.

- Spas in the region have long been associated with beauty and pampering. The UAE continues to be the region's largest spa market, with its cosmopolitan residents increasingly adopting health and wellness lifestyles that include spa-going, fitness, and healthy eating. The market serves a diverse customer base, including middle/professional-class expatriates, wealthy Emiratis, and European tourists who expect high quality services. Increasing demand for spa/wellness services and programming has driven growth in hotel and resort spas, as well as international brands, chains, and franchises, enhancing treatment offerings at a variety of price points. Competition is especially tough in the day spa market, where new entrants and aggressive promotion and discounting have created intense price pressures for many businesses.

Thermal/Mineral Springs

- Tunisia and Algeria have the region's most established thermal bathing and thalassotherapy sectors, rooted in the French tradition of "thermalisme." In recent years, many formerly medical-oriented thermal centers have been adding complementary spa treatments, recreational options, lodging, and other offerings to attract wellness tourists. Governments in both countries have long supported the therapeutic and medical use of thermal/mineral/sea waters, and both countries have national tourism strategies that leverage thermal resources for diversification and growth. Several major projects are underway throughout Tunisia, where there are plans to privatize some of the historic thermal centers and build 54 new ones by 2020. There are many new developments in Algeria, where 70 springs have been granted to private investors, 13 new private facilities have opened, and $100 million is being invested to modernize eight publicly-owned thermal centers and 40 traditional thermal hammams. Both countries are also raising quality standards through workforce training (Algeria) and new ISO certification for thalassotherapy facilities (Tunisia).
- Meanwhile, several countries that do not have an established hot springs industry or tradition are recognizing the value of these natural resources for tourism development. For example, Oman is now promoting its natural springs on its national tourism website. Saudi Arabia is promoting investment in hot springs to establish therapeutic, recreational, and wellness resorts that will attract domestic and regional tourists for both wellness and medical tourism. Even Iraq has recently reopened its historic Hammam al-Alil, a historic hot springs facility that used to receive thousands of wellness and medical tourism visitors prior to the war.

Sub-Saharan Africa Highlights (2017)

Wellness Real Estate

Wellness Real Estate Market:
$0.1 billion (3.4% CAGR from 2015-2017)

Wellness Lifestyle Real Estate (Residential) Project Pipeline:
6 projects

Workplace Wellness

Number of Workers with Access to Workplace Wellness Programs & Services:
4.4 million (1.1% of employed workers)

Expenditures on Workplace Wellness:
$0.3 billion (9.5% CAGR from 2015-2017)

Wellness Tourism

Number of Wellness Trips:
6.5 million (10.1% CAGR from 2015-2017)

Wellness Tourism Expenditures:
$4.8 billion (7.0% CAGR from 2015-2017)

Average Expenditure per Trip:
$1,215 for intl./inbound (63% premium);
$194 for domestic (126% premium)

Spas

Number of Spas:
3,984 (31.1% CAGR from 2015-2017)

Spa Revenues:
$1.6 billion (20.3% CAGR from 2015-2017)

Spa Employment:
46,171 (26.4% CAGR from 2015-2017)

Thermal/Mineral Springs

Number of Thermal/Mineral Springs Establishments:
50 (13.2% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Revenues:
$0.08 billion (18.4% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Employment:
1,130 (14.1% CAGR from 2015-2017)

Top Four Wellness Real Estate Markets in Sub-Saharan Africa, 2017

	Market Size (US$ millions)
South Africa	$93.8
Botswana	$2.0
Namibia	$1.5
Mauritius	$1.3

Source: Global Wellness Institute

Top Four Workplace Wellness Markets in Sub-Saharan Africa, 2017

	# of Workers Covered (millions)	Expenditures (US$ millions)
South Africa	1.3	$101.9
Nigeria	0.8	$56.3
Kenya	0.4	$29.2
Ghana	0.3	$22.5

Source: Global Wellness Institute

Top Ten Wellness Tourism Markets in Sub-Saharan Africa, 2017

	Number of Trips (millions)	Receipts/Expenditures (US$ millions)
South Africa	4.0	$2,250.3
Kenya	0.3	$412.3
Mauritius	0.2	$315.1
Tanzania	0.2	$302.7
Seychelles	0.1	$282.8
Uganda	0.2	$146.6
Nigeria	0.1	$134.0
Madagascar	0.1	$120.5
Zimbabwe	0.2	$117.8
Botswana	0.3	$115.0

Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Source: Global Wellness Institute

Top Ten Spa Markets in Sub-Saharan Africa, 2017

	Number of Spas	Spa Revenues (US$ millions)	Spa Employment
South Africa	1,161	$715.0	23,053
Kenya	304	$133.6	3,062
Tanzania	261	$104.7	2,469
Seychelles	70	$88.6	953
Nigeria	362	$82.7	2,508
Mauritius	216	$78.9	2,203
Uganda	145	$48.1	1,035
Madagascar	120	$44.0	1,162
Ghana	144	$38.5	966
Namibia	88	$35.8	1,247

Source: Global Wellness Institute

Top Four Thermal/Mineral Springs Markets in Sub-Saharan Africa, 2017

	Number of Establishments	Revenues (US$ millions)
South Africa	29	$58.2
Ethiopia	4	$7.1
Namibia	3	$5.9
Madagascar	4	$4.1

Source: Global Wellness Institute

Sub-Saharan Africa Developments

Wellness Lifestyle Real Estate

- In Africa, wellness lifestyle real estate is just starting to garner interest in South Africa, with a small handful of mixed-use development projects adding healthy and active design features and amenities. In 2016, the Green Building Council of South Africa launched a Green Star Sustainable Precincts Tool for certifying sustainable/healthy communities, with eight pilot projects committed to pursuing certification. There has also been some focus on building healthier communities in selected cities across Africa via the WHO's Healthy Cities network and the Healthy Cities CityLab program, but these have primarily been public policy and research-focused efforts.

Workplace Wellness

- Only a miniscule portion of the region's workforce (about 1%) benefits from any kind of workplace wellness program, with the majority of these workers in South Africa. As an early adopter of employee wellness initiatives (beginning in the 1980s), South Africa has a robust sector of wellness programs, third party providers, and research initiatives in workplace wellness. Elsewhere in Africa, even though chronic disease is rising and interest in fitness and healthy eating is increasing among a burgeoning middle class, the concept of wellness has not yet flowed into the workplace. With many people living in subsistence and low-income conditions, workforce health concerns have focused on basic workers' rights, amenities, and services such as safe drinking water, primary health care, working conditions, and safety. Most employers with wellness programs are focusing on HIV/AIDS prevention, education, free screenings, emergency medical care, etc., because their impacts are felt directly by employers in terms of absenteeism, presenteeism, hospitalization rates/costs, and worker deaths.

Wellness Tourism

- Several African countries are actively promoting wellness tourism, including Mauritius, Namibia, South Africa, and Tanzania, primarily focusing on spa offerings to diversify from the traditional safari or beach tourism for international visitors. While "spafari" – high-end safari lodges that offer spas services - has been around for a while, many destinations have moved from a spa/pampering focus to holistic wellness, adding offerings such as "mindfulness safaris," "yoga in the wilderness," and "body treatments in the bush," and incorporating local ingredients and treatments/therapies rooted in African traditions.

- All across Africa, from island resort destinations (e.g., Seychelles, Mauritius, Madagascar) to the Southern and Eastern African nations strong in the safari/wildlife/ecotourism niche, destinations are adding wellness offerings to their product mix. We have also seen tremendous growth in the number of wellness retreats and yoga retreats in Africa, combining wellness with complementary travel interests in the eco, adventure, spiritual, and cultural categories. The natural beauty and wilderness across this vast continent create unique opportunities, such as stargazing in Namibia, meditation among wildlife in Zambia, and long uninterrupted beach walks in Mozambique.

- Overall, wellness tourism has the potential to offer enormous economic, social, conservation, and branding benefits to the African continent. Tourism has long been an ambassador industry for any country or region. With its focus on holistic health, healing, and authentic experiences, wellness tourism highlights and promotes a country's strengths that are rooted in nature, culture, heritage, and traditions. These are strong counters to the negative images often promoted in the media about Africa (e.g., underdevelopment, disease, political instability, etc.). Because indigenous culture and the environment are so important in this niche market, wellness tourism can increase the motivations among government, businesses, and communities to protect wildlife, natural resources, and local culture and promote environmental sustainability. And, with wellness experiences increasingly linked to the wellness of the place, wellness tourists are more aware of and interested in the wellbeing of the local people and their communities. Therefore, it will be important in Africa to ensure that wellness tourism development is aligned with the development needs of local communities and brings benefits in all aspects (economic, social, environmental, etc.).

Spas

- Many countries in Sub-Saharan Africa have well-established spa industries (e.g., South Africa, Nigeria, Kenya, Mauritius, etc.) but in most countries, spa clients are expats or wealthy/upper-middle-class consumers who have traveled internationally and have been exposed to spas elsewhere. While this is changing, the perception of spa as a luxury service for the wealthy can narrow the market growth opportunities. Other forces that may hold back the industry include the lack of standards/regulations and skilled workforce.

- In the past, spa offerings/products/menus have been relatively homogenous and based on western spa models. In recent years, there is increasing interest in and demand for uniquely African wellness treatments and healing traditions. Offerings from calabash massage to the izinyawo foot cleanse to drumming meditation and healing are increasingly appearing in spas across the region. There is also rising demand for homegrown products and brands, especially herbal blends and natural and organic beauty/skin care products that are rooted in local ingredients and traditions. Many African ingredients (e.g., argan oil, shea butter, rooibos, etc.) have already found their way into mainstream beauty/skin products around the world. There is also more awareness of the need to cater to different skin types. With consumer interest pushing the global beauty/skincare industry toward natural and new botanical ingredients, the continent's rich cultural heritage and biodiversity offers exciting opportunities.

Thermal/Mineral Springs

- Many countries in Sub-Saharan Africa are rich in thermal waters, but the thermal/mineral bathing sector remains primitive and underdeveloped across the region. South Africa is the only country with a significant thermal/mineral springs industry. Its hot spring resorts tend to focus on recreation and leisure (rather than health and wellness offerings), and most offer relatively rustic accommodations (e.g., camping, cabins, and self-catering chalets). These almost exclusively serve the domestic market. A number of historic hot springs resorts in South Africa, dating from the early 20th century, have fallen into disuse and disrepair, and efforts to renovate and revitalize these facilities have been limited and small in scale. Meanwhile, Namibia recently made significant investments in modernizing its two major hot springs resorts (Gross Barmen in 2014 and Ai-Ais in 2017), and Madagascar has renovated and reopened its historic Hotel Thermal Ranomafana.

- Kenya and Rwanda, both of which have robust and high-growth tourism industries, are now looking to tap their undeveloped thermal water resources to boost wellness tourism. Thermal/mineral waters can help diversify their tourism offerings and can appeal to wealthy, safari-seeking international visitors as well the growing market of intra-regional African travelers. Rwanda is currently seeking investment to develop its first hot springs-based wellness and eco resorts (at Gihaya Island and Rubavu). Kenya recently opened the KenGen Olkaria Geothermal Spa, the continent's largest thermal bathing facility, modeled after Iceland's Blue Lagoon.

APPENDIX A: WELLNESS ECONOMY DEFINITIONS

1. Wellness Economy Sectors

Wellness real estate: 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. Note that *wellness real estate* is broader than (but encompasses) *wellness lifestyle real estate*, which focuses on the residential component.

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.

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.

Spa economy: Refers to spas and the related cluster of sectors that support and enable spa businesses. The spa economy includes: spa facilities, spa education (for therapists and managers/directors, both initial training and continuing education), spa consulting, spa capital investments, spa associations, and spa-related media and events.

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

Fitness and mind-body: Includes gyms and health clubs; personal training; yoga, Pilates, Tai Chi, martial arts, and other mind-body practices; fitness and exercise clothing; fitness and exercise equipment; and wearable devices.

Healthy eating, nutrition, and weight loss: Includes vitamins and supplements, fortified/functional foods and nutraceuticals, natural and organic foods, health foods, sports nutrition, nutrition and dietary services, and weight loss/management products and services.

Personal care, beauty, and anti-aging: Includes 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.

Preventive and personalized medicine and public health: Includes 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 sophisticated information and data for individual patients (including genetic, molecular, and environmental screening, analysis, and diagnostics; personalized disease management services; and health IT such as electronic health records, telemedicine, and remote patient monitoring) to provide tailored approaches for preventing disease, diagnosing and managing risk factors, or managing and treating conditions.

Traditional and complementary medicine: Encompasses diverse medical, healthcare, holistic, and mentally or spiritually-based systems, services, and products that are not generally considered to be part of conventional medicine or the dominant health care system – including homeopathic, naturopathic, chiropractic, Traditional Chinese Medicine, Ayurveda, 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.

2. Wellness Tourism

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

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.

3. Spa Economy

SPA ECONOMY SECTORS

Spa facilities: 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. The core of the spa economy, 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.

Spa capital investment: Includes expenditures on the construction and finishing of new spa facilities, initial outlays for spa equipment and amenities, and expenditures for major upgrades and expansions of existing spa facilities beyond regular upkeep and maintenance.

Spa education: Encompasses individual expenditures by spa therapists and spa managers, both to enter the profession (initial degrees or certifications) and to advance in their jobs (continuing education). Includes training and certification programs offered by private and public trade schools, colleges, and universities; professional programs provided by hospitality, tourism, and business schools; and continuing education, workshops, and short courses offered by associations, private companies, and nonprofits.

Spa media, associations, and events: Represents important activities that support and promote spas and connect industry stakeholders. Often businesses in this sector are engaged in all three of these activities – for example, spa associations often organize trade shows, while also operating websites and distributing publications that promote the industry.

Spa consulting: Include many activities: conceptualization, design, and branding of new spas; spa management and operational consulting; spa training solutions; spa research and benchmarking; and other related services.

SPA FACILITY CATEGORIES

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.

4. 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:

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.

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

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CANYON RANCH

Canyon Ranch® has been a trailblazer and an industry-leading proponent of the wellness lifestyle and real estate living for nearly 40 years, operating the world's most celebrated collection of life-enhancement properties. Canyon Ranch has wellness destinations in Tucson, Arizona and Lenox, Massachusetts. In addition, Canyon Ranch operates the world's largest day spa at The Venetian® & The Palazzo® hotels in Las Vegas, Nevada and 22 Canyon Ranch at Sea® wellness facilities onboard luxury cruise ships: Cunard Cruise Line, Oceania® Cruises, Regent Seven Seas Cruises®, and on Celebrity Cruises®. Canyon Ranch is a 13-time winner of Travel + Leisure's Best Spa Award, an 11-time recipient of the Condé Nast Traveler Best Destination Spa Award, is honored by Town & Country as one of the 'Best Luxury Spas in the World' in their 2017 Spa Awards and is recognized as the 'Best Wellness Program' by Virtuoso's 'Best of the Best' 2017 awards. Visit Canyon Ranch at www.canyonranch.com.

Gold Level

BOOKER BY MINDBODY

Booker by MINDBODY is transforming the way beauty and wellness services are managed by local businesses and discovered by consumers. Booker replaces everything from manual methods to disconnected software, and unifies the essential components of running a service business into a single web-based platform, accessible from any device. Booker was acquired by MINDBODY, the leading technology platform for the fitness, beauty and wellness services industries, in April 2018. Together, Booker and MINDBODY also enable beauty and wellness businesses to sell their services online, through their website and a network of partner sites and apps, creating a seamless online booking experience for consumers. For more information on Booker, visit www.booker.com, and for more on how MINDBODY is helping people lead healthier, happier lives by connecting the world to wellness, visit www.mindbodyonline.com.

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The HydraFacial Company is revolutionizing skin health for aesthetic professionals and their clients. Innovating for over 20 years, we have 54 patents issued/pending and numerous awards including New Beauty's Best, 4 years running. We are loved around the world, found in over 10,000 locations throughout 80 countries. The HydraFacial is a 3-step, 30-minute treatment that cleanses, extracts, and hydrates while quenching skin with vital nutrients like antioxidants, peptides, and hyaluronic acid. The amazing results are both instant and long-lasting, improving the appearance of fine lines, enlarged pores, congested skin, and dark spots. For more information, visit HydraFacial at www.HydraFacial.com.

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BODYHOLIDAY

BodyHoliday in Saint Lucia is not only a great beach vacation but it has been famed for its unique approach to health and wellbeing. The experience is a combination of the very best of a vacation combining individual tailored classes in fitness, nutrition, lifestyle and overall wellness. It is designed to be the most relaxing, rejuvenating beach vacation in the world. BodyHoliday makes a promise, "Give us your body for a week and we'll give you back your mind". It offers a range of personalized treatment, therapies while taking advantage of the most comprehensive activity and exercise schedules. What makes it great is that you can do as much or as little as you like; enjoy an active fun filled vacation or choose to lie back and do nothing at all! Visit BodyHoliday at www.thebodyholiday.com.

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Cannuka is a medically inspired natural skincare line that combines two powerful ingredients; cannabis CBD and Manuka honey. Together, the unique healing properties of cannabis CBD and Manuka honey provide a daily skin therapy that both calms and heals skin — for your face, lips, cuticles, elbows, and anywhere else there's dryness or inflammation. In fact, it's the natural, potent anti-inflammatory characteristics of the ingredients that make it so effective. Inflammation is the one constant in skin problems, and Cannuka is specifically designed to help reduce inflammation and soothe skin. Visit Cannuka at www.cannuka.com.

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LAKE AUSTIN SPA RESORT

The award-winning 40-room luxury wellness resort in Austin, Texas has been at the forefront of organic gardening and healthy cuisine for 20 years. Today, a luxe water taxi transports guests to the idyllic lakeside destination to enjoy science backed wellness classes on the water, Culinary Experience weeks and cooking classes, hiking, yoga and more than 130 weekly classes. Over 100 unique and healing services are offered at the resort's 25,000-square foot LakeHouse Spa. Sublime interiors with original art and antiques, coupled with breathtaking interactions in nature and Conscientious Cuisine prepared by Executive Chef Stéphane Beaucamp create an immersive wellness experience for guests seeking respite and retreat. Visit Lake Austin Spa Resort at www.lakeaustin.com.

MIRAVAL AND EXHALE

Hyatt's wellness brands are Miraval and exhale. Miraval is a global leader in wellness resorts and spas. Opened in 1995 Miraval Arizona pioneered the destination wellness spa resort category with its comprehensive program of activities, experiences, and personal treatments. Miraval's core is mindfulness, and its motto "life is better when in balance" guides each visit. Activities include fitness, meditation, yoga, well-being, equine, hiking, biking, and metaphysical exploration. Miraval Life in Balance Spa opened in April 2016 at Monarch Beach Resort in Dana Point, CA, and in November 2017 at Park Hyatt St. Kitts Christophe Harbour. Additionally, Miraval will unveil two new properties including Miraval Austin in Fall 2018 and Miraval in the Berkshires in 2019. With 24 locations worldwide, exhale offers a combination of cardio, barre, and yoga classes along with healing spa therapies, providing a sanctuary for people to escape the day-to-day and take time to be well. Visit Miraval Group at www.miravalresorts.com and exhale at www.exhalespa.com.

OM4 ORGANIC MALE

OM4 Organic Male is the first skin type and condition-specific professional men's line to launch in the US. On the leading edge of performance-based, green science organics, OM4 globally sources clinically-advanced, socially-responsible ingredients to target the unique biological skin differences and concerns of men. The brand mantra: 4 PRODUCTS | 4 STEPS | 4 MINUTES | 4 MEN. Color coded by skin type with each step numbered, OM4 is intuitively designed to be fast, easy and effective. OM4's core business is to help partners: (1) grasp the psychology of selling to men, and (2) capture a greater percentage of the fastest growing market in spa. Visit OM4 Organic Male at www.om4men.com.

PERFORMANCE HEALTH

Headquartered in Akron, Ohio, Performance Health is a leading designer, manufacturer and marketer of branded massage, spa, rehabilitation, and wellness products sold into a variety of U.S. clinical markets, leading national retailers and in over one hundred countries through a multi-national network of distribution partners. The Company's product offering includes an innovative line of market-leading topical analgesics, professional massage products and a broad range of rehabilitation and wellness products. Performance Health markets its diverse product offering under the well-known and highly recognized TheraBand®, Biofreeze®, Cramer®, Bon Vital'®, Thera°Pearl® and Perform® brand names.Visit Performance Health at www.performancehealth.com.

PURE

Founded in 2003 PURE is the global leading provider of healthy indoor spaces. With locations serving 15 international markets, PURE has partnered with industry leaders in hospitality, maritime, fitness, scholastic, office and residential applications. PURE's patented seven step Wellness program purifies every surface and air particle, providing environments that exceed industry standards by more than 50%. Whether you're traveling for business, cruising for pleasure, providing the healthiest work or fitness environment, PURE's wellness environments are a sanctuary of peace, health and tranquility. Every surface is allergy friendly, and the air is as pure as an ocean breeze. You can feel fresher, breathe deeper, and live better. Currently over 2.5 million people per month experience PURE Wellness spaces. Winner of the innovation award from the School of Hospitality Management at Cornell, and the coveted Parent Tested Parent Approved seal of approval award, PURE is evolving quickly as the number one name in indoor environmental quality and wellness. Visit PURE at www.purespaces.com.

RANCHO LA PUERTA

Each week guests at Rancho La Puerta Fitness Resort and Spa in Tecate, Baja California, Mexico, renew their minds, bodies, and spirits on a journey to true wellness. Founded in 1940, The Ranch pioneered the concept of a true destination spa, for both its guests and employees. Over 440 employees and their families are part of the Employee Wellness Program, which provides daily fitness classes, complimentary medical services, and healthy living workshops on topics such as chronic disease prevention and nutrition. The Ranch is dedicated to ensuring that both guests and employees live long, healthy, active, and inspired lives. Visit Rancho La Puerta at www.rancholapuerta.com.

SERENBE

Serenbe is the leading global wellness community focused on all aspects of a well-lived life. Featuring a range of homes, an organic farm, a wellness center, Swim Club, arts and cultural programing, multiple restaurants and boutiques plus over 15 miles of nature trails, all set within hundreds of acres of preserved land. Serenbe is a biophilic model for building community with nature first and wellbeing at its core. Walk out your back door into nature and out your front door for a world-class meal; the best reason to live here is the life here. Visit Serenbe at www.serenbe.com.

SIX SENSES

Six Senses Hotels Resorts Spas are discovered in some of the world's most beautiful places. They are synonymous with a unique style – authentic, personal and sustainable, and in harmony with individual surroundings; local, yet in tune with the wider world. They are intimate, offering an emotionally intelligent approach to anticipative service, which supports delightful and unexpected surprises. Crafted guest experiences stimulate, energize and revitalize the human spirit, spa and wellness programming is all pervasive. All aspects of Six Senses' operations, including the Evason brand, embrace these values, which define the brand and the enduring Six Senses mission: To help people reconnect with themselves, others and the world around them. Visit Six Senses at www.sixsenses.com.

SUBZ3RO

Founded in 2016, the subz3ro experience takes the spa concept on a new dimension where ground-breaking and innovative cold therapy treatments are taking the wellness sector by storm. Recently recognized as Top Luxury Spa Mexico and Global Leader in Cryotherapy, subz3ro specializes in cryostimulation – a form of Cold Therapy, which safely reduces the skin's surface temperature below zero, reducing the body's chronic inflammation and improving overall wellness. Although often considered a recovery treatment for elite athletes, subz3ro's success has been its focus on leveraging cryostimulation as an alternative to invasive treatments such as BOTOX® and PRP, reducing cellulite and spider veins to rejuvenate and enhance the appearance and feel of the skin. Visit subz3ro at www.subz3ro.mx.

UNIVERSAL COMPANIES

For more than 30 years, over 30,000 spa professionals in 47 countries have trusted Universal Companies to be their single-source supplier, providing thousands of products to help them manage and grow their businesses. Located in beautiful and historic Abingdon, Virginia, we distribute furniture, fixtures, equipment, implements, supplies, and spa apparel to customers from the largest spa to the independent practitioner. Universal Companies also offers professional skin and body products, retail items, and merchandising tools, and provides spas with innovative consulting services, educational materials, and training options. For more information about Universal Companies, please call 800-558-5571 or visit www.universalcompanies.com.

WESTIN HOTELS & RESORTS

Westin Hotels & Resorts, a leader in wellness and hospitality for more than a decade, empowers guests and associates to take back control of their well-being while traveling through the brand's Six Pillars of Well-Being: Sleep Well, Eat Well, Move Well, Feel Well, Work Well and Play Well. At more than 220 hotels and resorts in nearly 40 countries and territories, guests can experience offerings that include the iconic Heavenly® Bed, RunWESTIN™, TRX® Suspension Training equipment, Peloton and Westin Gear Lending with New Balance, among others. To learn more, visit www.westin.com. Stay connected to Westin: @ westin on Twitter and Instagram and facebook.com/Westin.

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EMPOWERING WELLNESS WORLDWIDE

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APPENDIX E

Global Wellness Economy Monitor:

Wellness Lifestyle Real Estate

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Global Wellness Economy Monitor:

Wellness Lifestyle Real Estate

OCTOBER 2018

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Information included in the Global Wellness Tourism Economy: Europe report originally appeared in the Global Wellness Economy Monitor (October 2018) report available at

GLOBALWELLNESSINSTITUTE.ORG

ABOUT THE AUTHORS

ABOUT THE GLOBAL WELLNESS INSTITUTE

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

www.globalwellnessinstitute.org

ABOUT THE AUTHORS

The *Global Wellness Economy Monitor* was prepared by Ophelia Yeung and Katherine Johnston, Senior Research Fellows at the Global Wellness Institute. Together, they have four decades of experience leading research and strategy development for businesses, universities, research institutions, and multilateral and government organizations under the auspices of SRI International, a Silicon Valley-based technology and innovation company. Since 2008, Ms. Yeung and Ms. Johnston have worked with the team at what has become the Global Wellness Institute to pioneer groundbreaking research on the global wellness economy and its subsectors. They were assisted in this research by Tonia Callender, GWI Research Fellow.

EXECUTIVE SUMMARY

Valued at $4.2 trillion in 2017, the wellness economy continues to expand faster than global economic growth.

The Global Wellness Institute (GWI) defines wellness as t***he active pursuit of activities, choices, and lifestyles that lead to a state of holistic health.*** In 2014, GWI published the first Global Spa & Wellness Economy Monitor, measuring the size of the global wellness economy for the first time. ***The wellness economy encompasses industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives.*** We include ten sectors in the global wellness economy (see figure below), which together are worth $4.2 trillion in 2017, representing 5.3% of global economic output.[1] By comparison, global health expenditures were estimated at $7.3 trillion in 2015.[2] From 2015-2017, the wellness economy grew from $3.7 trillion to $4.2 trillion, or by 6.4% annually, a growth rate nearly twice as fast as global economic growth (3.6%).[3]

GLOBAL WELLNESS ECONOMY: $4.2 trillion in 2017

Note: Numbers do not add due to overlap in segments. Dark colored bubbles are the sectors for which GWI conducts in-depth, country-level primary research. Light colored bubbles are sectors for which GWI aggregates global estimates only, drawing from secondary sources. Source: Global Wellness Institute.

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1 See *Appendix A* for definitions of the ten wellness economy sectors.

2 Global health expenditures data from: WHO, *Global Health Expenditures Database,* http://apps.who.int/nha/database/Home/Index/en. 2015 is the most recent year available.

3 Global GDP data from: IMF, *World Economic Outlook Database,* April 2018 Edition, https://www.imf.org/external/pubs/ft/weo/2018/01/weodata/index.aspx.

Since 2014, GWI has extended its detailed market estimates to include five wellness economy sectors: *Wellness Real Estate*, *Workplace Wellness*, *Wellness Tourism*, *Spa,* and *Thermal/Mineral Springs*. For the other five sectors, we aggregate secondary global industry data from multiple sources to arrive at the estimated market size. This report provides original data and discusses the development and prospects of the five wellness sectors that GWI tracks in detail.

Wellness Economy Sectors, 2015 and 2017

	Market Size (US$ billions)		**Average Annual Growth Rate**
	2015	**2017**	**2015-2017**
Personal Care, Beauty, & Anti-Aging	$999.0	$1,082.9	4.1%
Healthy Eating, Nutrition, & Weight Loss	$647.8	$702.1	4.1%
Wellness Tourism	$563.2	$639.4	6.5%
Fitness & Mind-Body	$542.0	$595.4	4.8%
Preventive & Personalized Medicine and Public Health	$534.3	$574.8	3.7%
Traditional & Complementary Medicine**	**$199.0	**$359.7	**
Wellness Real Estate***	$118.6	$134.3	6.4%
Spa Economy *(Spa Facilities)*	$98.6 *($77.6)*	$118.8 *($93.6)*	****9.8% *****(9.9%)*
Thermal/Mineral Springs	$51.0	$56.2	4.9%
Workplace Wellness	$43.3	$47.5	4.8%
Wellness Economy	***$3,724.4**	***$4,220.2**	**6.4%**

** Figures do not sum to total due to overlap in segments.*

*** The definition and measurement of this sector has changed from 2015 to 2017, and so the two numbers should not be directly compared as a time series. In 2017 we have incorporated an expanded measurement of traditional medicine into this sector (e.g., Traditional Chinese Medicine, Ayurveda, etc.) due to improved global data availability on those segments. 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.*

**** The name for this sector has changed from 2015 to 2017, based on the methodology elaborated in GWI's recent "Build Well to Live Well" report. It is now labelled "wellness real estate" to emphasize that the measurement includes residential AND commercial/institutional building, as opposed to "wellness lifestyle real estate" (which focuses on the residential component).*

***** The high growth rate for spa revenues is not entirely due to new builds, but also due to a dramatic increase in the number of hotels/resorts listing themselves and their spa facilities/services on global online booking sites, especially in emerging market countries.*

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

The environments in which we live, work, and travel are critical yet largely underappreciated determinants of our wellness.

Our health is a result of complex interactions among genetic factors and numerous interrelated external determinants (e.g., socio-economic factors, our physical environment, access to healthcare). These external factors form a complex "wellness ecosystem"[4] that can augment or reduce the impacts of our genes. What may be surprising from recent research findings is that genetics may account for as little as 10-15% of our health outcomes, while external and environmental factors play a much more important role.[5] There is ample and growing evidence that our health and longevity are greatly affected by the physical environments in which we live, work, and travel, and yet these environments continue to receive scant attention from the medical community. This lopsided investment calculus needs to change. To combat the growing epidemic and escalating costs of chronic disease, we must address the many aspects of our daily environments that drive our individual and collective health and wellbeing.

Wellness sectors are no longer siloed industries. They will increasingly converge as we integrate wellness into our homes and communities, our work, and our travel.

All ten wellness sectors are dynamic and interconnected, intrinsically linked to the wellness economy as a whole. In the face of longer lifespans, rising chronic disease, stress, and unhappiness, we are reexamining our lives and refocusing our attention on what makes us well – particularly the places and manner in which we live, work, and travel. The wellness economy mirrors those shifting priorities, alongside a growing recognition of the critical impact of external environments on our health and wellbeing. Among the ten wellness economy sectors, three of them represent those critical, interrelated environments in which we live our daily lives – *wellness lifestyle real estate and communities* (live), *workplace wellness* (work), *and wellness tourism* (travel). However, the other seven wellness sectors do not operate independently from, or outside of, these spheres. They are all essential components of a **"wellness ecosystem"** that nurtures a lifestyle of wellbeing and longevity, because we consume wellness goods and services in the homes and communities where we live, where we work, or when we travel. As we integrate wellness into all aspects of our daily lives, we can expect increasing convergence of all wellness sectors into these three core spheres, through acquisitions, partnerships, horizontal/cross-category expansions and innovations, and emergence of new business models.

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[4] See: Institute of Medicine (2006). *Genes, Behavior, and the Social Environment: Moving Beyond the Nature/Nurture Debate.* Washington, DC: The National Academies Press.

[5] See: Global Wellness Institute (2018). *Build Well to Live Well: Wellness Lifestyle Real Estate and Communities.*

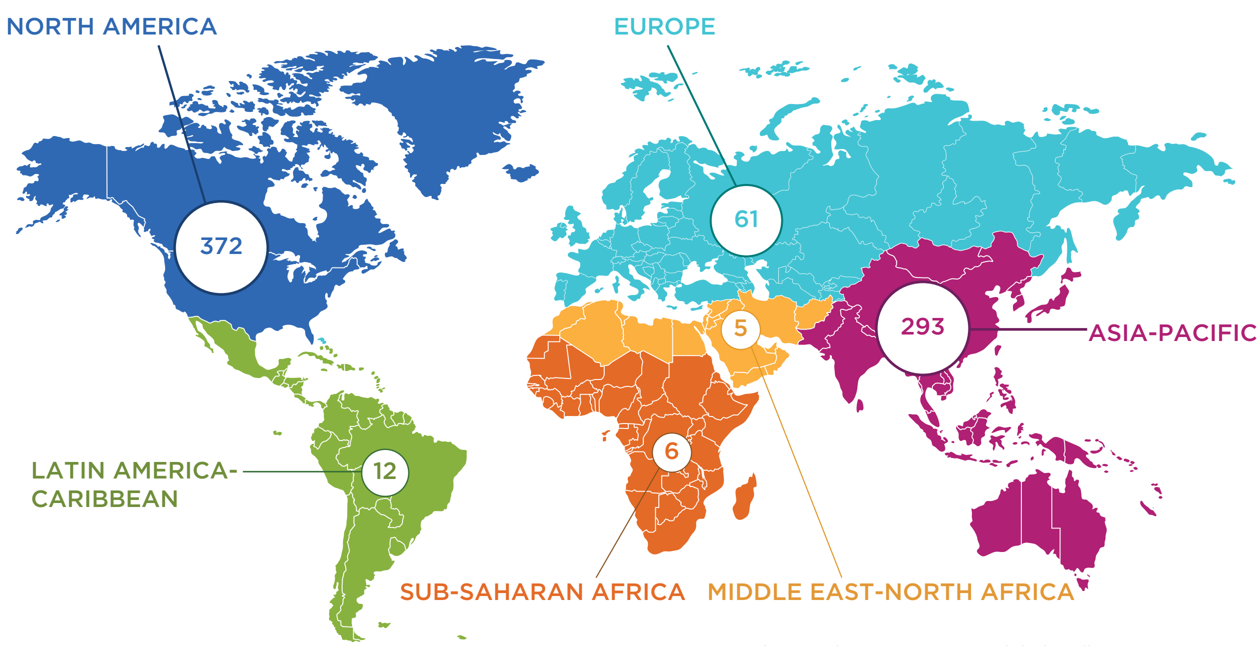
Wellness real estate is a fast-growing $134 billion industry, buoyed by rising health consciousness and a desire to bring wellness into the places where we spend the majority of our time.

Earlier in 2018, GWI unveiled the research report Build Well to Live Well, where we defined wellness real estate as ***the construction of residential and commercial/institutional properties that incorporate intentional wellness elements into their design, materials, and building as well as their amenities, services, and/or programming.*** GWI estimates that the global wellness real estate sector is worth $134 billion in 2017, growing at 6.4% annually since 2015. For comparison, this is about 1.5% of the total annual global construction market and about half the size of the global green building industry.[6] Note that wellness real estate is broader than (but encompasses) wellness lifestyle real estate, which focuses on the residential component.[7]

GWI's research found more than 740 wellness lifestyle real estate and community developments built, partially built, or in development, across 34 countries as of November 2017, and this number is growing every day. These include master-planned communities, multi-family housing, urban districts and mixed-use projects, resort- and spa-based real estate, and other types of projects around the world.

Wellness Lifestyle Real Estate Pipeline in 2017:

Over **740** projects across **34** countries



Note: Estimates as of November 2017. Source: Global Wellness Institute.

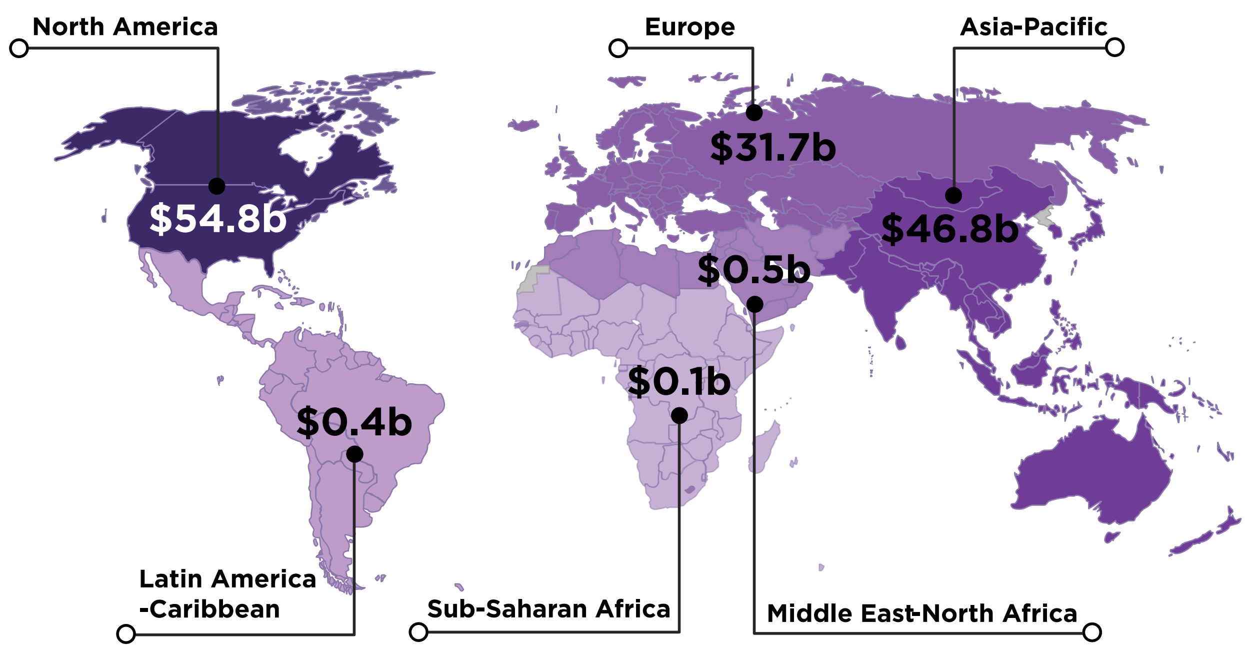
[6] U.S. Green Building Council (2015). *The Business Case for Green Building.* https://www.usgbc.org/articles/business-case-green-building.

[7] Because it is impossible to separate out the residential and non-residential components in commercial/institutional projects (e.g., mixed-use, hospitality, etc.), GWI estimates *wellness real estate* in aggregate, although the focus in this report is on the residential component or *wellness lifestyle real estate*.

Around the world, there is rising consumer interest in extending our wellness experiences from our vacation destinations and leisure activities to our homes and everyday lives. For most of us, our home represents our most important personal investment and one of our largest expenditures (about 20% of all consumer spending, or more than $9 trillion in 2017[8]), so it is only logical that our home should also be an investment in our health and wellbeing. Based on strong demand, GWI estimates that wellness lifestyle real estate and community projects positioned at the middle and upper ends of the market are currently achieving price premiums of 10-25%. The United States, along with a few key countries in Asia (China, Australia, India) and Europe (UK, Germany), account for three-quarters of the global wellness real estate market.

Wellness Real Estate Market by Region, 2017

Size of wellness real estate market



Source: Global Wellness Institute

[8] Global Wellness Institute analysis of global consumer expenditures data from Euromonitor International.

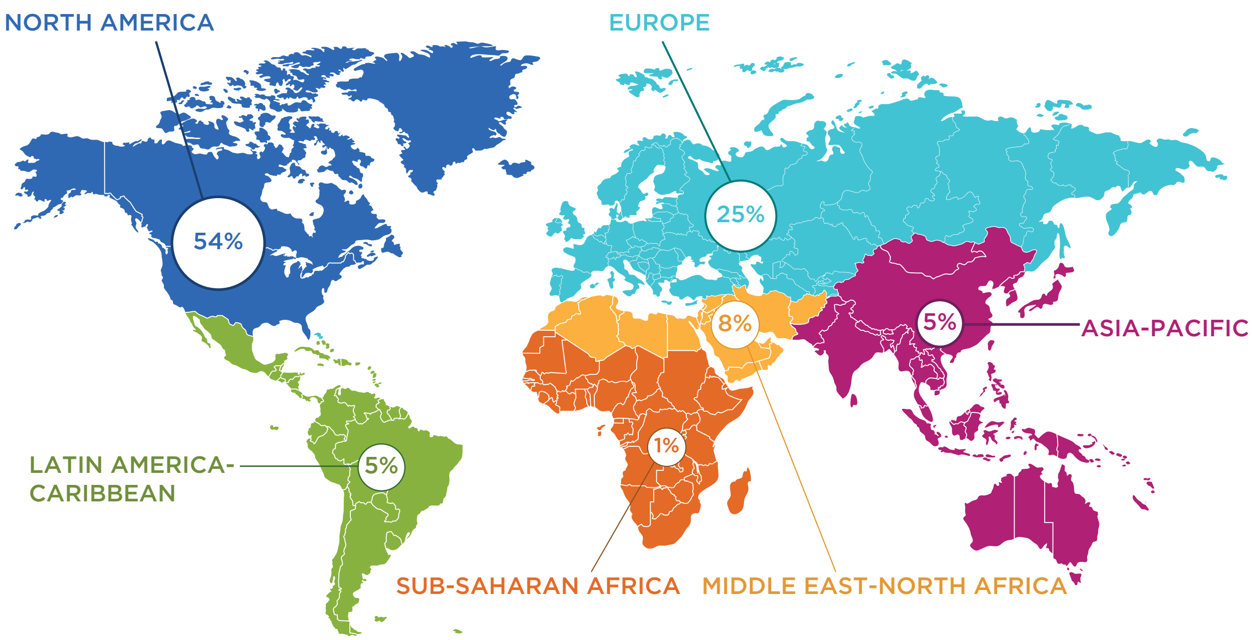
Valued at $48 billion, the workplace wellness market is small in comparison to the massive economic burden and productivity losses associated with an unwell workforce and widespread worker disengagement.

GWI measures the size of the global workplace wellness industry by estimating the ***expenditures made by employers to improve employee wellness.*** These include a wide variety of services, products, and platforms, such as health screening assessments, diagnostic tests, incentive programs, wearable devices, counseling services, etc., and they serve a wide range of needs, from exercise, healthy eating, and sleep, to chronic illness, obesity, addiction, depression, and stress. GWI estimates that this market grew by 4.8% annually over the past two years to reach $47.5 billion in 2017 (as compared to $43.3 billion in 2015).

However, this market is very small when compared to the economic burden of an unwell workforce – a cost estimated by GWI at 10-15% of global economic output (factoring in the medical costs and productivity losses caused by chronic diseases, work-related stress, injuries and illnesses, and disengagement).[9] Globally, less than 10% of the workforce benefits from workplace wellness initiatives, primarily those who live in the world's wealthiest economies or work for large or multinational companies. The majority of workers around the world are more concerned with meeting basic needs, such as earning a living wage, job stability, workplace safety, and access to basic healthcare.

Access to Workplace Wellness in 2017

Only **10%** of the world's workers have access to workplace wellness programs & services



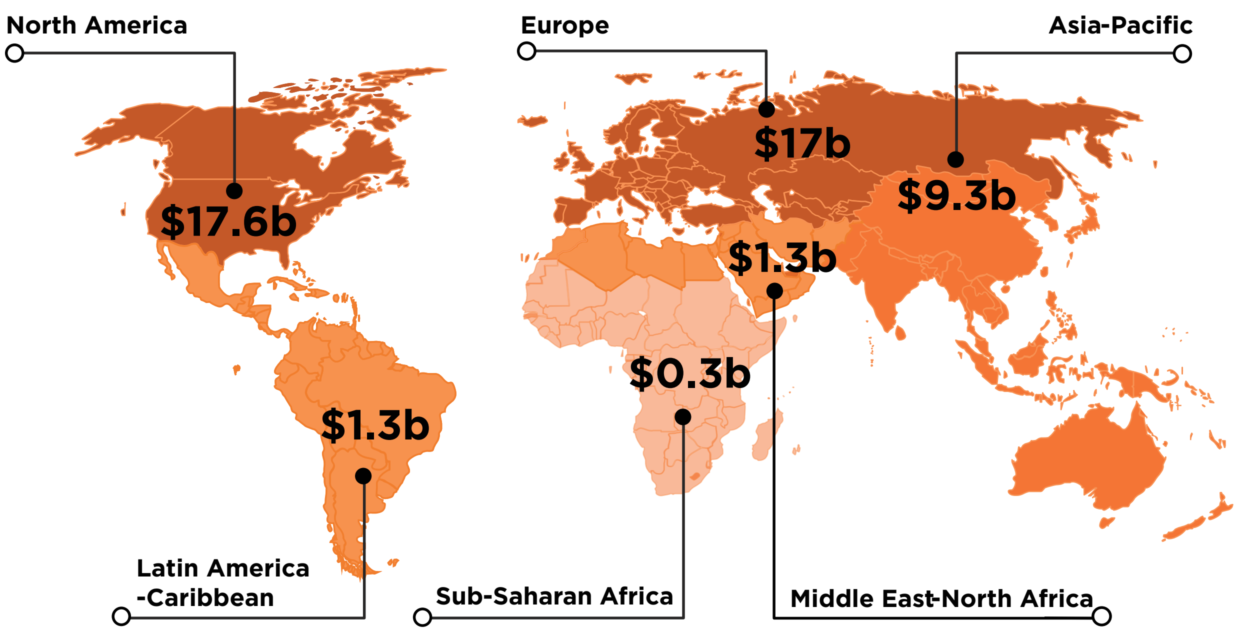
Percent of employed workers in each region who have access to workplace wellness programs/services.

Source: Estimates by the Global Wellness Institute, based upon data from the International Labour Organization, World Bank, and Conduent/Buck Consultants.

Overall, the global market for workplace wellness is concentrated in the high-income countries in North America, Western Europe, and Asia. Together, the top twenty markets in workplace wellness account for nearly 84% of global spending. Much of this spending is motivated by employers' desire to lower healthcare costs; improve morale, retention, and recruitment; and increase productivity and competitiveness. The United States remains by far the world's largest market for workplace wellness expenditures, estimated at more than $15 billion in 2017. Since the healthcare burden is mostly borne by employers in the United States, U.S. companies have the strongest incentives to control escalating medical costs while also improving productivity.

Workplace Wellness Market by Region, 2017

Employer expenditures on workplace wellness programs/services



Source: Global Wellness Institute.

[9] Global Wellness Institute (2016). *The Future of Wellness at Work.*

At $639 billion, wellness tourism is a significant and fast-growing segment of global tourism.

In the 2013 *Wellness Tourism Economy* inaugural study, GWI defined wellness tourism as ***travel associated with the pursuit of maintaining or enhancing one's personal wellbeing*** and measured its global size for the first time. Fast-forward five years, wellness tourism is now recognized as a significant and fast-growing tourism segment. Globally, wellness tourism has expanded from $563.2 billion in 2015 to $639.4 billion in 2017. The sector's 6.5% annual growth rate from 2015-2017 is more than double the 3.2% growth rate for general tourism. Travelers made 830 million wellness trips in 2017, which is 139 million more than in 2015.

Wellness tourism creates opportunities for wellness businesses and other businesses. The expenditures of wellness travelers benefit all travel industry segments (see figure below). While some expenditures are made on wellness-focused activities (such as visiting a hot spring, getting a massage, or taking a meditation or fitness class), others are "generic" travel expenditures (such as transportation, food and lodging, shopping, etc.). As more consumers incorporate wellness into their lifestyles, there are many opportunities for all businesses to infuse wellness into their offerings and capture spending by wellness travelers.

Wellness Tourism Industry in 2017

Data combine both inbound/international and domestic wellness tourism spending, and also include both primary and secondary wellness trips.

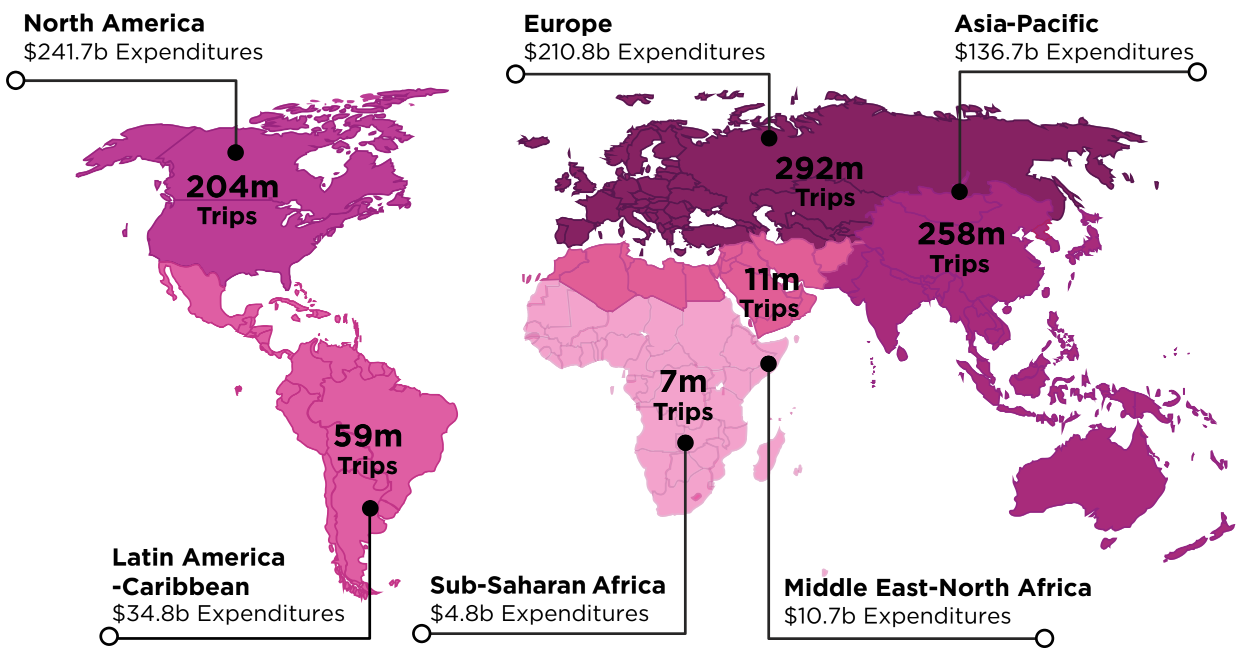
Source: Estimates by the Global Wellness Institute, based on tourism industry data from Euromonitor International.

The wellness tourism market includes two types of travelers: those who are motivated by wellness to take the trip or choose the destination ***(primary wellness travelers)*** and those who seek to maintain wellness or engage in wellness activities during travel ***(secondary wellness travelers)***. The bulk of wellness travel is done by secondary wellness travelers, who account for 89% of wellness tourism trips and 86% of expenditures in 2017. Wellness tourism is also high-yield tourism. GWI estimates that international wellness travelers spend at a 53% premium (over the average international tourist), while domestic wellness travelers spend at a 178% premium (over the average domestic tourist).

The rapid growth of wellness tourism around the world has been stimulated by a rising global middle class, increasing consumer desire to adopt a wellness lifestyle, and a growing interest in experiential travel. Across the world, Europe remains the destination for the largest number of wellness trips. North America continues to lead in wellness tourism expenditures because average spending per trip is higher. In the past five years, Asia has made the most gains in the number of wellness trips and wellness tourism expenditures, with demand stimulated by strong economies and an expanding middle class.

Wellness Tourism by Region, 2017

Number of wellness tourism trips and expenditures (inbound and domestic)



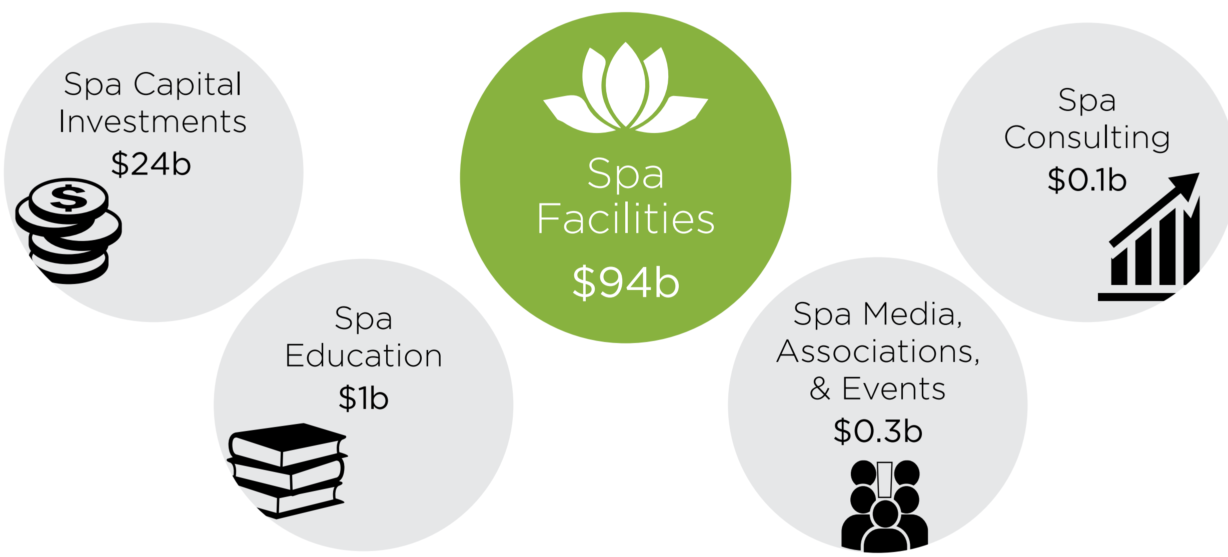
Source: Global Wellness Institute.

The $119 billion spa economy has grown in number of facilities, revenues, and employment, driven by strong economic growth and rising consumer interest in wellness.

Ten years ago, GWI unveiled The Global Spa Economy 2007 study, where we defined spas as ***establishments that promote wellness through the provision of therapeutic and other professional services aimed at renewing the body, mind, and spirit.*** In 2017, GWI estimates that the number of spas has grown to over 149,000, earning $93.6 billion in revenues and employing nearly 2.6 million workers. This represents 9.9% annual revenue growth, which is much higher than the pace observed in the previous two-year period. The main drivers of the spa industry are rising incomes, rapid growth of wellness tourism, and an increasing consumer propensity to spend on all things related to wellness.

The broader spa economy encompasses not only spa facility revenues, but also sectors that support and enable spa businesses, including capital investment; consulting; training of spa therapists and education of managers; and associations, media, and events businesses that promote spas. In 2017, these related sectors added $25.2 billion to the spa facility revenues of $93.6 billion, to create a $118.8 billion global spa economy.

Spa Economy: $119 billion in 2017

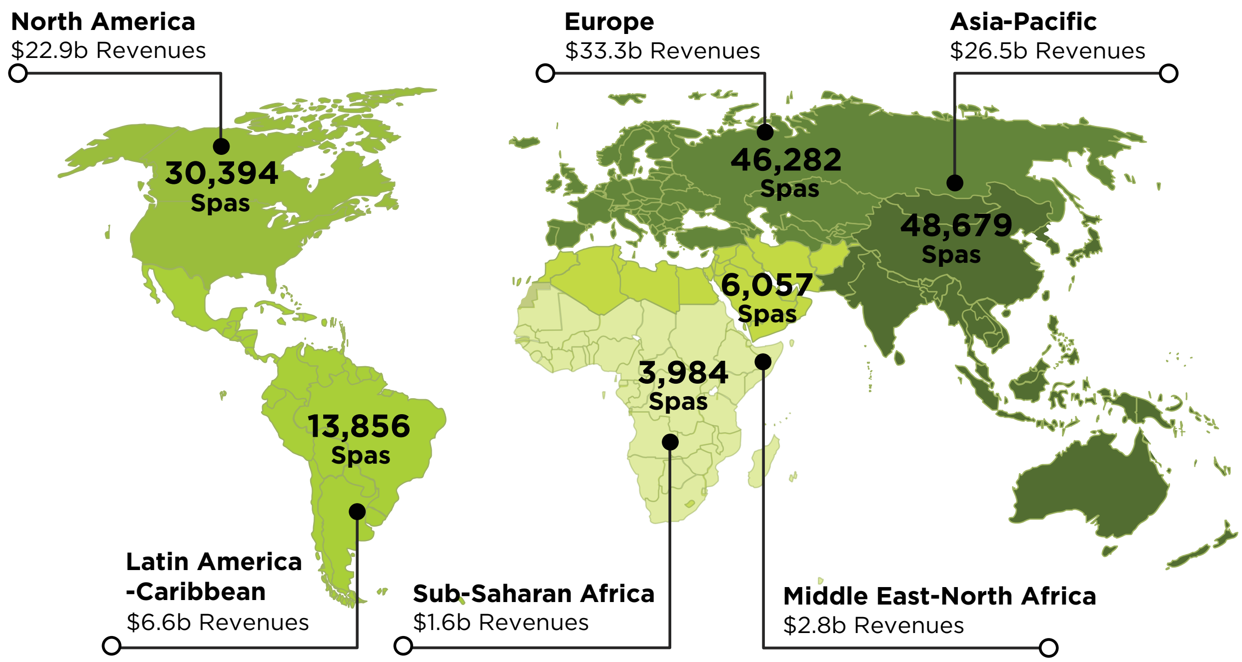


Note: Figures may not sum to total due to rounding.
Source: Global Wellness Institute

Asia-Pacific is home to the largest number of spas and also added the greatest number of new spas from 2015-2017. Europe led in total spa revenues in 2017. Across the world, the spa industry remains quite concentrated in the top markets. The top five countries (United States, China, Germany, Japan, and France) account for 48% of global revenues, while the top twenty countries represent 77% of the global market. However, the industry is becoming slightly more dispersed over time. In 2017, 18 countries had annual spa revenues exceeding $1 billion, and Indonesia and Australia each surpassed the $1b threshold for the first time.

Spa Facilities by Region, 2017

Number of spas and spa facility revenues



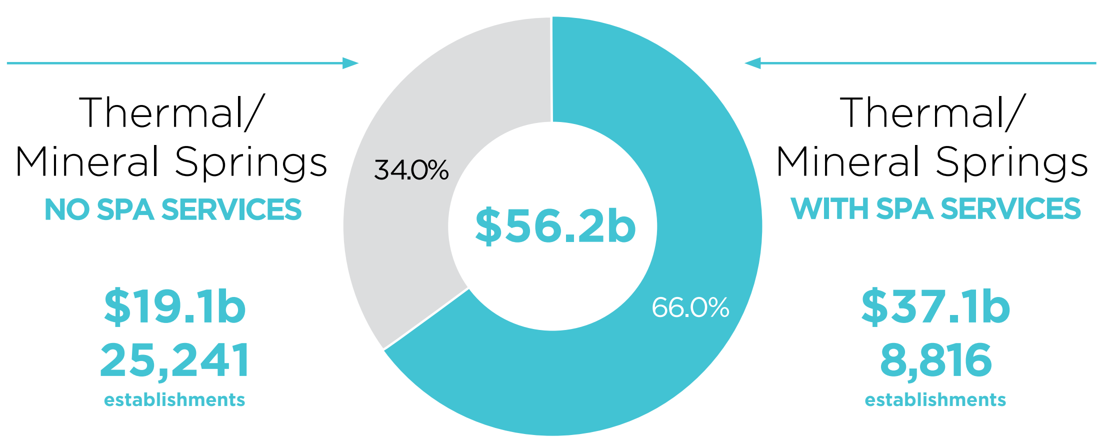
Source: Global Wellness Institute.

The $56 billion thermal/mineral springs industry has continued its strong growth as consumers turn to water for relaxation, community, and healing.

GWI defines the thermal/mineral springs industry as encompassing ***revenue-earning business establishments associated with the wellness, recreational, and therapeutic uses of waters with special properties.*** Consistent with that definition and previous methodologies, we estimate that there are 34,057 thermal/mineral springs establishments operating in 127 countries. These businesses earned $56.2 billion in revenues in 2017, and they employed an estimated 1.8 million workers.

The majority of thermal/mineral establishments around the world are rustic and traditional bathing and swimming facilities. They target their local markets and charge relatively low admission fees. About a quarter of the establishments are higher-end, targeting tourists and offering value-added spa services. Those that offer spa services account for a much greater share of industry revenues (66%), and also experienced higher revenue growth (7.4% average annual growth versus 0.5% for those without spa services, over 2015-2017).

Thermal/Mineral Springs Industry in 2017



Note: The thermal/mineral springs revenue estimates include all revenues earned by these establishments, from bathing/swimming offerings, spa/wellness services and other treatments, other recreational activities, food & beverage, lodging, and other services. See Appendix A for additional definitions and descriptions of categories.

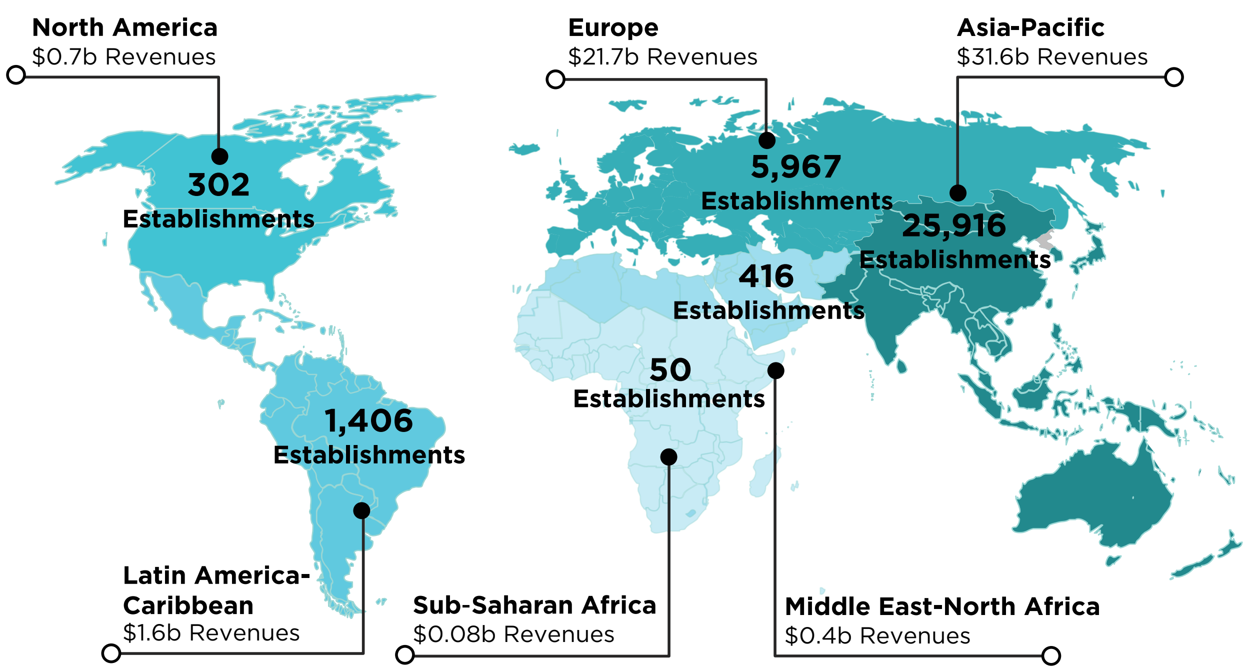
Source: Global Wellness Institute

The thermal/mineral springs industry is heavily concentrated in Asia-Pacific and Europe, reflecting the centuries-old history of water-based healing and relaxation in these two regions. Together, Asia-Pacific and Europe account for 95% of industry revenues and 94% of establishments.

Thermal/mineral springs bathing experiences appeal to a growing segment of consumers who are seeking to connect with nature, experience cultural traditions, and pursue alternative modalities for healing, rehabilitation, and prevention. Responding to these trends, both private investors and governments across many countries are investing in the sector. In countries with long-established thermal bathing traditions, governments are increasingly promoting these as a key wellness tourism offering. They are investing in renovation and reopening of primitive, outdated, and closed-down facilities, as well as upgrading service standards and training to meet the expectations of international tourists.

Thermal/Mineral Springs by Region, 2017

Number of thermal/mineral springs establishments and revenues



Source: Global Wellness Institute.

GWI predicts that the wellness economy will continue to grow at a healthy pace over the next five years and will expand its share of the global economy.

Within a relatively short span of time, wellness as a holistic concept has become more broadly understood and adopted all around the world. And there is no sign that this movement is slowing down. For the next five years, GWI projects robust growth in the five wellness sectors we track in detail (see table below), based on our own data sources and estimation models. We also believe the three sectors that represent the three core spheres of life will have the strongest growth – *wellness real estate*, *workplace wellness*, and *wellness tourism* – while the other wellness sectors will continue to grow as they support the integration of a wellness lifestyle into all aspects of our daily lives.

Wellness Sector Growth Projections, 2017-2022

	Projected Market Size (US$ billions)		Projected Average Annual Growth Rate
	2017	2022	2017-2022
Wellness Real Estate	$134.3	$197.4	8.0%
Workplace Wellness	$47.5	$65.6	6.7%
Wellness Tourism	$639.4	$919.4	7.5%
Spa Facilities	$93.6	$127.6	6.4%
Thermal/Mineral Springs	$56.2	$77.1	6.5%

Source: Global Wellness Institute estimates, based upon economic and industry sector projections from the IMF, ILO, Euromonitor, and GWI's data and projection model

However, an industry that focuses primarily on the wealthiest customers is addressing a limited market and may face a backlash.

As the wellness economy grows, there is simultaneously a growing perception that most of the latest products, services, technologies, and innovations are catering to the wealthiest consumers. For the wealthy, there are now a plethora of options – superfoods, boutique studios, wellness resorts, alternative healing modalities, DNA testing, sleep aids, micro-procedures, injectable/edible substances, gadgets, and more – to aid in their quest to feel good and be "forever young," or better yet, immortal. Meanwhile, income inequality is rising across the world, and poor people are growing sicker and more depressed, and are dying younger than those who are more well off.

So, it is not surprising that global conversations about wellness mirror this bifurcation of wealth and wellbeing. On one end, there is an intense race to promote the latest, most exclusive, and sophisticated offerings to the wealthy, such as housing, vacations, technologies, experiences, lifestyles, and even life transformations. On the other end, there is a media ready to ridicule and vilify the latest wellness businesses, modalities, and innovations as yet another sign that the privileged "one-percenters" are narcissistic and out of touch with the rest of humanity. In a free market, it is a business's prerogative to pursue whichever consumer markets and segments they consider promising and profitable. Collectively, however, the wellness market will not be healthy and sustainable if this polarization continues or worsens, possibly leading to a stagnant or shrinking customer base.

Focusing on the "we" of wellness can be a winning value proposition for customers, employees, investors, and other stakeholders.

One consistent finding from our ten years of wellness economy research – from wellness tourism and workplace wellness to wellness communities and lifestyle real estate – is the evolution of wellness from a personal aspiration to an emerging value system that recognizes our connection to the collective. Our individual health and wellbeing are inextricably linked to the wellbeing of other people, our communities, and the planet. We cannot be truly well if we confine our existence to a personal wellness bubble. For wellness economy businesses, this means more than philanthropy or corporate social responsibility. In the marketplace, customers increasingly make decisions based on emotions and their value systems: Does the brand story resonate with what I care about? What are the environmental and social consequences of my purchase? A company whose true compass is wellbeing for all delivers a much more powerful emotional story that will appeal to this growing segment of consumers.

At the same time, widespread disengagement has left a vast majority of the global workforce feeling disaffected, unmotivated, and unhappy at work – threatening business competitiveness and success. Research has shown that our discretionary efforts are tied to our intrinsic motivations, which, in turn, are driven by a sense of purpose, autonomy, personal growth, and teamwork. This is reinforced by findings from an expanding field of happiness research: We are much more likely to feel happy and fulfilled when we give, help others, contribute to something larger than ourselves, and feel that the world is fair. Companies whose mission is to bring wellness to the people who need it the most – rather than targeting the privileged few – will offer a more compelling case for their teams to infuse their daily work with meaning and purpose. Ultimately, it is the creativity, passion, energy, and commitment of motivated people that will deliver for customers, business owners, and investors.

Global Wellness Economy Highlights (2017)

Wellness Real Estate

Wellness Real Estate Market:
$134.3 billion (6.4% CAGR from 2015-2017)

Wellness Lifestyle Real Estate (Residential) Project Pipeline:
over 740 projects in 34 countries

Workplace Wellness

Number of Workers with Access to Workplace Wellness Programs & Services:
321.7 million (9.8% of employed workers)

Expenditures on Workplace Wellness:
$47.5 billion (4.8% CAGR from 2015-2017)

Wellness Tourism

Number of Wellness Trips:
830.0 million (9.6% CAGR from 2015-2017)

Wellness Tourism Expenditures:
$639.4 billion (6.5% CAGR from 2015-2017)

Average Expenditure per Trip:
$1,528 for intl./inbound (53% premium);
$609 for domestic (178% premium)

Spas

Number of Spas:
149,252 (10.8% CAGR from 2015-2017)

Spa Revenues:
$93.6 billion (9.9% CAGR from 2015-2017)

Spa Employment:
2,594,507 (9.8% CAGR from 2015-2017)

Thermal/Mineral Springs

Number of Thermal/Mineral Springs Establishments:
34,057 (11.3% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Revenues:
$56.2 billion (4.9% CAGR from 2015-2017)

Thermal/Mineral Springs Establishment Employment:
1,772,775 (13.1% CAGR from 2015-2017)

WELLNESS LIFESTYLE REAL ESTATE

Wellness real estate is a fast-growing $134b industry, buoyed by rising health consciousness and a desire to bring wellness into the places where we spend the majority of our time.

GWI estimates that the global wellness real estate sector is worth $134 billion in 2017, growing at 6.4% annually since 2015. For comparison, this is about 1.5% of the total annual global construction market and about half the size of the global green building industry.[25] GWI defines wellness real estate as ***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.*** Note that *wellness real estate* is broader than (but encompasses) *wellness lifestyle real estate,* which focuses on the residential component and is the primary focus of this chapter.[26]

Wellness Real Estate Market by Region, 2015 and 2017

	Wellness Real Estate Market (US$ billions)	
	2015	2017
North America	$47.94	$54.84
Asia-Pacific	$40.66	$46.78
Europe	$29.05	$31.73
Middle East-North Africa	$0.46	$0.51
Latin America-Caribbean	$0.35	$0.36
Sub-Saharan Africa	$0.09	$0.10
Total Wellness Real Estate Industry	**$118.56**	**$134.32**

Note: Figures may not sum to total due to rounding. Source: Estimates by the Global Wellness Institute, based upon construction industry data from the United Nations

[25] U.S. Green Building Council (2015). *The Business Case for Green Building.* https://www.usgbc.org/articles/business-case-green-building.

[26] Because it is impossible to separate out the residential and non-residential components in commercial/institutional projects (e.g., mixed-use, hospitality, etc.), GWI estimates *wellness real estate* in aggregate, although the focus of this chapter is on the residential component or *wellness lifestyle real estate*.

Around the world, there is rising consumer interest in extending our wellness experiences from our vacation destinations and leisure activities to our homes and everyday lives. A number of destination spas and wellness resorts are adding a residential component for customers looking for second homes, vacation properties, or to live a full-time wellness lifestyle. Upscale residential projects are adding wellness components to appeal to high-income buyers/renters. Demand also comes from the middle and upper-middle income markets for homes and neighborhoods that support a healthy lifestyle. Increasingly, there are projects in the affordable and lower-income segment, where buildings are incorporating wellness design features to address crucial public health needs, often in collaboration with public policy initiatives.

Overall, the wellness real estate market is heavily concentrated in North America, Asia, and Europe. The United States, along with a few key countries in Asia (China, Australia, India) and Europe (United Kingdom, Germany), account for three-quarters of the industry.

Top Twenty Wellness Real Estate Markets, 2017

	Wellness Real Estate Market (US$ millions)	**Rank in 2017**
United States	$52,481.2	**1**
China	$19,939.6	**2**
Australia	$9,471.4	**3**
United Kingdom	$9,016.4	**4**
Germany	$6,439.9	**5**
India	$6,088.3	**6**
France	$5,814.5	**7**
South Korea	$4,194.8	**8**
Canada	$2,355.1	**9**
Japan	$2,246.4	**10**
Netherlands	$1,850.5	**11**
Switzerland	$1,607.0	**12**
Norway	$1,216.7	**13**
Sweden	$1,139.9	**14**
Austria	$1,099.1	**15**
Italy	$1,001.0	**16**
Malaysia	$917.1	**17**
Singapore	$818.7	**18**
New Zealand	$802.6	**19**
Taiwan	$652.0	**20**

Source: Estimates by the Global Wellness Institute, based upon construction industry data from the United Nations

Investment in our homes should also be a strategic investment in our health.

For most people, our home represents our most important personal investment and one of our largest expenditures (about 20% of all consumer spending, or more than $9 trillion in 2017[27]), so it is only logical that our home should also be an investment in our health and wellbeing. Yet, wellness lifestyle real estate is a nascent industry that is not well understood by consumers, real estate developers, and investors. In the 2018 GWI research report, *Build Well to Live Well,* we developed definitions for *wellness lifestyle real estate* and *wellness communities* to promote better understanding of this important sector.

Defining *Wellness Lifestyle Real Estate* and *Wellness Communities*

Wellness lifestyle real estate is defined as homes that are proactively designed and built to support the holistic health of their residents.

Wellness community is a group of people living in close proximity who share common goals, interests, and experiences in proactively pursuing wellness across its many dimensions. It can be rooted in a purpose-built physical space, or it can be cultivated around shared culture or social networks without purpose-built structures.

The power of wellness lifestyle real estate lies in its potential to foster wellness communities. However, to do so requires a clear intention, along with supporting design and operational principles:

- **From "do no harm" to optimizing wellness:** Not only preventing sick buildings but intentionally building homes that help us enhance our health and wellbeing.
- **From passive to active wellness:** Encouraging proactive behaviors and habits that drive wellness.
- **From hardware to software:** Complementing bricks and mortar with policies, management, and programing that build social connections and nurture healthy behaviors.
- **From "me" to "we:"** Creating awareness that our individual health and wellbeing is intrinsically linked to our broader environment and the social fabric around us.

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[27] Global Wellness Institute analysis of global consumer expenditures data from Euromonitor International.

Consumers are demanding healthier built environments and are willing to pay more for them.

GWI's review of more than 220 academic, peer-reviewed, and independent studies found solid evidence that homebuyers are willing to pay more for wellness-enhancing features, including:[28]

- **Proximity and easy access to high-quality natural and recreational amenities:** Price premiums of 3-12% for nearby open space, greenbelts, and conservation areas; 4-20% for nearby parks and multi-use trails; and 5-15% for recreational programming and amenities within the community (e.g., fitness centers, swimming pools, golf courses, etc.).
- **New Urbanist features such as mixed-use, higher-density, transit-oriented, and traditional neighborhood design:** Price premiums of 5-20% across the United States.
- **Neighborhood walkability:** Price premiums of $4,000-$34,000 for above-average walkability, or a 1% increase in home price for every one-point increase in a neighborhood's walkability score in the United States.[29]
- **Sustainability features:** Price premiums of 1-10% for homes with green certification labels and energy-efficient features.
- **Healthy home features:** Recent surveys in the United States, United Kingdom, India, and China indicate strong consumer demand, with a range of 30% to nearly 90% of surveyed consumers indicating a willingness to pay extra for a healthier home.

GWI estimates that wellness lifestyle real estate and community projects positioned at the middle and upper ends of the market are currently achieving **price premiums of 10-25%**. One reason for this premium is that there is not enough supply to meet demand. Based on a survey conducted by the market research firm American LIVES Inc., GWI estimates that there are **1.3 million potential buyers each year in the United States** alone for wellness-infused homes and communities.[30]

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[28] GWI synthesis of data, based on a literature review of 220 scholarly articles, peer-reviewed studies, and independent reports, spanning more than 20 countries. For more information, see Global Wellness Institute (2018). *Build Well to Live Well: Wellness Lifestyle Real Estate and Communities.*

[29] See: Cortright, J. (2009). *Walking the Walk: How Walkability Raises Home Values in U.S. Cities.* Cleveland, OH: CEOs for Cities. Bokhari, S. (2016). How Much is a Point of Walk Score Worth? *RedFin Real Estate News & Analysis.*

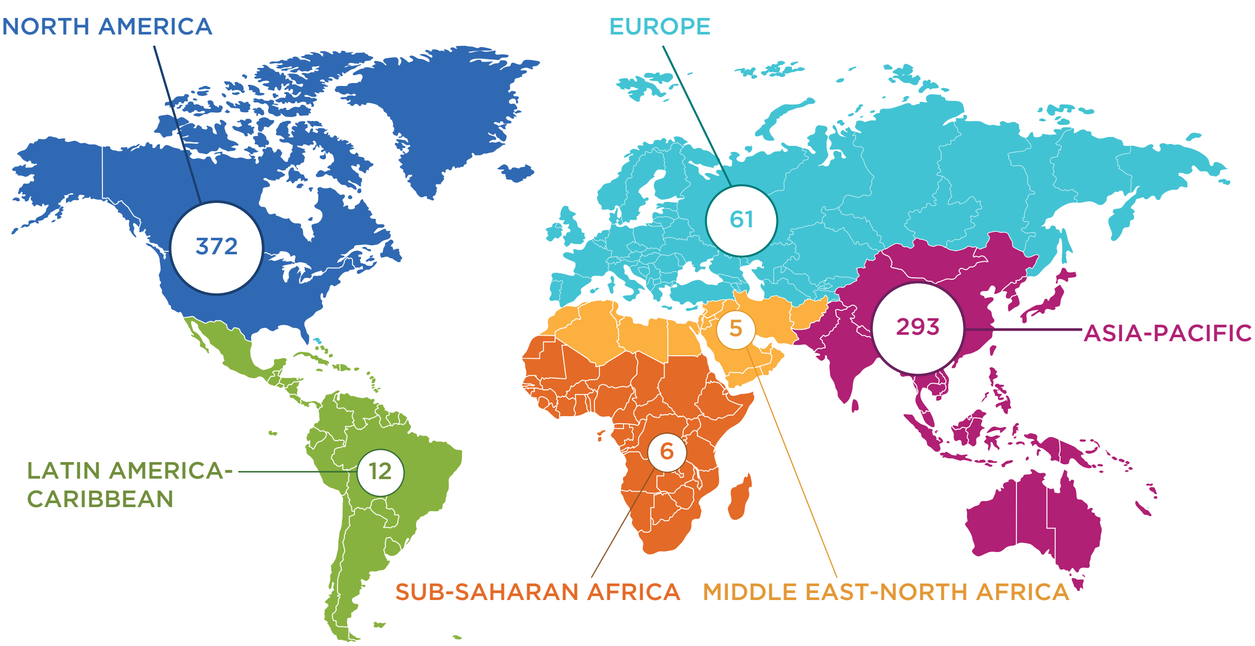
[30] See: Global Wellness Institute (2018). *Build Well to Live Well: Wellness Lifestyle Real Estate and Communities.*

As the global pipeline of wellness lifestyle real estate projects grows, there is enormous potential for differentiation based on market needs, specific preferences, and unique site characteristics.

GWI's research found more than 740 wellness lifestyle real estate and community developments built, partially built, or in development, across 34 countries (as of November 2017), and this number is growing every day. These include master-planned communities, multi-family housing, urban districts and mixed-use projects, resort- and spa-based real estate, and other types of projects around the world.

Wellness Lifestyle Real Estate Pipeline in 2017:

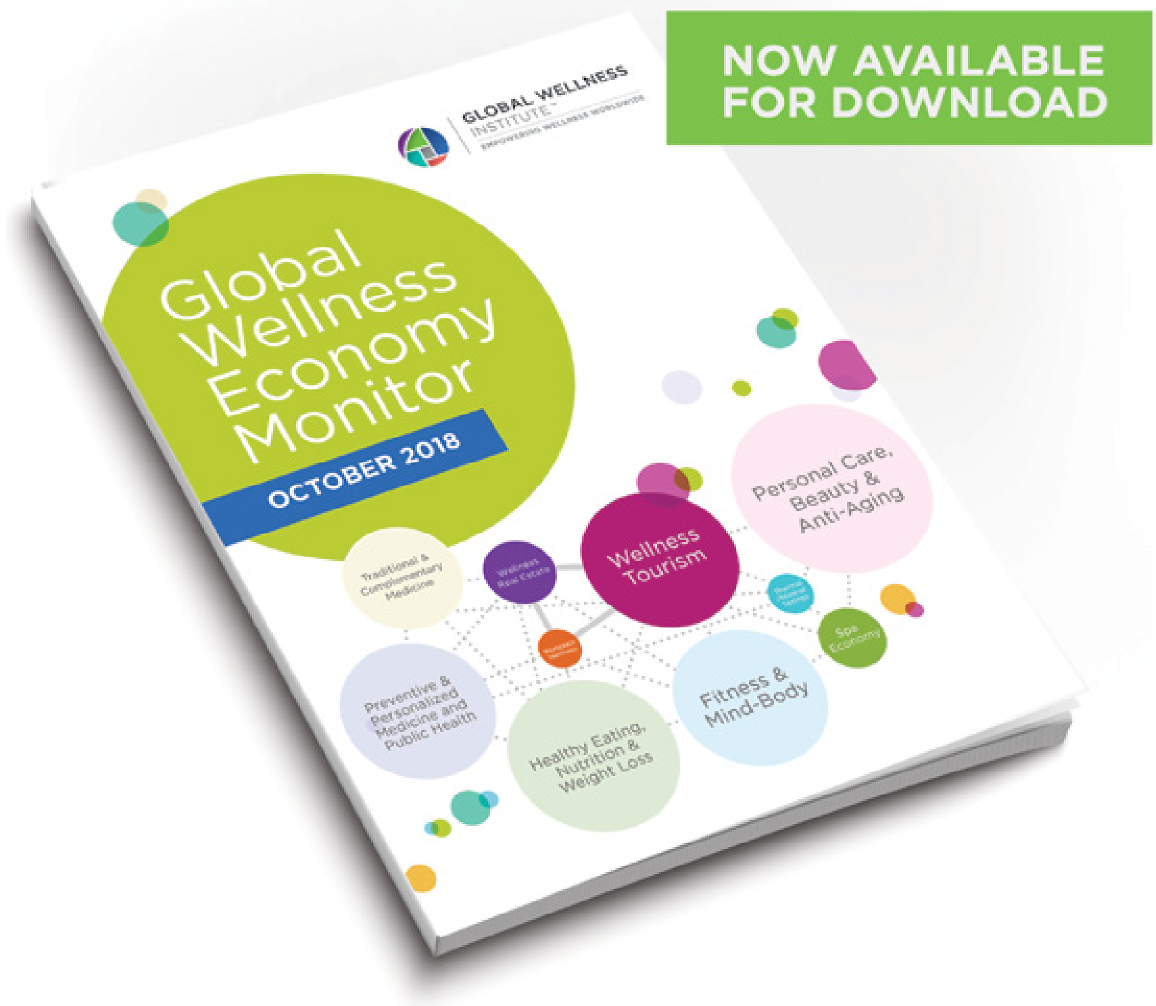
Over **740** projects across **34** countries



Note: Estimates as of November 2017. Source: Global Wellness Institute.

Looking to the future, GWI has identified several emerging wellness living concepts that we predict will drive the future development of wellness lifestyle real estate and will push the design of healthy living environments to the next level:

- **Blurring the lines between home, work, and leisure:** Strategic colocation and integration of homes, coworking facilities, and ample wellness amenities and programming (in both urban and suburban contexts), in response to the rapid rise of remote work, sharing economy, and the travails of loneliness and work-life balance.
- **Making healthy homes affordable:** Developers collaborating with governments to target lower-income and vulnerable populations who are at the highest risk for many health conditions.
- **Bringing back multigenerational and diverse neighborhoods:** Catering to people seeking communities with greater diversity of ages, life stages, backgrounds, and social classes, recognizing the growing evidence that social connections in the physical realm are essential for our health and wellbeing, our society, and our economy.
- **Catalyzing medical industry clusters and health services to build wellness communities:** Building world-class wellness communities by creating a geographic concentration of cutting-edge medical industry companies and research organizations (the economic concept of industry clusters); a concentration of high-quality hospitals, clinics, and health services for consumers; and holistically-designed wellness-infused homes and neighborhoods.
- **Moving from green to regenerative living:** Moving beyond green building certifications to create innovative, regenerative residential communities on the cutting edge of green, biophilic, sustainable, and healthy design. These communities will produce their own healthy food and renewable energy, clean the air, recycle their own water, and be net positive for people and planet.
- **Leveraging technologies to create smart-healthy homes and cities:** Harnessing future technologies (advanced telemedicine, smart homes, sensors, artificial intelligence, etc.) to bring state-of-the-art on-demand wellness into the design of homes, neighborhoods, and cities.
- **Rediscovering hot springs as a wellness living anchor:** A rise of new residences located near natural thermal and mineral springs (both primary and vacation homes) – as people rediscover their therapeutic properties and the benefits of communal bathing – and the redevelopment of historic spa towns as holistic wellness living communities.



To download the full
Global Wellness Economy Monitor report, visit:

GLOBALWELLNESSINSTITUTE.ORG

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APPENDIX F

ECONOMIC CLUB OF CANADA

November 12th 2020

Re: Consultation Request

Dear Madeleine Marentette,

It is with great enthusiasm, that I request your consultation services for an exciting project development that I am currently supporting.

The Economic Club of Canada has been facilitating an early-stage capital raise for a traditional indigenous healing lodge and wellness retreat centre that will be built on 55 acres at the Six Nations of The Grand River Indigenous Reservation in Ontario.

The Land of The Dancing Deer is a project that has been spearheaded by indigenous entrepreneur and medicine woman Gail Whitlow. We are currently seeking your consultation services, as a recognized expert in holistic wellness and retreat design. I have had the immense privilege of attending Grail Springs Retreat for Wellbeing on a number of occasions and have been utterly impressed with your retreat design, programming, and the overall wellness experience you have created for guests.

As you know, mental health and wellbeing are critical components of truth and reconciliation efforts across Canada. We believe that The Land of The Dancing Deer will be a positive support for local community, and an opportunity for all peoples to participate in holistic wellness experience infused with traditional indigenous healing modalities. Your experience and expertise from creating the award-winning Grail Springs Retreat will provide us with an invaluable opportunity to create something of real value on Six Nations.

We look forward to connecting further about this opportunity and welcoming you to our consultation team.

Sincerely,

R Rosalind.

Rhiannon Rosalind
President & CEO
The Economic Club of Canada

APPENDIX G

Grail Springs - Sample Daily Scheduled Classes:


Yoga & Meditation – Every Monday, Tuesday, Friday, Saturday


Guided Hikes through Trail of Dreams to Crystal Crop Mound – Every Monday, Saturday

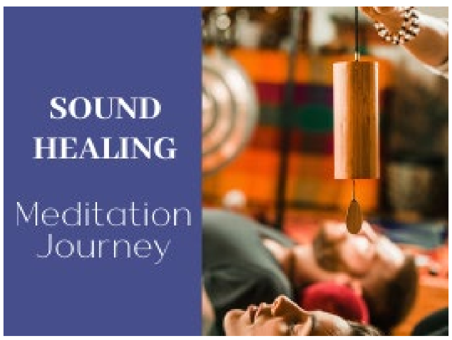
'Detox Your Mind' Friday Meditation with Tanya Mahar 5:15-6pm
Apr 23rd
So you've just arrived at Grail Springs after a long and well-deserved wait. Let's begin your wellness journey with meaningful Zen-time. Tanya Mahar is a seasoned Mindfulness Meditation Instructor and will help you clear your mind and open up to receiving the peace and tranquility coming your way!

Exploring Nature's Wisdom ~ with Mary-Catherine Waymouth & Richard Capener 7pm
Apr 23rd-24th
Join us for a 2-part evening series as we examine the 'Wisdom of the Animal Kingdom' that empowers our evolving selves. Through discussions and group exercises, you will renew your relationship with Nature as you integrate these universal teachings and apply them to your daily life.

Gemstone Earth! Discover Your Personal Crystal Connection with Wendy Fouts Sundays 8:45am

Apr 25th

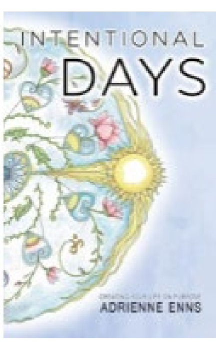
Located in the Mineral Capital of Canada, Grail Springs thrives on a unique crystal energy grid. Join a fascinating journey into this hidden world and learn about Earth's first passengers. Discover your own personal connections and how to enhance peace, love, grounding and abundance into your life!



Sound Meditation Journey to Soothe Your Body, Mind & Soul with Wendy Fouts 7pm

Apr 25th

Gather in the Great Hall following dinner, relax and let go. Cover up with a blanket and allow your mind and body to take in the 7 rhythmic songs specifically orchestrated to balance our chakra system. Your facilitator will enhance the experience with resonant sounds and aromas to sooth your soul.



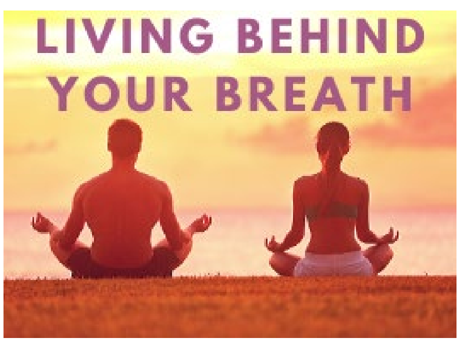
Intentional Living ~ with Author Adrienne Enns

Apr 26th-27th

Explore what brings you true joy in your life and how you can more consciously connect and create it every day. Adrienne will integrate mindfulness practices to cultivate awareness and set the intentions. Take home simple rituals to live intentionally and with purpose and joy each and every day.

The Strength of Our Stories ~ Wendy Fouts 7pm
Apr 28th-29th
A fascinating journey inward as we examine the stories we tell ourselves, about what and why we have experienced life the way we have. Unique to each of us, these self-reflections deliver new revelations, and truer tales that reveal the brighter and enlightened side our human experience.

Good Vibrations! ~ Morning Soundscape Circle 8:45am
Apr 29th
Sounds, tones and rhythms influences us physically, emotionally and spiritually. Spontaneous and intuitive, the magic of a moment when creating a Soundscape with others is something to be experienced. Join us on a sound-filled journey where we explore the meditative healing of our inner rhythm!



Living Behind Your Breath ~ with Hugh Perry 7pm
Apr 30th-May 1st
Let your Soul do the Walking and Talking. Appreciation of breath frees you from the intrusive thought, shifts identity to Soul-full existence and unlocks intuitive creativity. You will learn; Holding Presence in Self, Presence in Motion, and how to identify Who is Having the Experience!

Equine Therapy Meditation ~ with Richard Capener $80 pre-register (every Wednesday & Saturday)
May 1st
Just like service dogs, horses have a remarkable therapeutic effect on the human condition. This practice is a global movement, bringing us together in peace, harmony and healing with our animal companions. Weather permitting. Wear sunhat, closed shoes.


Creativity, Health & YOU! ~ with Resident Artist John Parson 7pm
May 3rd
Come allow yourself to reawaken or unblock your intuitive, creative side. In doing so, you can holistically balance yourself, and learn how to give your soul voice a vehicle for expression, and in turn transformation. Discover the creative in you or reignite the forgotten one!

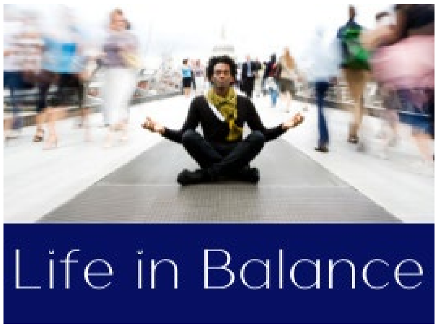
Her-Story His-Story; The Male Female Within All - Mary-Catherine Waymouth 7pm
May 4th
Travel through history, stories that teach us much about our past, present and future as we journey through this life. We will discuss how the male/female energies (non-gender) has played out in mythical themes such as Gods & Goddesses, inspiring Legends of Avalon and their relevance to us today.

Spiritual Enrichment Journey, First Tuesday to Friday Mornings each month with Laura Milcawich $300 pp
May 4th-7th
A series of four morning classes designed for six to eight people seeking to deepen their connection with their inner self. Through workshops and group discussions we tap in to our true nature and voice giving us a compass to follow as we move through life's journey with fulfillment and happiness.

The Noble Warrior ~ with Wendy Fouts 7pm
May 5th-6th
Reveal yourself through archetypal activation of warrior-ship, self-mastery and fearless living. Expose fear for what it is and learn to transform it. Our Self is waiting to support truths, values, desires and dreams. Discover where your power and freedom lie. Reveal your Noble Warrior!


Experiential Workshop Series – Every Thursday Morning
May 6th
Join a creative and fun journey each week with facilitator Wendy Fouts. Let go of physical and psychic tension. Reclaim your freedom and your brilliance. Each week Wendy shares from a variety of experiential workshops; '5RYTHUMS', 'WALKING THE SACRED LABYRINTH', 'SPIRIT OF THE WOODS'.

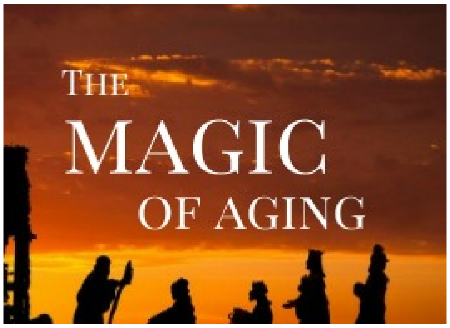
Friday Morning Fire Ceremony – Every Friday Morning
May 7th
Each Friday morning guests gather around the campfire to take part in a Grail Springs tradition. We call upon the four elements of Fire, Earth, Water & Air to support us in letting go of that which no longer serves, and to uphold us as we embrace new commitments to our self and our future.



Transmuting Stress to a Life in Balance ~ with Jason Secord 7pm
May 7th-8th
From stress to relaxation, join us for a weekend of quiet and calm through the art of relaxation and meditation. Utilizing principles of meditation, you'll learn techniques on how to decompress and relax into mind and body, opening the opportunity to release stress in your daily life.

Dream Keeping ~ with Mary-Catherine Waymouth 7pm
May 10th
Why have dreams been such a mystery for thousands of years? What makes dreams so intriguing to us? 'Dream Keeping' will give you answers and assist you in discovering through simple techniques, how to recall and interpret your dreams and the insightful gifts they bring to your life.

Shifting from Head to Heart ~ Brenda Peddigrew, PhD
May 11th
In our everyday lives we are engaged with details, noise, devices and other mind occupations. Learn a practice that will serve you well, to help you shift from mind to heart presence in the midst of your busy day. Ground your inner self and access your inner heart for your health & wellbeing.



The Magic of Aging ~ Joan Weir 7pm

May 12th-13th

Explore with Joan Weir the magic and mystery of aging consciously. Dispel limiting fears and discover the rich potentials when we open our minds to who we are yet to become! Using ceremony, story-telling, ritual and discussion to discover and embrace the magic of this precious stage of life.

Walking the Sacred Labyrinth ~ Thursday morning 8:45am

May 13th

Welcome to the Magical World of Labyrinths, a Universal Symbol for Transformation. Created in ancient times to represent humankind's search for the core of divinity, it is a powerful tool for reflection, meditation, healing, bringing calm and a deeper connection with one's Self. Discover ours!

The Life Practice of Meditation ~ with Tanya Mahar 7pm

May 14th-15th

The most important moments of a meditation practice are the ones that happen off of the cushion. Practical, effective mindfulness techniques will be explored that can be woven into ordinary daily activities - especially at times when they are needed most.

Restorative Breath, Yoga & Meditation ~ with Tanya Mahar 7pm
May 17th
Ease in to the day's end through calming breath practices, gentle seated yoga and a relaxing pre-bedtime meditation in the beautiful Great Hall with Tanya Mahar. Settle in, take a breath, let go, and unwind. Together we will craft a lullaby for the soul.

Kirtan with Sound & Energy Healer Shantdeep 7pm
May 19th
Canadian musician and singer-songwriter Shantdeep joins Grail Springs in the beautiful Great Hall to share the timeless, soul-moving experience of Kirtan. Join in the traditional chanting and song which will take you into a heart-opening space, to feel love, peace, oneness and joy.