INTELLIGENCE REPORT · GLOBAL WELLNESS INSTITUTE 2025

# THE REGIONAL WELLNESS GAP.

The Middle East & GCC is the fastest-growing wellness region on earth. The infrastructure is being built. The budgets are committed. The tourists are arriving. But the most valuable layer — the one that turns investment into measurable outcomes — barely exists.

**$339**

Per capita wellness spend in MENA & GCC — vs $831 global average. A 59% gap in human terms.

**$190B**

Total MENA & GCC wellness economy 2024 — yet only 2% of global wellness tourism spend.

**6.12%**

Wellness as share of global GDP — MENA is at 2%. GCC UAE at ~8%. A 3× structural gap.

Primary source: GWI Global Wellness Economy Monitor 2025
GWI Country Rankings 2026 · GWI Saudi Arabia 2024 · GWI UAE 2025

Published by The Wellness Creators
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GWI Wellness Real Estate Market 2026 · McKinsey · IMARC Group

THE ARGUMENT

# THE GAP THAT CHANGES EVERYTHING.

The Middle East and North Africa is the fastest-growing wellness region on earth. The total MENA wellness economy reached $190.1 billion in 2024, up from $134.2 billion in 2019. Saudi Arabia and the UAE rank number one and two globally for five-year wellness growth among all 145 countries tracked by the Global Wellness Institute. Yet MENA accounts for just 2% of global wellness tourism spend — and wellness represents only 2% of regional GDP against a global average of 6.12%.

That is not a failure. It is a structural gap. A 3× gap in a market growing at record speed, backed by the largest national transformation programmes in the region’s history.

The infrastructure is being built. Over 600 hotels with 140,000+ rooms are under development across the Middle East. MENA’s public health sector more than doubled since 2019, growing at 16% annually. Vision 2030 has lifted tourism’s contribution to Saudi GDP from 3% to 7%, with a 10% target by 2030.

The most telling number in all of the GWI data is not a growth rate. It is this: the average person in MENA spends $339 on wellness per year. The global average is $831. North Americans spend $6,029. The demand is there. The infrastructure is being built. The policy mandates are in place. What is missing is the activation layer — the strategy, the programming, the institutional frameworks that turn individual spending and government investment into a functioning, measurable wellness economy.

> *“The Middle East accounts for only about 2% of today’s booming global wellness market — yet it is the fastest growing region for wellness tourism spending globally.”*
>
> Global Finance Magazine · GWI Data 2025

The organisations that build the activation layer now — the strategy, the programming, the community design, the destination identity — will define the standard for the next decade.

WHAT THIS REPORT COVERS

01 — The global wellness picture and MENA’s position
02 — The per capita gap — the most human number
03 — Where MENA’s $190B actually goes
04 — Three sectors where the gap is largest

PRIMARY DATA SOURCE

All data sourced from:
GWI Global Wellness Economy Monitor 2025
GWI Country Rankings Report 2026
GWI Saudi Arabia Geography of Wellness 2024

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GWI Wellness Real Estate Market Report 2026

McKinsey Global Institute · IMF 2024

CHAPTER ONE

# THE GLOBAL WELLNESS ECONOMY IN 2025.

At $6.8 trillion, the wellness economy is larger than IT, tourism, sports and the green economy combined — and is growing at twice the rate of global GDP.

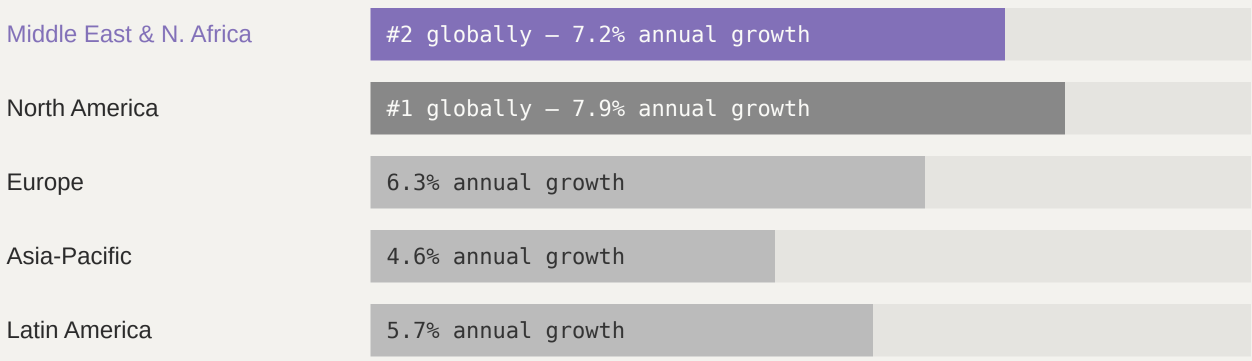
**$6.8T**
Global wellness economy 2024 — a record high
GWI Monitor 2025

**7.9%**
Annual growth 2023–2024 — double global GDP growth
GWI Monitor 2025

**$9.8T**
Projected size by 2029 — adding $3 trillion in five years
GWI Forecast 2025

The wellness economy now represents 6.12% of global GDP. All eleven sectors have exceeded pre-pandemic levels. MENA exceeded its 2019 wellness economy levels by over 35% as of 2024 — matching North America and Europe as the strongest regional recoveries globally.

WELLNESS ECONOMY GROWTH BY REGION — 5-YEAR ANNUAL AVERAGE (2019–2024)




Source: GWI Global Wellness Economy Monitor 2025 · MENA total economy: $190.1B (2024)

MENA & GCC BY THE NUMBERS

## MENA & GCC by the numbers

The UAE and Saudi Arabia rank number one and two globally among all 145 countries for five-year wellness growth. The UAE grew at 14.3% annually — a market nearly twice its 2019 size, now ranked 26th globally. Saudi Arabia grew at over 11% annually. MENA & GCC grew 8.5% in 2023–2024 alone.

## Five standout sectors

**Wellness tourism** expenditures grew 15% annually (201% of 2019 levels).

**Mental wellness** grew 14.1% in 2023–2024 — highest of any region globally.

**Spas** grew 13.2% annually — also the highest globally.

**Public health** grew 16% annually — doubled since 2019.

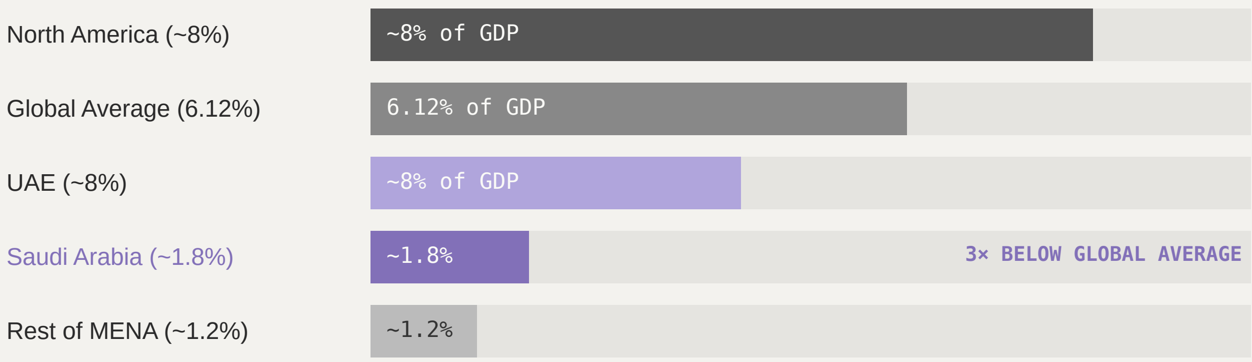
**Real estate** grew 22.6% annually. Every sector growing. Activation strategy still missing.

CHAPTER TWO

# THE GAP REVEALED.

Two numbers define the gap. One is structural — wellness as a share of GDP. One is human — per capita spending. Both tell the same story: MENA is growing faster than anywhere on earth but capturing far less value per person than the data says it should.

WELLNESS AS % OF GDP — REGIONAL COMPARISON (GWI 2025)




Source: GWI 2025–2026 · GDP figures: IMF 2024 · Analysis: The Wellness Creators

THE MOST HUMAN NUMBER IN THIS REPORT — PER CAPITA WELLNESS SPEND 2024

**$6,029**
Per capita wellness spend
North America

**$831**
Per capita wellness spend
Global average

**$339**
Per capita wellness spend
MENA — 59% below global avg

This is not a market data problem. It is an activation problem. MENA residents are spending $339 per person because the institutional infrastructure — the workplace programmes, the community wellness frameworks, the destination strategies — that drives per-capita spending in mature markets does not exist at scale in this region. The demand is there. The budgets are being allocated. The activation layer is what is missing.

# WHERE MENA’S $190 BILLION ACTUALLY GOES.

The gap becomes clearest when you map where the region’s $190 billion wellness economy is concentrated today — and where the activation infrastructure is almost entirely absent.

| INDIVIDUAL CONSUMPTION — WHERE SPENDING ALREADY FLOWS | |
|---|---|
| Personal Care & Beauty | $60.8B |
| Healthy Eating & Nutrition | $36.9B |
| Physical Activity | $31.7B |
| Mental Wellness | $6.0B |
| Traditional Medicine | $1.2B |
| Subtotal | ~$136B |

| INSTITUTIONAL ACTIVATION — WHERE THE GAP IS | |
|---|---|
| Public Health & Prevention | $19.4B |
| Wellness Tourism | ~$24.7B |
| Spas | ~$4.0B |
| Wellness Real Estate | $1.96B |
| Workplace Wellness | ~$1.5B |
| The activation gap | Budgets exist. Strategy missing. |

Nearly 70% of MENA’s $190 billion wellness economy flows into personal consumption — beauty products, food, fitness and individual spending categories where the culture of wellness is already established. The institutional layer is a fraction of this. Workplace wellness represents less than 1% of the total MENA wellness economy, despite Saudi Arabia and the UAE both growing this sector while the rest of the world contracts. Public health has more than doubled — but that growth is concentrated in clinical and medical infrastructure, not in community activation and programming. Wellness tourism is growing at 15% annually yet MENA holds only 2% of global wellness tourism spend because the destination activation strategy that creates premium value and repeat visitors is almost entirely missing from the market.

> *CThe money is already flowing. The gap is in who organises it, programmes it and activates it at an institutional level.D*
>
> Cherine Noueihed · The Wellness Creators 2026

CHAPTER FOUR

# THREE SECTORS WHERE THE GAP IS LARGEST.

Every sector in MENA shows the gap between growth rate and institutional activation. These three stand out as the most underserved — and the most commercially ready.

01

DESTINATION & TOURISM

## The infrastructure is built. The experience layer is missing.

MENA wellness tourism grew 15% annually from 2019–2024 and has recovered to 201% of 2019 levels — the fastest post-pandemic recovery globally. The UAE is now ranked 16th globally with $11.3 billion in wellness tourism spend at 37.7% annual growth. Saudi Arabia's wellness tourism market is $9 billion and growing at record rates. Yet MENA holds only 2% of global wellness tourism spend. The gap is not in buildings. It is in the activation strategy, cultural identity and destination programming that turns a hotel stay into a wellness destination that visitors return to. 600+ hotels are under development. Almost none have an activation strategy built.

| $11.3B | 201% | 2% |
|---|---|---|
| UAE wellness tourism — #16 globally, 37.7% annual growth | MENA post-pandemic recovery — fastest of any region globally | MENA share of global wellness tourism — despite being fastest-growing |

02

CORPORATE & MENTAL WELLNESS

## The fastest-growing wellness sector in MENA. The least activated.

Mental wellness grew 14.1% in MENA in 2023–2024 — the highest growth rate of any region globally for this sector. The MENA mental wellness market reached $6.03 billion in 2024. Yet only 9.55% of employed workers in MENA have access to any workplace wellness programme, versus 46% in North America and 28% in Europe. McKinsey data shows 36% of GCC employees plan to leave their jobs due to mental health struggles — more than double the global average of 16%. Saudi Arabia and the UAE are both growing their workplace wellness markets against a global trend of decline, with structured wellness generating a documented 6:1 ROI.

| 14.1% | 9.55% | 6:1 |
|---|---|---|
| MENA mental wellness growth 2023–24 — highest of any region globally | MENA workers with workplace wellness access — vs 46% North America | Average ROI on structured workplace wellness investment globally |

03

COMMUNITY & GOVERNMENT

# Government spending has doubled. Community wellness barely exists.

MENA's public health sector grew from $9.2 billion in 2019 to $19.4 billion in 2024 — more than doubling at 16% annually. Saudi Vision 2030, the UAE National Strategy for Wellbeing 2031 and Qatar National Vision 2030 all identify quality-of-life as central. AMAALA alone projects a $3 billion GDP contribution. But the gap between a national strategy and a community that actually feels its effects requires operational expertise, cultural intelligence and programme design that sits almost entirely outside the current market. Government spending has doubled. The activation frameworks to deploy it effectively have not been built.

**2×**

MENA public health spending has more than doubled since 2019

**3→10%**

Tourism share of Saudi GDP under Vision 2030 — QoL at the heart of it

**2031**

UAE National Strategy for Wellbeing deadline — tenders accelerating

CHAPTER FIVE

# WHY THE WINDOW IS NOW.

The gap closes over the next five years. The organisations that position inside it now will define the standard for the next decade. The ones that wait will pay more to follow.

Infrastructure surge, policy activation, record government budgets and a per-capita spending base 59% below the global average and accelerating — these conditions exist simultaneously for the first time in the region's history.

- Now — Infrastructure entering delivery phase: 600+ hotels, NEOM, Red Sea Global, AMAALA. Mental wellness growing at 14.1%. All need activation strategy.
- 2026–27 — Policy activation: UAE Wellbeing 2031 and Saudi Vision 2030 entering implementation phase. Public health budgets doubled. Government tenders opening.
- 2027–29 — Market convergence: Per-capita spending begins closing toward global norms. MENA's 7.2% growth compounds. Positioned organisations own the relationships.
- 2030 — Standard is set: The organisations that built the activation layer own the credibility and the revenue. The market is no longer open to new entrants at the same terms.

CHAPTER SIX

# WHAT FILLING THE GAP LOOKS LIKE.

DESTINATION

### A Red Sea development with world-class architecture and no wellness identity.

Wellness tourists return to places with a cultural story, local healing traditions, seasonal programming and community connection. The UAE's rise to 16th globally at $11.3 billion happened because destination identity was built deliberately. Every giga-project entering the market still needs this layer built.

CORPORATE

### A GCC bank where 36% of employees plan to leave due to mental health struggles.

Mental wellness is MENA's fastest-growing sector but only 9.55% of workers have access to structured programmes. A corporate wellness strategy that connects to business metrics — reducing attrition, improving

CORPORATE

## A GCC bank where 36% of employees plan to leave due to mental health struggles.

Mental wellness is the fastest-growing sector in MENA & GCC, but only 9.55% of workers have access to structured programmes. A corporate wellness strategy that connects to business metrics — reducing attrition, improving output, generating the documented 6:1 ROI — is precisely what the data demands and what the market has not yet delivered.

GOVERNMENT

## A municipality with a QoL mandate, a doubled public health budget — and no activation framework.

Governments across MENA & GCC have more than doubled their public health spending. The money is allocated. What is missing is the programme design that turns infrastructure into participation — the women's wellness economy model, the community engagement strategy, the activation framework that makes residents actually feel the quality-of-life improvement the policy promises.

INTELLIGENCE · INNOVATION · STRATEGY · ACTIVATION

# THE WELLNESS CREATORS.

The first wellness intelligence house built to close the MENA & GCC wellness gap — across destinations, governments, corporates, communities and institutions. Founded by **Cherine Noueihed**: fifteen years of operational intelligence from inside royal households, governments and landmark developments across Saudi Arabia, the GCC and Australia.

## WHAT'S NEXT

### Wellness Activation Score™ — **Free**

A 10-minute diagnostic of how ready your institution is to turn wellbeing intention into measurable impact. → thewellnesscreators.com/score

### The Regional Wellness Gap Report — **Free**

This report. Read it, share it — the market is already moving.

### Corporate Wellness ROI Calculator — **$30**

The cost of inaction and your projected ROI, with a ready business case for leadership.

### Q4 Wellness Intelligence Brief — **$40 · Annual $132/yr**

Nine-country deep dives across MENA & GCC and the quarterly opportunity register.

### The Wellness Funding Directory — **$20**

Live wellness-eligible funding across government, development, CSR and tourism — mapped by type and region.

*Start the conversation.*

contact@thewellnesscreators.com