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NOVEMBER 2020

Defining the Mental Wellness Economy

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November 2020

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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.

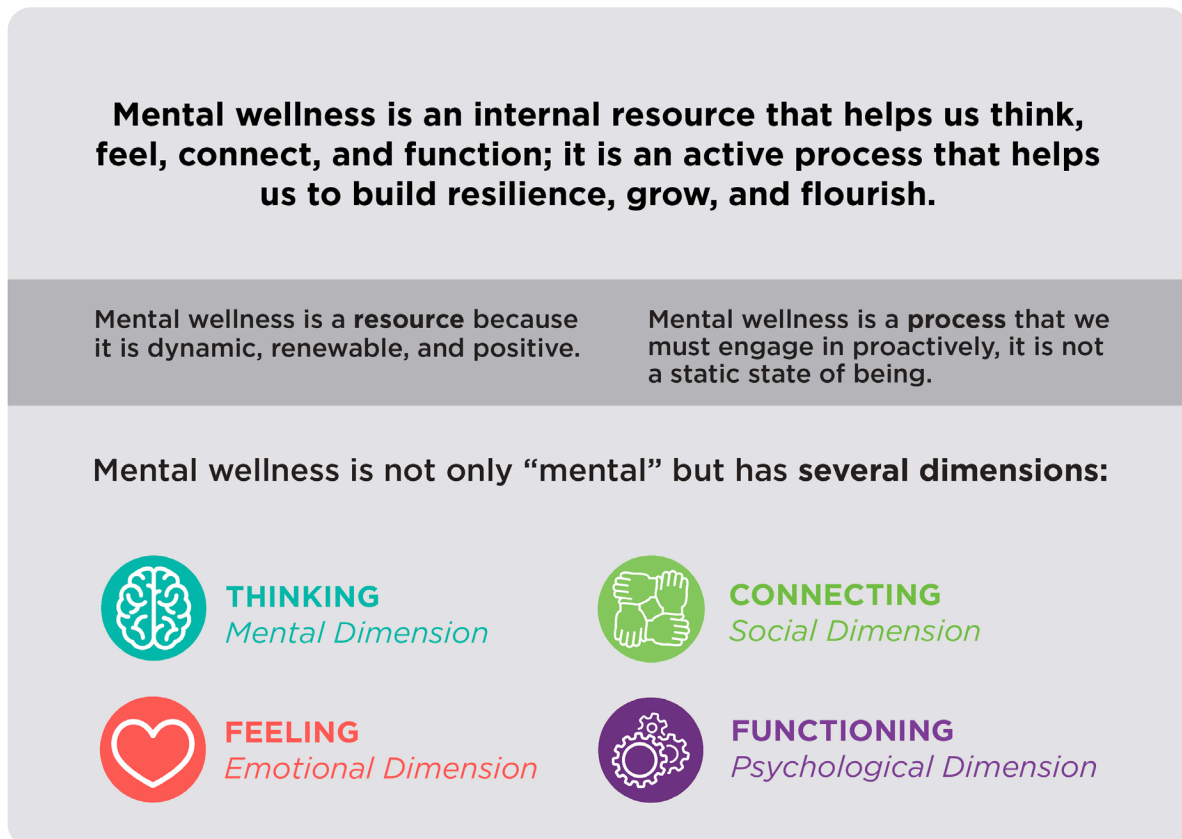
Our mental unwellness has been a growing public health crisis for some time. Over 15% of the global population suffers from mental and substance use disorders.¹ Dementia is on the rise; happiness is on the decline in many countries; and stress, worry, sadness, burnout, and loneliness are increasing all 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



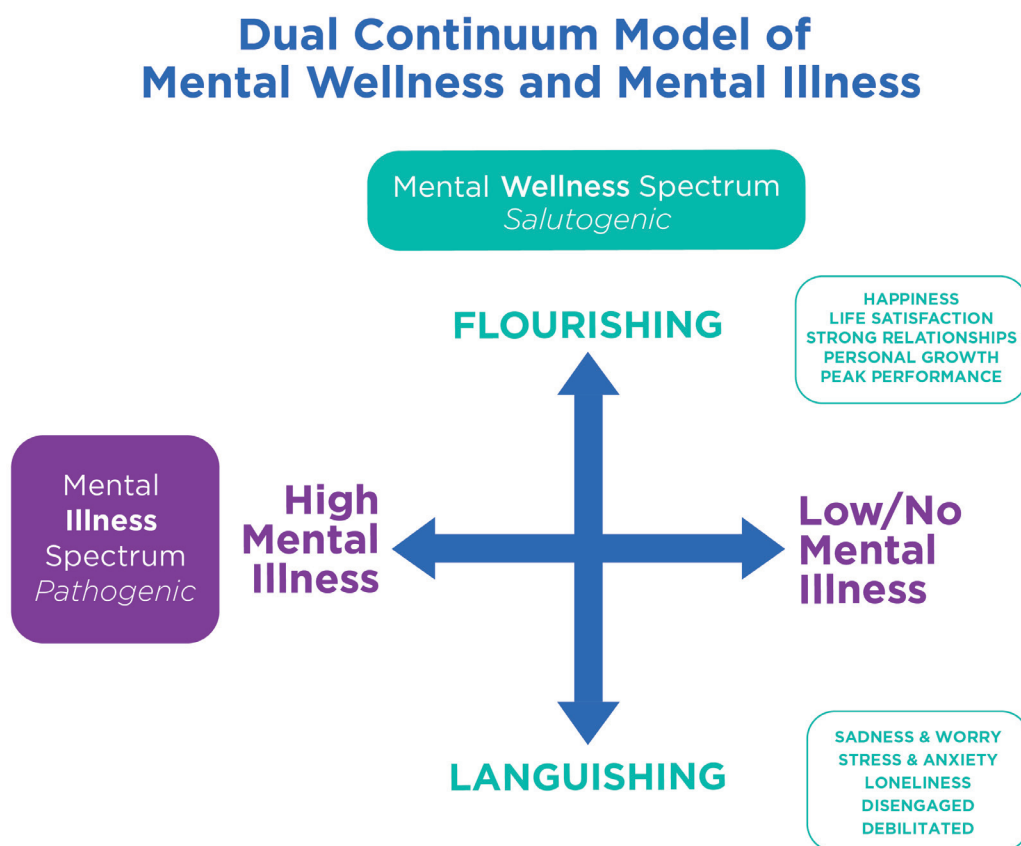
Source: Global Wellness Institute

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



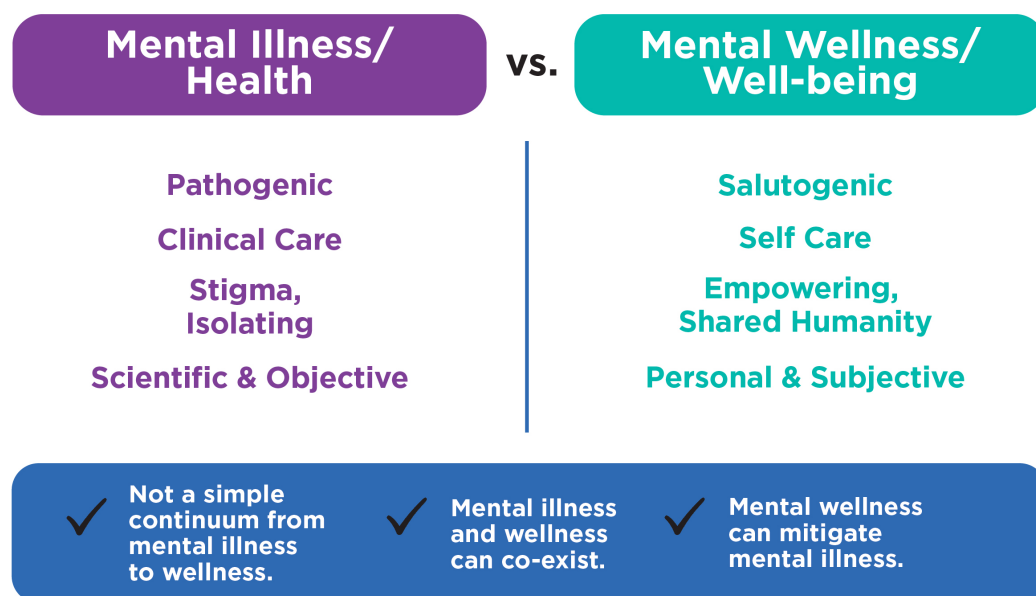
The dual continuum model was adapted
by GWI from concepts developed by Keith
Tudor (1996) and Corey L.M. Keyes (2002).
Source: Global Wellness Institute

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 2030¹⁰ – 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

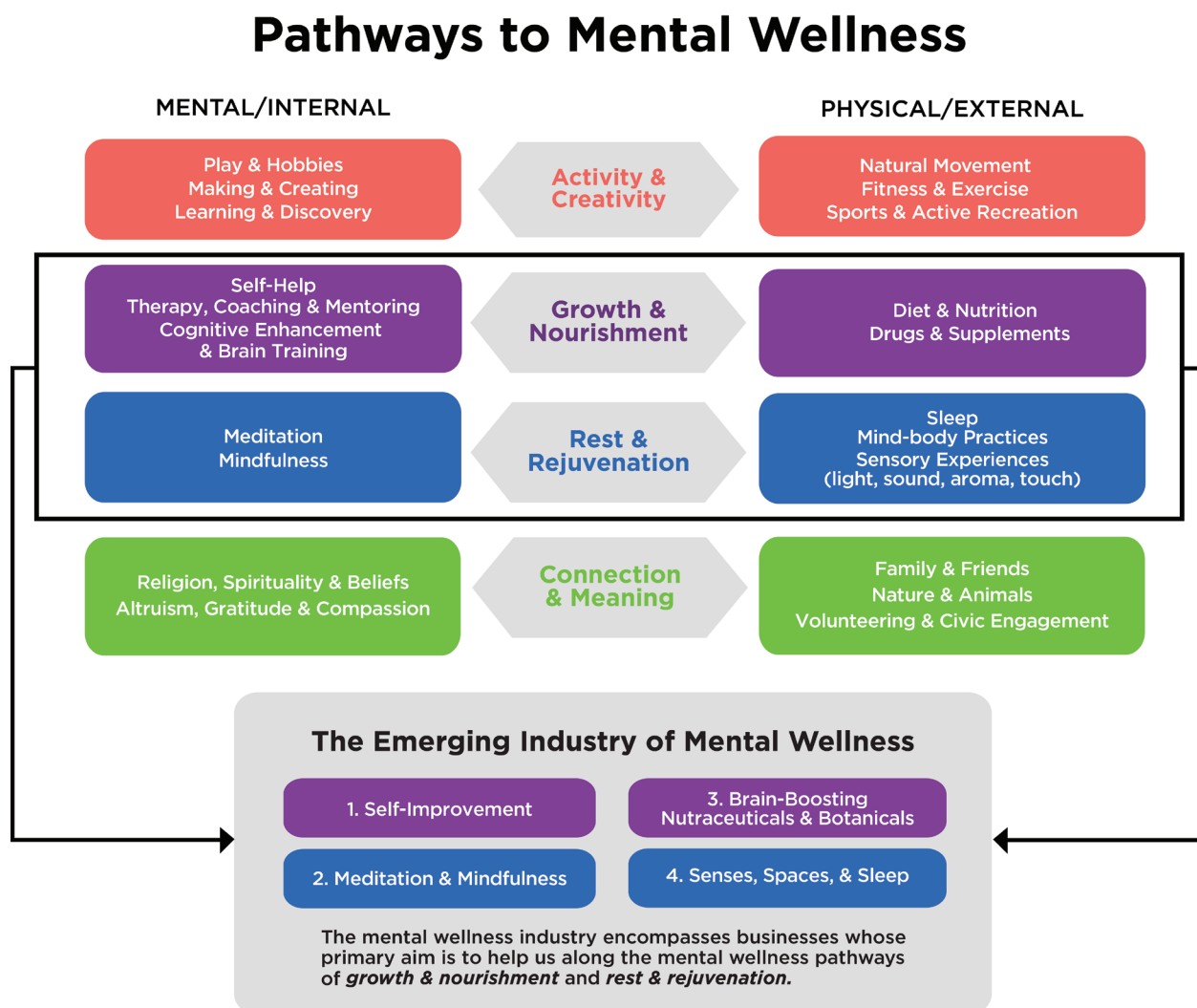
- Government policies (economic, healthcare, education, urban planning, parks and recreation, etc.) play a critical role in our mental wellness, because they shape our macro environments and our access to wellness-enhancing physical and built environments.
- Private businesses across many industries (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



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.)

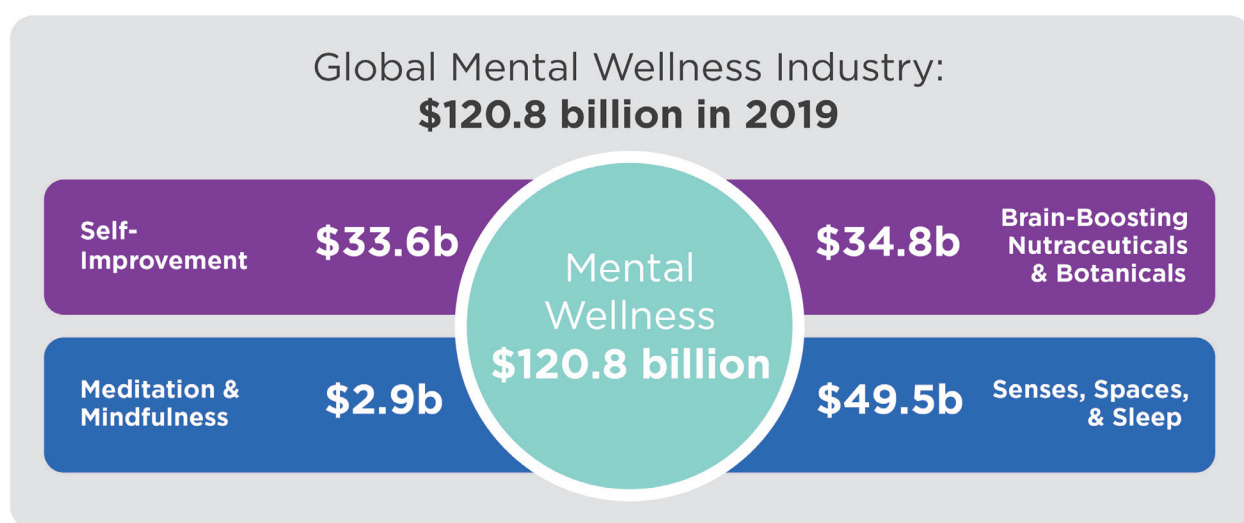
4. Senses, spaces, & sleep includes products, services, and design that target our senses and the mind-body connection, based upon the growing understanding that environmental stimuli have a major impact on our mood, stress levels, sleep, and mental health and well-being. This broad sector encompasses 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.

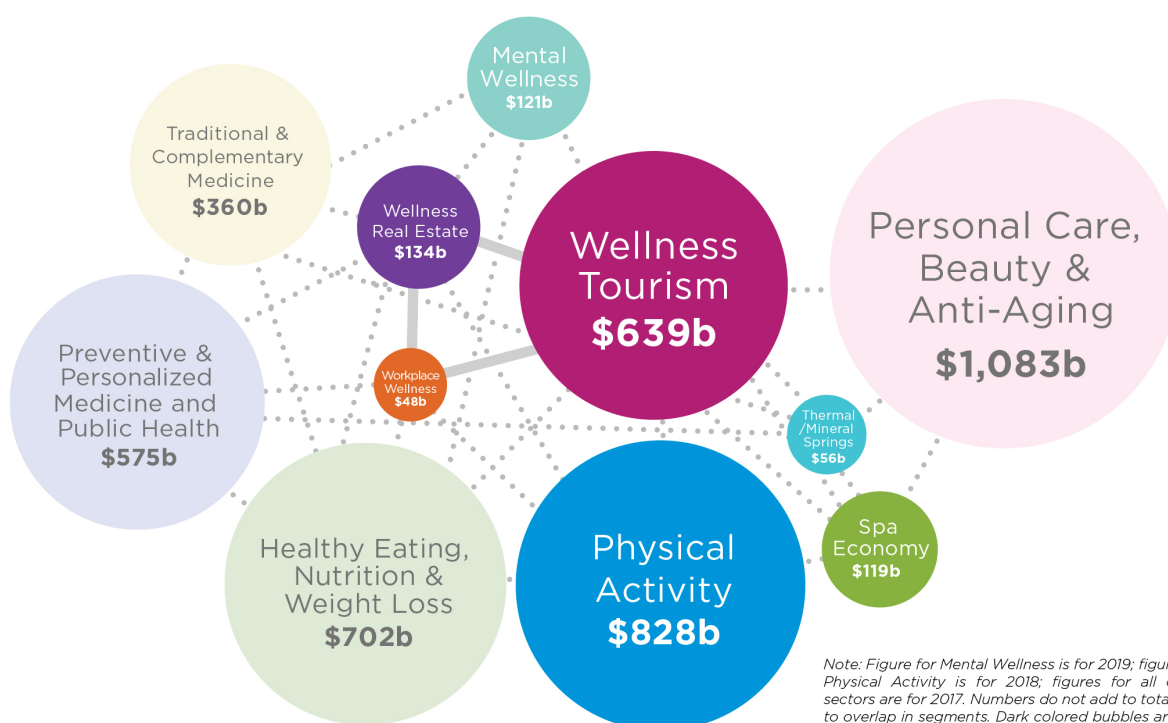
Technology is not a standalone segment within the mental wellness industry, but is pervasive across all subsectors (as described in detail in *Chapter V* of the full report). Mental health and mental wellness tech startups have become a major target for investors, receiving massive amounts of funding. 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

GLOBAL WELLNESS ECONOMY: \$4.5 Trillion Market



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.

² See: 1) Alzheimer's Disease International (2018). *World Alzheimer Report 2018*. <https://www.alz.co.uk/research/WorldAlzheimerReport2018.pdf>. 2) Helliwell, J.F., et al (2019). Changing World Happiness. In J.F. Helliwell, R. Layard, and J.D. Sachs (Eds.), *World Happiness Report 2019* (pp. 11-46). New York: Sustainable Development Solutions Network. https://s3.amazonaws.com/happiness-report/2019/WHR19_Ch2.pdf. 3) Gallup (2019). *Gallup Global Emotions 2019*. Washington, DC: Gallup. <https://www.gallup.com/analytics/248906/gallup-global-emotions-report-2019.aspx>. 4) DiJulio, B., Hamel, L., et al (2018, Aug. 30). *Loneliness and Social Isolation in the United States, the United Kingdom, and Japan: An International Survey*. <https://www.kff.org/other/report/loneliness-and-social-isolation-in-the-united-states-the-united-kingdom-and-japan-an-international-survey/>.

³ See: 1) World Health Organization (2020, May 14). *Substantial investment needed to avert mental health crisis*. <https://www.who.int/news-room/detail/14-05-2020-substantial-investment-needed-to-avert-mental-health-crisis>. 2) United Nations (2020, May 13). *Policy Brief: COVID-19 and the Need for Action on Mental Health*. <https://unsdg.un.org/sites/default/files/2020-05/UN-Policy-Brief-COVID-19-and-mental-health.pdf>. 3) World Health Organization (2020, Oct. 5). COVID-19 disrupting mental health services in most countries, WHO survey. *WHO News Release*. <https://www.who.int/news/item/05-10-2020-covid-19-disrupting-mental-health-services-in-most-countries-who-survey>.

⁴ The dual continuum model used in this report was adapted by the authors from work first developed by the Canadian Minister of Health and Welfare (1988), social worker/psychotherapist Keith Tudor (1996), and sociologist/psychologist Corey Keyes (2002). See: Keyes, C.L.M. (2002). The Mental Health Continuum: From Languishing to Flourishing in Life. *Journal of Health and Social Research*, 43, 207-222. <https://pubmed.ncbi.nlm.nih.gov/12096700/>.

⁵ See: 1) Keyes, C.L.M. (2005). Mental Illness and/or Mental Health? Investigating Axioms of the Complete State Model of Health. *Journal of Consulting and Clinical Psychology*, 73(3), 539-548. <https://doi.org/10.1037/0022-006X.73.3.539>. 2) Keyes, C.L.M. (2014). Mental Health as a Complete State: How the Salutogenic Perspective Completes the Pictures. In G.F. Bauer and O. Hämmig (Eds.), *Bridging Occupational, Organizational and Public Health: A Transdisciplinary Approach* (pp. 179-192). Dordrecht: Springer. https://doi.org/10.1007/978-94-007-5640-3_11.

⁶ See, for example: 1) Harrison, N. (2018). Enough talk: Fighting stigma in mental health. *The Lancet Psychiatry*, 5(6), E15. [https://doi.org/10.1016/S2215-0366\(18\)30194-9](https://doi.org/10.1016/S2215-0366(18)30194-9). 2) Wainberg, M.L., et al (2017). Challenges and Opportunities in Global Mental Health: A Research-to-Practice Perspective. *Current Psychiatry Reports*, 19(5), 28. <https://doi.org/10.1007/s11920-017-0780-z>. 3) Saxena, S., et al (2007). Resources for mental health: Scarcity, inequity, and inefficiency. *The Lancet*, 370, 878-889. [https://doi.org/10.1016/S0140-6736\(07\)61239-2](https://doi.org/10.1016/S0140-6736(07)61239-2). 4) Funk, M., et al (2010). *Mental health and development: Targeting people with mental health conditions as a vulnerable group*. Geneva: World Health Organization. <https://www.mhinnovation.net/sites/default/files/downloads/resource/Mental%20Health%20and%20Development.pdf>.

⁷ Keyes, C.L.M. (2014).

⁸ As noted by the World Health Organization, “Early in the 20th century the mental hygiene movement was successful in putting mental health promotion on the international agenda. During the 1920s and 30s there was substantial activity to stimulate ‘the integration of mental health principles into the practices of social work, nursing, public health administration, education, industry and government,’ views that are still very prevalent today. Despite the efforts of the pioneers, the movement initially failed to attract sufficient interest from these wider groups. It was not until the 1970s that the first studies into the value of integrating mental health principles into practice in other fields were initiated. During the past 30 years, however, some 2000 outcome studies have been published on promotion, prevention and related fields.” See: WHO, Department of Mental Health and Substance Abuse (2005). *Promoting Mental Health: Concepts, Emerging Evidence, Practice*. Geneva: WHO Press. https://www.who.int/mental_health/evidence/en/promoting_mhh.pdf.

⁹ See, for example: 1) Herron, R.E. (2018, Jan.-Feb.). The Transcendental Meditation Program’s Impact on the Symptoms of Post-traumatic Stress Disorder of Veterans: An Uncontrolled Pilot Study. *Military Medicine*, 183(1-2), e144-e150. <https://doi.org/10.1093/milmed/usx059>. 2) Azad Marzabadi, E., and Hashemi Zadeh, S.M. (2014, Oct). The Effectiveness of Mindfulness Training in Improving the Quality of Life of the War Victims with Post Traumatic Stress Disorder (PTSD). *Iranian Journal of Psychiatry*, 9(4), 228-236. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4361826/>. 3) Santa Maria, D., et al (2020, Jan.). Feasibility of a Mindfulness-Based Intervention with Sheltered Youth Experiencing Homelessness. *Journal of Child and Family Studies*, 29, 261-272. <https://doi.org/10.1007/s10826-019-01583-6>. 4) Maddock, A., et al (2017). Mindfulness Training as a Clinical Intervention with Homeless Adults: A Pilot Study. *International Journal of Mental Health and Addiction*, 15, 529-544. <https://doi.org/10.1007/s11469-016-9718-7>. 5) Muirhead, J., and Fortune, C.-A. (2016, May-June). Yoga in prisons: A review of the literature. *Aggression and Violent Behavior*, 28, 57-63. <https://doi.org/10.1016/j.avb.2016.03.013>. 6) Nauert, R. (2014, Feb. 11). Meditation Helps Refugees Recover from PTSD. *Psych Central*. <https://psychcentral.com/news/2014/02/11/meditation-helps-refugees-recover-from-ptsd/65732.html>.

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¹⁶ The mental wellness industry figures presented in this report are estimates made by the authors. We draw upon a wide variety of secondary data sources as a baseline, and we develop original estimates based upon our own economic models and our extensive knowledge of adjacent wellness sectors. Key sources consulted include: Euromonitor International, World Bank, United Nations, World Health Organization, U.S. National Center for Complementary and Integrative Health, International Coaching Federation, Statista, Frost & Sullivan, Arcview Group/BDS Analytics, Prohibition Partners, and a wide variety of industry-specific organizations, databases, publications, and media sources.

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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 globe⁹ 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 2030¹³ – 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 fulfillment 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



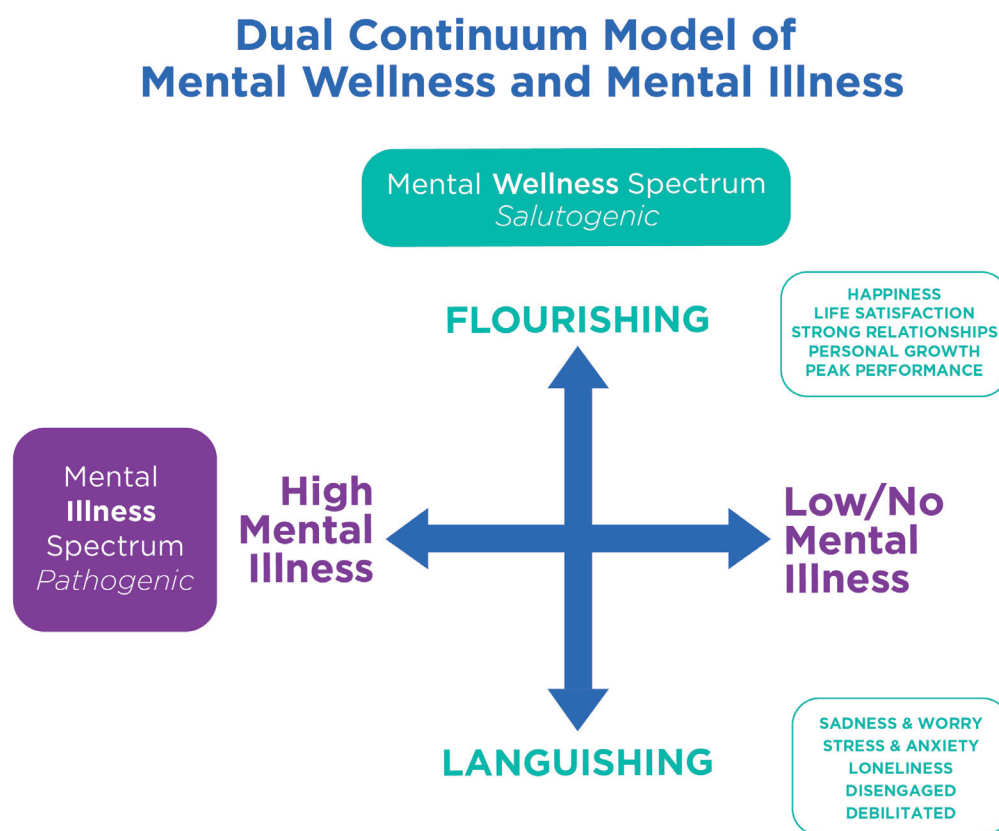
Source: Global Wellness Institute

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 (1988⁴), social worker/psychotherapist Keith Tudor (1996⁵), and sociologist/psychologist Corey Keyes (2002⁶). 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 fulfillment; 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.

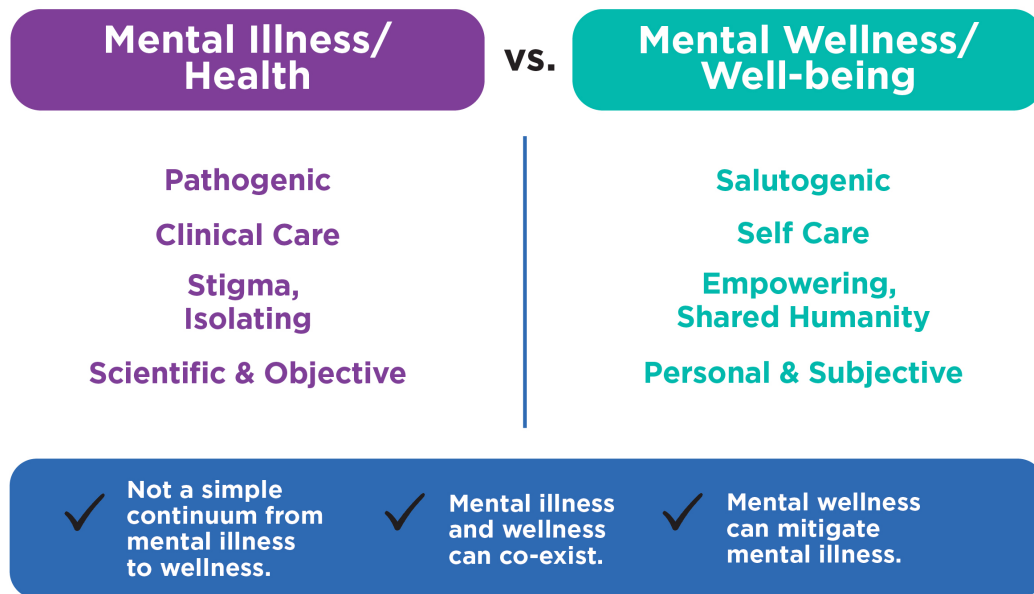
This approach does not ignore or refute the immense need for more resources and better methods to address and treat mental illness. Rather, it emphasizes that the promotion of mental wellness is an equally important (yet often overlooked) approach that can address a multitude of individual and societal 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 paper²⁵ 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

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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.).

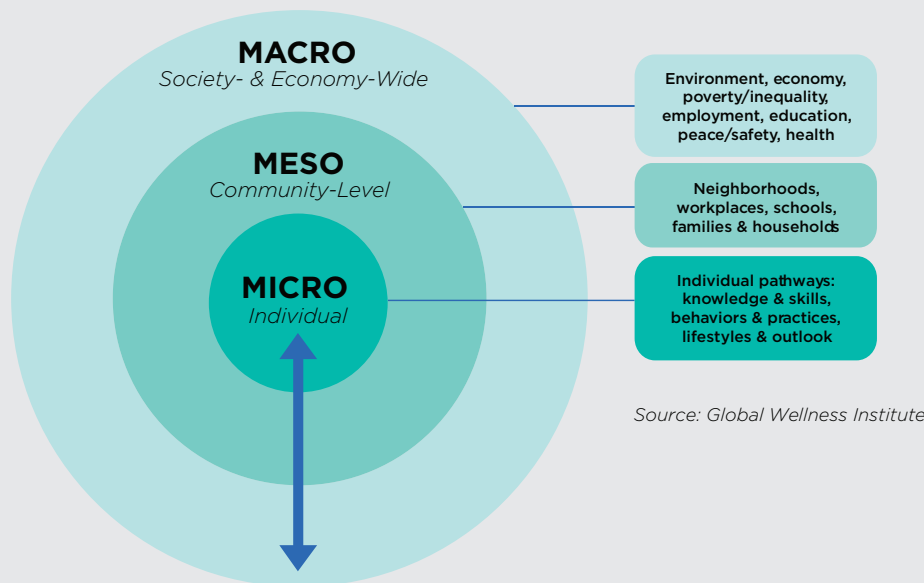
Governments play a major role in our access to mental wellness. At the highest level, external and macro-level circumstances (e.g., poverty, unemployment, war, hunger) are major impediments to mental wellness, and these are shaped by government policies both nationally and locally (see *Figure 5*). Governments 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



- **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 Wolfe²) 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.

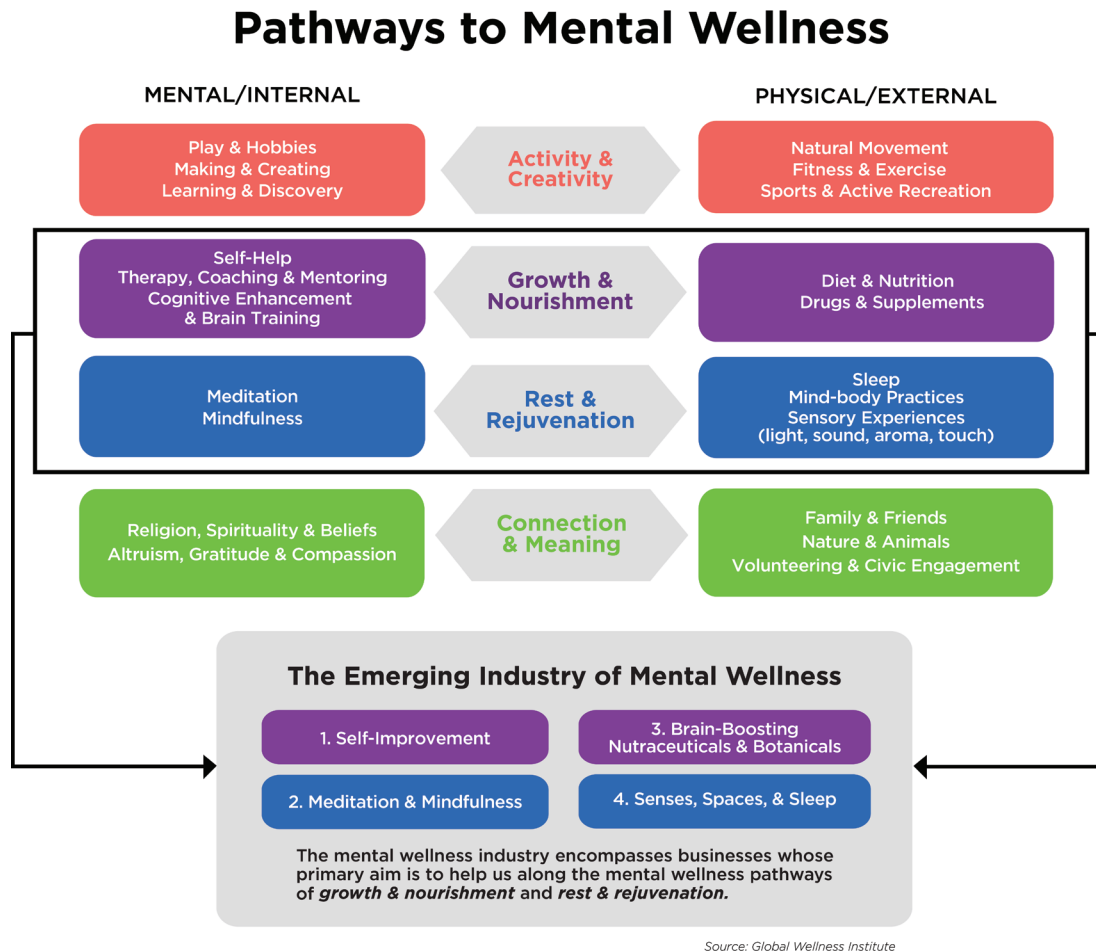
In this chapter, we narrow the focus from all of the beneficial mental wellness practices and pathways to the businesses that provide products, solutions, and experiences to consumers specifically for their mental wellness. We define the mental wellness industry as follows:

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



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 million⁷), 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.

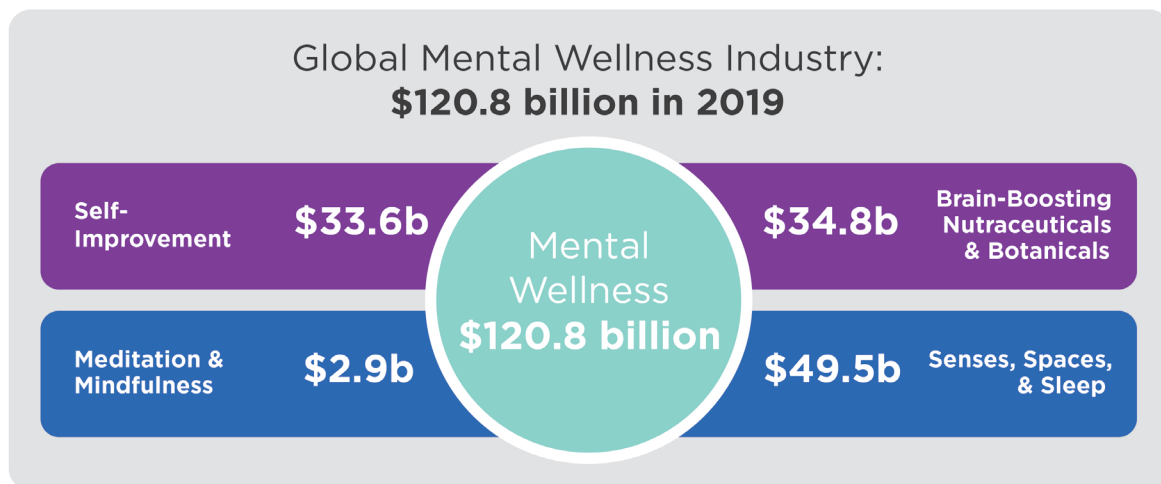
Finally, this mental wellness subsector includes **physical spaces**, because sensory, stress-reducing, and mental wellness-enhancing products and solutions are increasingly being incorporated into the design of our homes, workplaces, and travel destinations. These include sound-proofed windows and circadian 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).

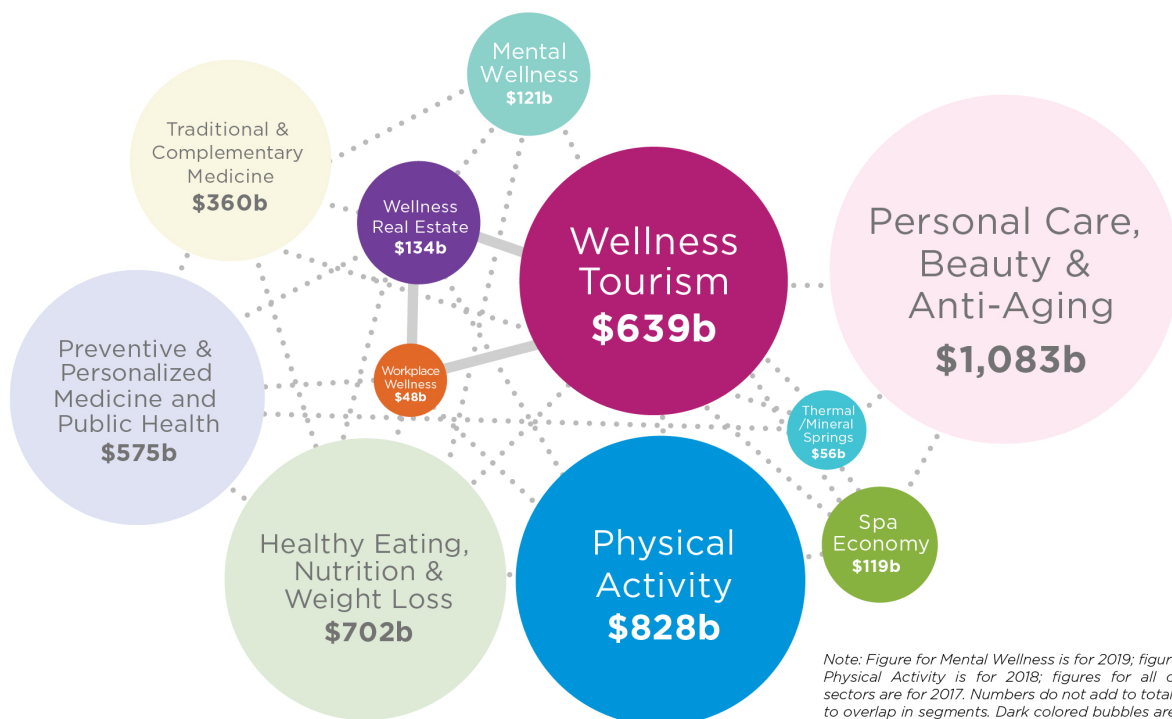
Mental wellness is a new “industry bubble” within the Global Wellness Economy framework.

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

GLOBAL WELLNESS ECONOMY: \$4.5 Trillion Market



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.

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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
- Rendeever
- 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 year⁵). 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, LGBTQ+, 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, Rendeever). 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 as 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, Breethr, 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 heart rate.
- 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 as 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 “krystallos,” 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 disorder⁶¹; 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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⁸ See, for example: Whitbourne, S.K. (2014, May 3). How Should Psychology Define Happiness? *Psychology Today*. <https://www.psychologytoday.com/us/blog/fulfillment-any-age/201405/how-should-psychology-define-happiness>.

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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 | | |
|--|--|--|
| <i>Hedonic</i> | <i>Eudaimonic</i> | |
| Emotional/subjective well-being | Psychological well-being | Social well-being |
| <ul style="list-style-type: none"> • Positive affect • Avowed quality of life (life satisfaction/evaluation) | <ul style="list-style-type: none"> • Self-acceptance • Personal growth • Purpose in life • Environmental mastery • Autonomy • Positive relations with others | <ul style="list-style-type: none"> • Social acceptance • Social actualization • Social contribution • Social coherence • Social integration |

Endnotes

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² Diener, E. (1984). Subjective well-being. *Psychological Bulletin*, 95(3), 542-575. <https://doi.org/10.1037/0033-2909.95.3.542>.

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⁴ See: <https://worldhappiness.report/>.

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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 "krystallos," 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 (1368-1644 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 community⁹). 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 18th-19th 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 19th 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-20th 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.

Endnotes

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Appendix D: Selected Bibliography

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Appendix E: Acknowledgements

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