

**Global Wellness  
Tourism Economy:**

# **Asia-Pacific**

**NOVEMBER 2018**



**GLOBAL WELLNESS  
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# Global Wellness Tourism Economy: Asia-Pacific

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# ABOUT THE AUTHORS

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## ABOUT THE GLOBAL WELLNESS INSTITUTE

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

[www.globalwellnessinstitute.org](http://www.globalwellnessinstitute.org)

## ABOUT THE AUTHORS

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

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# EXECUTIVE SUMMARY

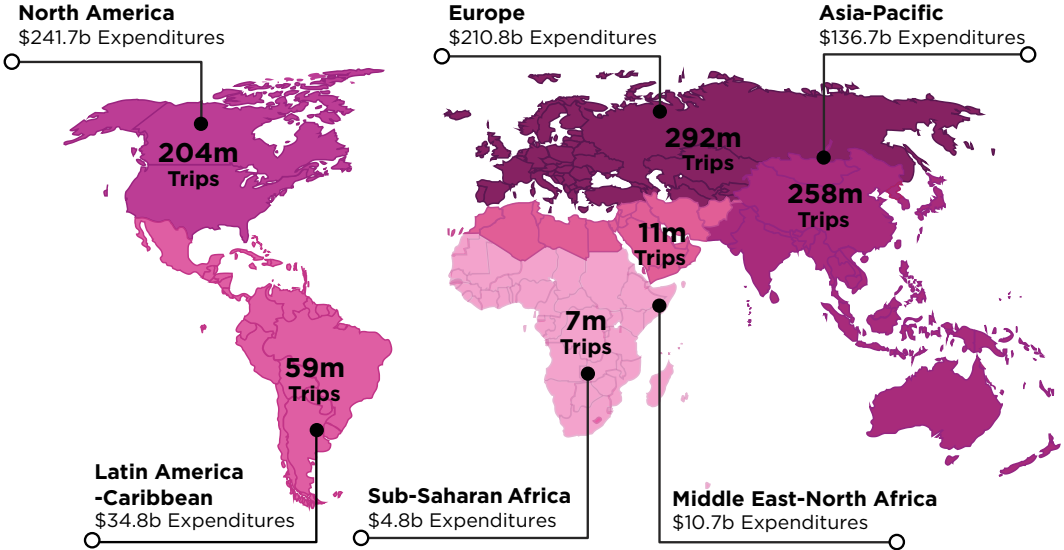
Wellness tourism is travel associated with the pursuit of maintaining or enhancing one’s personal wellbeing. GWI estimates wellness tourism is a \$639 billion global market in 2017, growing more than twice as fast as general tourism.

In 2013, the Global Wellness Institute (GWI) unveiled the inaugural edition of the Global Wellness Tourism Economy report — a landmark study that defined the parameters and characteristics of the emerging wellness tourism sector, estimated its global size, and highlighted its far reaching economic impacts. Since then, this tourism segment has accelerated around the world. This updated Global Wellness Tourism Economy report revisits the framework and definition presented in the inaugural report and provides new data and insights on global, regional, and country-level developments.

Estimated at \$639.4 billion in 2017, wellness tourism is a fast-growing tourism segment that has been growing by 6.5% annually from 2015-2017 (more than twice the growth rate for general tourism). Travelers made 830 million wellness trips in 2017, which is 139 million more than in 2015. Growth has been driven by an expanding global middle class, growing consumer desire to adopt a wellness lifestyle, rising interest in experiential travel, and increasing affordability of flights and travel options. Across regions, Europe remains the destination for the largest number of wellness trips, while North America leads in wellness tourism expenditures. Asia has made the most gains in the number of wellness trips and wellness tourism expenditures, with demand stimulated by strong economies and an expanding middle class.

## Wellness Tourism by Region, 2017

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



Source: Global Wellness Institute

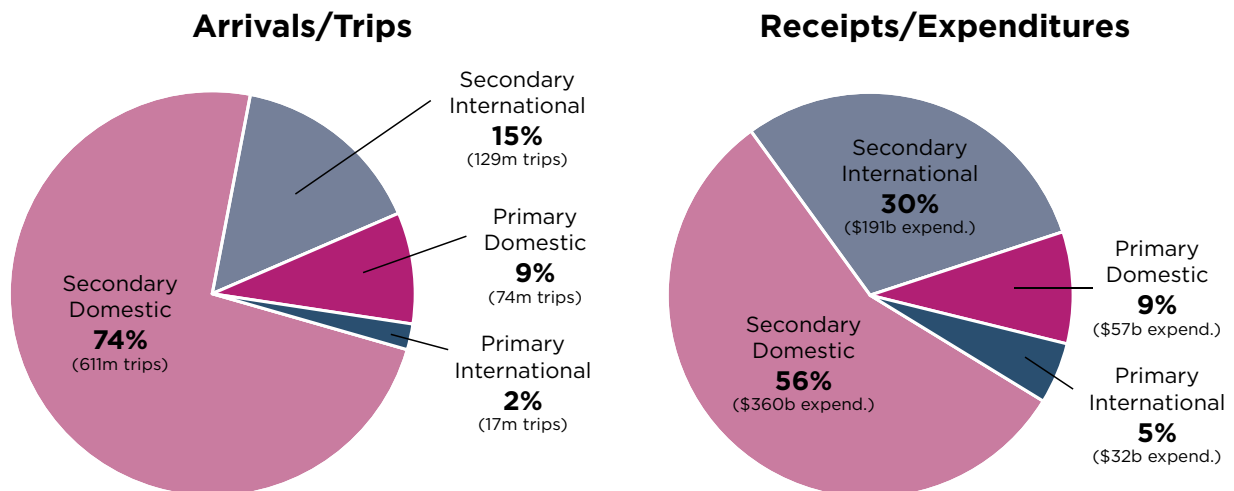
## Secondary wellness travelers account for the bulk of wellness tourism trips and growth: 89% of trips and 86% of expenditures.

The wellness tourism market includes two types of travelers: **primary wellness travelers**, who are motivated by wellness to take a trip or choose their destination based on its wellness offerings (e.g., someone visiting a wellness resort or participating in a yoga retreat); and **secondary wellness travelers**, who seek to maintain wellness or engage in wellness activities during any kind of travel (e.g., someone who visits a gym, gets a massage, or prioritizes healthy food when they take a trip). The bulk of wellness tourism is done by secondary wellness travelers, who account for 89% of wellness tourism trips and 86% of expenditures in 2017. Secondary wellness tourism also continues to grow at a faster rate than primary wellness tourism, at 10% compared to 8% annually, from 2015-2017.

## Domestic wellness travel dwarfs international wellness travel, but international wellness trips have been growing faster.

Globally, domestic travel accounts for 82% of total wellness tourism trips and 65% of expenditures. International wellness trips represent a proportionally larger share of expenditures because the average level of spending for an international trip is much higher. International wellness tourism trips have also been growing at a faster pace (12% annually) than domestic wellness tourism trips (9% annually) from 2015-2017.

### Secondary and Domestic Wellness Travel Lead In Trips and Expenditures

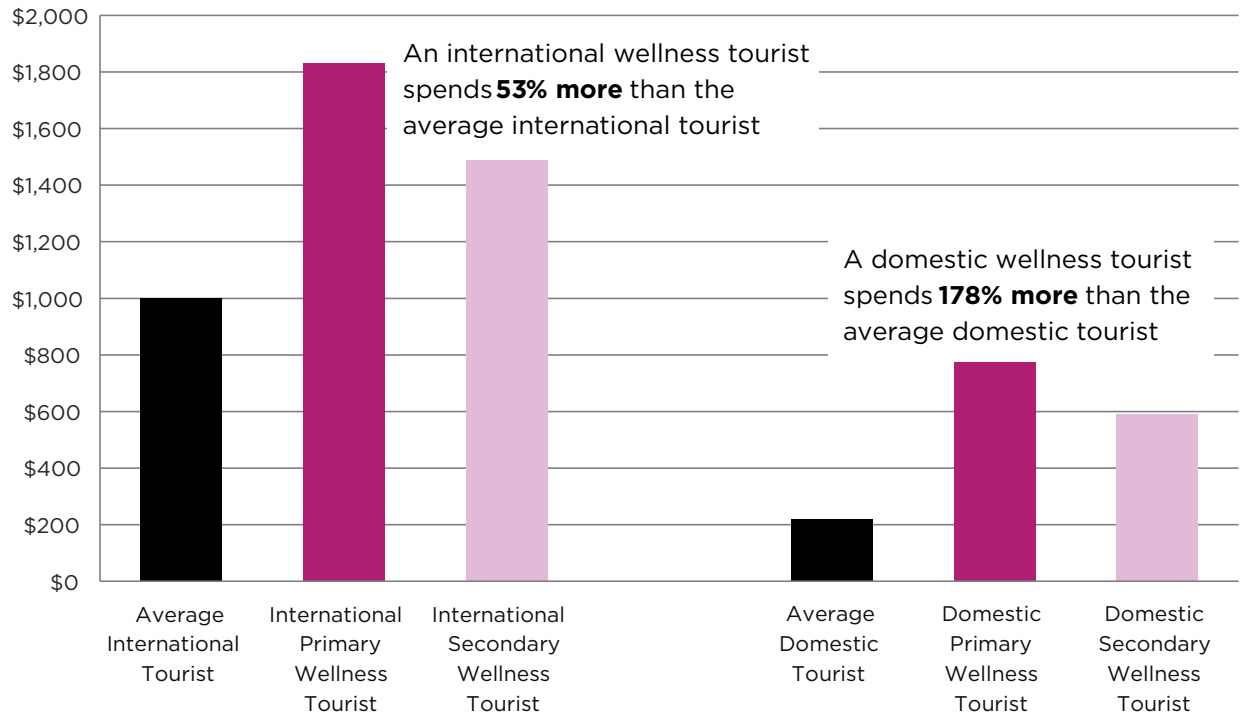


*Note: Figures may not sum to total due to rounding.  
Source: Global Wellness Institute*

## Wellness tourism is high-yield tourism.

Wellness travelers spend more per trip than the average tourist, and this holds true for both domestic and international travelers. In 2017, international wellness tourists on average spent \$1,528 per trip, 53% more than the typical international tourist. The premium for domestic wellness tourists is even higher. At \$609 per trip, they spend 178% more than the typical domestic tourist.

### Wellness Tourism Spending Premiums, 2017



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

## Wellness tourism creates opportunities for wellness and all tourism and hospitality-related businesses.

The \$639.4 billion spent globally by wellness travelers is distributed among many segments of the tourism industry, from food and lodging, to activities, excursions, shopping, and other services. Within each segment, some expenditures may include wellness-focused activities (such as visiting a hot spring, getting a massage, or taking a meditation or fitness class), while other expenditures may be “generic” (such as transportation, general food and lodging, or buying souvenirs). As more consumers incorporate wellness into their lifestyles, there are many opportunities for all businesses to infuse wellness into their offerings and capture spending by wellness travelers.

### Wellness Tourism Industry in 2017



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

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



## Wellness tourism will continue its growth momentum as more consumers adopt wellness as a key decision driver.

GWI projects that wellness tourism will grow at an average annual rate of 7.5% through 2022, considerably faster than the 6.4% annual growth forecasted for overall global tourism. We expect that global wellness tourism expenditures will reach over \$919 billion in 2022, representing 18% of the global tourism market. Correspondingly, we project wellness tourism trips to grow by 8.1% annually to 1.2 billion trips in 2022. This growth forecast is well-aligned with the expected growth across many sectors that focus on wellness and holistic health (e.g., fitness/mind-body, healthy eating, organic food, etc.), as more consumers adopt wellness as a dominant lifestyle value and decision driver.

Over half of the projected growth in wellness tourism expenditures (and three-quarters of the growth in wellness trips) through 2022 will take place in Asia-Pacific, Latin America-Caribbean, Middle East-North Africa, and Sub-Saharan Africa, driven by a dramatic increase in both domestic tourism and intra-regional wellness tourism in these markets.

### Wellness Tourism Growth Projections, 2017-2022

|  | Projected Expenditures<br>(US\$ billions) |                | Projected Average Annual<br>Growth Rate |
|--|---|----------------|---|
|  | 2017                                      | 2022           | 2017-2022                               |
| North America                          | \$241.7                                   | \$311.3        | 5.2%                                    |
| Europe                                 | \$210.8                                   | \$275.0        | 5.5%                                    |
| Asia-Pacific                           | \$136.7                                   | \$251.6        | 13.0%                                   |
| Latin America-Caribbean                | \$34.8                                    | \$54.7         | 9.5%                                    |
| Middle East-North Africa               | \$10.7                                    | \$18.7         | 11.8%                                   |
| Africa                                 | \$4.8                                     | \$8.1          | 11.1%                                   |
| <b>Total Wellness Tourism Industry</b> | <b>\$639.4</b>                            | <b>\$919.4</b> | <b>7.5%</b>                             |

*Source: Global Wellness Institute estimates, based upon tourism industry data from Euromonitor International, economic data from the IMF, and GWI's data and projection model*

## Wellness, hospitality, and travel businesses are converging.

Since wellness tourism burst into mainstream consumer consciousness a few years ago, the industry has evolved rapidly. Businesses and governments are investing in developing new strategies, products, experiences, and destinations. Wellness, hospitality, and travel are converging in diverse and unprecedented ways, as businesses experiment with new partnerships and business models to help travelers incorporate wellness into every aspect of their trips.

**Fly healthy and fly well.** Recognizing that air travel can be unhealthy and stressful, airports and airlines are promoting health and wellness programs for their customers. Collaborations among airports, airlines, and wellness businesses are taking many forms: high-end spas, fitness centers, and wellness classes in terminals and airline lounges; in-flight meditation, wellness programming, and sleep aides; healthier food options; and even healthier/biophilic airport design.

**Healthy hotels go mainstream.** As wellness travel becomes more mainstream, many hotels are incorporating wellness into their design, amenities, services, and programming. Wellness features may include bedding and lighting that promote better sleep, windows and shades that block out light and noise, in-room fitness equipment and videos, healthy snacks and menus at restaurants, or on-site spas and gyms. Acquisitions, partnerships, and collaborations between hospitality companies and fitness, spa, and other wellness brands are increasingly common. An emerging trend is the adoption of wellness architecture, biophilic design, and sustainability elements into the entire design of the property.

**Engineering wellness travel experiences.** Consumers increasingly view vacations as an opportunity to experience wellness in new ways, and businesses from cruise lines to tour operators and event organizers are engineering diverse new wellness travel experiences. A number of cruise lines are partnering with wellness industry experts and service providers to raise the quality and sophistication of their wellness offerings or to create wellness-themed voyages.

**Wellness products and brands travel with their customers.** As wellness routines become a daily lifestyle for many consumers, products and brands are following their customers on their travels to help them continue these routines wherever they go (e.g., Westin partnering with Peloton). Some retail and product companies like Lululemon and Free People are extending their wellness-minded brands into experiences, such as offering wellness retreats for their customers.

**A new nexus of travel, work, and wellness.** For those who want to experience a country for a longer duration than the standard vacation, companies such as Roam, Outside, The Remote Experience, and others are offering a combination of coworking, coliving, and travel, enabling people to experience other countries and cultures while working and living with like-minded individuals for a week, a month, or longer. Many provide on-site wellness/fitness amenities, yoga classes, meditation, and other community events.

Clearly, the rise of wellness tourism is enticing new entrants into the market, as well as new forms of competition and partnerships. The integration of business areas along a continuum from hospitality to wellness and healthy lifestyles will continue to gather momentum. We expect more experimentation in different types of integration within this continuum in the future, as different players in the travel, hospitality, spa, fitness, and retail worlds identify what drives their core customers and seek out new ways to distinguish themselves from competitors in this evolving landscape.

## Destination marketing becomes more authentic and place-based.

Since GWI began studying wellness tourism, the number of countries that actively market some form of wellness tourism at the national level has grown from 65 in 2013 to more than 100 in 2018. Importantly, the nature and focus of wellness tourism marketing and development has become more targeted and authentic. Thermal/mineral springs have seen the biggest growth in marketing and development focus, both in countries with longstanding hot spring bathing traditions (across Europe, Latin America, and Asia), as well as in countries with undeveloped geothermal assets (e.g., Kenya, Rwanda, Ethiopia, Saudi Arabia, Cambodia, India).

A small but growing number of destinations are developing a truly authentic and place-based wellness tourism product and brand — from the state of Kerala, India, which branded itself as the “Land of Ayurveda” over two decades ago, to neighboring countries such as Sri Lanka, Nepal, and Bhutan, each promoting wellness tourism experiences that link wellness with yoga, Ayurveda, meditation, spirituality, pilgrimage, indigenous medicine, faith healing, and happiness. Other examples include Costa Rica’s new “Wellness Pura Vida” tourism campaign, and Beverly Hills’ (U.S.) “City of Wellth” tourism campaign to redefine luxury as less about materialism and more about health, purpose, and happiness.

## Wellness tourism brings wide-ranging impacts to destinations and their people.

As wellness tourism evolves, it is becoming recognized as an opportunity to bring wide-ranging benefits to local economies and populations. As such, wellness tourism development is increasingly integrated with regional economic planning and community development. Austria’s Tirol region has leveraged wellness tourism to develop a broader “Cluster Wellness Tirol” network, which now includes more than 100 businesses in telemedicine, food, nutrition, spa equipment and technology, workplace wellness, and other wellness-related fields. Costa Rica’s “Wellness Pura Vida” strategy (currently under development) aims to engage local communities in the planning process and to use wellness tourism development as a catalyst for social and economic growth in seven regions across the country. Rochester, Minnesota’s 20-year, \$5.6 billion Destination Medical Center initiative builds on the world-class reputation of the Mayo Clinic and its massive medical tourism industry (3 million+ visitors per year). Plans include a “heart of the city” urban district where hospitality intersects with healthcare, with healthy design and extensive wellness lifestyle and leisure amenities that will benefit thousands of Mayo Clinic employees/residents alongside the visitors to the clinic and their families.

## In the future, the wellness of travel will increasingly link to the wellness of the place and how we contribute to it.

As more consumers adopt wellness as part of their value system, they will increasingly filter their travel experiences through a holistic wellness lens, and they will increasingly become interested in the wellbeing of the people in the places that they visit. That is one reason why a high-end resort hotel such as The Breakers Palm Beach (U.S.) puts their employee wellness at the center of their brand and their guest experience, or why Westin Hotels & Resorts is expanding its wellness offerings to organize activities that allow guests to give back to the places they are visiting. Recognizing that the wellness of a place is the DNA of its authentic wellness offering, more destinations, regions (such as Wellness Valley in Romagna, Italy and the state of Colorado in the United States), and countries (such as Costa Rica and Bhutan) are prioritizing the wellbeing of their residents and their environment to create their own unique wellness value proposition and brand.

In a holistic wellness framework, being well and doing good are closely connected; we cannot be truly well if our communities and the environment around us are not well. Research from the rapidly expanding fields of happiness, compassion, and altruism suggests that we are more likely to attain a deeper and lasting sense of peace and wellbeing by focusing on others, through helping, giving, and forming deeper connections. In recent years, wellness travel has also been evolving from a focus on being experiential to being transformative. We predict that future wellness travelers will increasingly link personal transformation with the connections they make during travel and their impacts on the people and the places that they touch. Wellness travel will become a more meaningful two-way exchange between the travelers and the destination, instead of a one-sided consumptive and commercial transaction. This consumer evolution, along with the development of wellness tourism, can play an important role in mitigating the negative impacts of over-tourism in some popular destinations and regions.

## Asia-Pacific Wellness Tourism Highlights (2017)



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

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

**Projected Wellness Tourism Expenditures CAGR (2017-2022):** 13.0%

**Average Expenditure per Trip:**

\$1,741 for intl./inbound (33% premium); \$268 for domestic (120% premium)

**Direct Jobs:** 10.1 million

### Top Ten Wellness Tourism Markets in Asia-Pacific, 2017

|             | Number of Arrivals/Trips<br>(thousands) |          |                 | Receipts/Expenditures<br>(US\$ millions) |
|-------------|---|----------|-----------------|--|
|             | Inbound/Intl.                           | Domestic | Total           |  |
| China       | 7,724.3                                 | 62,442.2 | <b>70,166.5</b> | <b>\$31,705.9</b>                        |
| Japan       | 1,585.5                                 | 38,900.0 | <b>40,485.5</b> | <b>\$22,466.1</b>                        |
| India       | 4,542.4                                 | 51,426.3 | <b>55,968.6</b> | <b>\$16,299.7</b>                        |
| Thailand    | 5,691.9                                 | 6,764.1  | <b>12,456.0</b> | <b>\$12,018.4</b>                        |
| Australia   | 876.2                                   | 9,122.1  | <b>9,998.3</b>  | <b>\$10,520.9</b>                        |
| South Korea | 1,709.8                                 | 17,908.6 | <b>19,618.3</b> | <b>\$7,186.6</b>                         |
| Indonesia   | 5,183.5                                 | 3,151.7  | <b>8,335.2</b>  | <b>\$6,928.5</b>                         |
| Malaysia    | 3,331.7                                 | 4,956.1  | <b>8,287.8</b>  | <b>\$5,019.2</b>                         |
| Vietnam     | 3,149.5                                 | 6,465.8  | <b>9,615.3</b>  | <b>\$4,001.1</b>                         |
| New Zealand | 341.0                                   | 2,736.5  | <b>3,077.5</b>  | <b>\$3,036.0</b>                         |

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

### Wellness Tourism Spending Premiums in the Top Ten Markets, 2017

|             | Average Spending per<br>INBOUND/INTERNATIONAL Trip |              | Average Spending per<br>DOMESTIC Trip |              |
|-------------|--|--------------|---------------------------------------|--------------|
|             | Wellness Trip                                      | Average Trip | Wellness Trip                         | Average Trip |
| China       | <b>\$2,226</b>                                     | \$1,417      | <b>\$232</b>                          | \$146        |
| Japan       | <b>\$2,192</b>                                     | \$1,436      | <b>\$488</b>                          | \$307        |
| India       | <b>\$2,937</b>                                     | \$1,941      | <b>\$58</b>                           | \$36         |
| Thailand    | <b>\$1,885</b>                                     | \$1,206      | <b>\$191</b>                          | \$120        |
| Australia   | <b>\$2,992</b>                                     | \$2,490      | <b>\$866</b>                          | \$487        |
| South Korea | <b>\$2,054</b>                                     | \$1,307      | <b>\$205</b>                          | \$126        |
| Indonesia   | <b>\$1,184</b>                                     | \$793        | <b>\$251</b>                          | \$115        |
| Malaysia    | <b>\$1,109</b>                                     | \$717        | <b>\$267</b>                          | \$102        |
| Vietnam     | <b>\$959</b>                                       | \$634        | <b>\$152</b>                          | \$97         |
| New Zealand | <b>\$2,758</b>                                     | \$2,115      | <b>\$766</b>                          | \$478        |

*Note: These figures include both primary and secondary wellness trips. Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International*

## Asia-Pacific Wellness Tourism Developments

- Wellness tourism continues its rapid growth trajectory in the Asia-Pacific region, as more stressed-out people look to travel for respite and rejuvenation. To meet the growing wellness sophistication of Asian travelers, wellness travel offerings have expanded tremendously in breadth and depth, moving far beyond typical offerings such as detox, weight loss, spa treatments in a gazebo, and yoga on the beach. Across Asian destinations, there is tremendous increase in demand for all types of wellness modalities and experiences — from sound therapy to tai chi, and from meditation to spiritual guidance. Many travelers are interested in what a specific place has to offer, creating opportunities for destinations to dig into their own traditions, healing modalities, natural settings, and local ingredients to create a differentiated experience. With the alarming rise of air pollution across major metropolitan cities in China, India, and other Asian countries, some travelers are even traveling in search of healthier air, planning “lung-cleansing” and “smog-escape” wellness trips.
- Although less than half of the nations in the Asia-Pacific region promote wellness on their national tourism websites, this number has grown by more than 60% over the last five years (from 13 to 21 countries). Many of the countries that do market wellness tourism are also actively engaged in supporting the development of their nation’s wellness offerings, often centered around thermal tourism sites. Some countries are promoting other aspects of their wellness sectors, such as beauty and traditional bathhouses in South Korea; healthy eating in Vietnam; meditation, Ayurveda, and yoga in Sri Lanka and India; and spirituality, meditation, and healing in Nepal and Bhutan. Several countries, including Sri Lanka, Bhutan, Malaysia, China, the Philippines and India, provide economic incentives to companies investing in wellness-related developments. For example, India, through its Market Development Assistance Scheme, supports new and redevelopment projects in the wellness tourism sector.
- India and other destinations in South Asia and the Himalayan region are capitalizing on the rising global interest in yoga, meditation, and Ayurvedic health to promote wellness tourism. In 2016, India set up a National Medical & Wellness Tourism Promotion board to provide policy advice on these sectors. Measures to support wellness tourism include guidelines for quality and training, financial assistance, and investment promotion for wellness centers catering to tourists. Sri Lanka aggressively promotes wellness tourism with an Ayurvedic flavor, in conjunction with its wildlife, history, nature, and cultural offerings, and the country has seen a tremendous rise in investment and arrivals. Bhutan’s distinct focus on low-volume, high-spend tourism (requirement of \$200-250 spending per day) aligns well with its growing wellness tourism industry, which has received massive investment that turns its various assets — nature, hot springs, antiquity, culture, spiritual heritage, and happiness — into specially curated healing journeys for guests.
- The Chinese wellness tourism sector, while enormous, mostly caters to its domestic travelers. The interest and appetite for wellness travel continue to rise among Chinese consumers, many of whom are rediscovering their wellness heritage and healing systems — from Traditional Chinese Medicine (TCM) and herbal medicine, to qigong, meditation, and martial arts. In recent years China has placed increased attention on developing its health and wellness industry, marketing to both domestic and international tourists the variety of health and wellness services offered across the country, especially those derived from TCM. Since the first Chinese Wellness Tourism Conference was held in 2016, a number of health and wellness conferences

have emerged, including the Wellness China Expo, to promote wellness tourism products, investment, and financing.

- Some countries are leveraging their advanced medical industries and wellness sectors to cross-promote wellness and medical tourism, such as Malaysia, Singapore, South Korea, Thailand, and Philippines. Their strengths in both segments allow them to tap into overlapping opportunities, such as: stressed out executives who want a medical checkup, detox, meditation, and life coaching while on vacation; patients recovering from minor procedures (and their families) looking for a healing setting; as well as travelers seeking TCM, Ayurveda, Tibetan, and other integrative medicine and related wellness modalities to address chronic health or mental wellness issues.
- Australia is both a major source and destination for wellness travelers. Australians are enthusiastic and sophisticated wellness consumers, and the diversity, vast size, and resources of the country create many opportunities to combine wellness with outdoor, nature, adventure, cultural, culinary, and other travel interests. Already home to a number of well-known wellness resorts and hot springs, Australia now also hosts a growing number of festivals and events that focus on wellness. The potential for wellness tourism has caught the government's attention. Tourism Australia has named wellness as one of five key niches for regional tourism development and is now actively promoting private investment in this sector.
- A relatively recent development in Asia-Pacific is the integration of wellness and wellness tourism into large-scale urban planning and economic development projects. For example, Malaysia's large-scale Medini Iskander development combines wellness-driven urban living and tourism facilities with advanced health services, medical tourism, and smart-city infrastructure and design. South Korea's Jeju Island project is expanding from its traditional medical tourism focus to add holistic and wellness amenities and services for tourists, as well as resort-style residential living with wellness-inspired design and amenities that capitalize on the island's natural beauty and environment.

## Spas

- Asia-Pacific remains the region with the highest number of spas and the fastest growth, with the hotel/resort spa category leading in new investments and openings. Much of the growth is driven by demand from enthusiastic wellness travelers. Whether primary or secondary, wellness travelers seek a wide range of wellness experiences and options at their destination, while also expecting more personalization. Luxury urban hotels and resort hotels have been best able to adapt their facilities and offerings to meet these demands, and numerous luxury hotels have opened with sumptuous spas in diverse markets stretching from China to Vietnam to the Maldives.
- There is a marked increase among Asian hotels and resorts advertising their spas and wellness packages, and also developing offerings to meet the fast-growing demand for retreats along a full range of wellness themes/interests — yoga, meditation, detox, fitness/boot camp, personal transformation, surfing, etc. More spas are promoting traditional Asian wellness modalities and programming, from Ayurvedic treatments to TCM, from chi gong to yoga and meditation, and from Tibetan medicine to Balinese healing. In countries such as Sri Lanka and India, a growing number of hotel/resort spas and traditional Ayurvedic resorts are transforming themselves into

destination spas and wellness retreats that provide a holistic package of services, experiences, or journeys. The Carnoustie Group, known for its Ayurveda and wellness resorts in India, has announced plans to develop luxury wellness centers throughout China.

- The underlying demand for the Asian spa industry is driven by growing consumer interest in living healthier and more fulfilled lives, against the rise of chronic disease, stress levels, mental imbalance, and unhappiness. It is increasingly common for consumers to turn to body work to relieve stress and chronic pain, and to seek treatments that help maintain vitality and good health. Interest in yoga, meditation, and mind-body practices is on the rise across the region. In many Asian metropolises, spas have turned into urban sanctuaries where guests seek much more than just a facial or massage, but a full range of holistic wellness experiences. The need to inject wellness into ever busier lives has given rise to half-day and one-day urban retreat programs that combine a range of modalities (meditation, yoga, coaching/spiritual guidance, body work, hydrotherapy, sound healing, energy treatments, etc.). The Four Seasons in Hong Kong, for example, has created a “Masters of Wellness” program that allows guests to learn from top-notch visiting healers and wellness experts in various therapies and treatments.
- Asia has some of the fastest growing beauty markets in the world, and the spa industry reflects this consumer interest. Cosmoprof Asia, the premier beauty and spa event of Asia, grows every year in size and scope. Asian spas, focused on the beauty aspect of wellness, have expanded their services to meet a growing demand for cosmetic enhancements. Consumers from Korea to China to India are sophisticated in what they seek and expect results in their spa and beauty treatments. Less stringent industry regulation sometimes allows the region’s spa industry to offer technology-enhanced treatments that may not be available in North America and Europe.

## Thermal/Mineral Springs

- With its vast thermal resources and bathing traditions dating back more than a thousand years, Asia is home to the largest thermal/mineral springs markets in the world. Countries are recognizing the potential of springs for wellness tourism and economic development, and a growing number of destinations (including Japan, Taiwan, New Zealand, Australia, Vietnam, and Laos) are highlighting their hot springs attractions to international visitors.
- The Chinese hot spring sector, while enormous, mainly caters to domestic visitors. The industry comprises the remnants of historic Soviet-style sanatoria, rustic day-use hot springs/traditional bathhouses, and privately-owned and operated hot springs resorts and towns focused on recreation and family holidays. In order to raise standards and industry quality, China has established a national hot spring committee and regulations related to water quality, safety management, and the rating of “hot springs towns.” Over the past five years, the industry has experienced strong growth, changing business models, and increased private investment, encouraged by rising consumer interest in healthy lifestyles and wellness tourism on the one hand, and government support for preventive health on the other hand. There are opportunities to upgrade existing facilities to world-class standards, and to integrate TCM with European-style hydro/balneotherapy to create Chinese-style hot spring wellness resorts. Some resorts also see potential for packaging employer-sponsored hot springs wellness holidays, developed as part of companies’ employee wellness programs, which can create additional revenue for the sector (especially in the low seasons).



- While Japan's hot spring inns are gaining in popularity among international tourists, most of these properties continue to operate in their traditional style, without facility upgrades or modernization of offerings to cater to a rising clientele of international wellness tourists. Recently, the industry has received substantial new investments in preparation for a visitor surge for the 2020 Tokyo Olympics. These include new high-end bathing facilities and hotels/resorts with onsen in the center of Tokyo, and several large hotel brands such as InterContinental and Marriott opening new properties with their own private and communal hot springs.
- Elsewhere in East Asia, South Korea and Taiwan also have active hot springs sectors and traditions, evolving out of historical Japanese cultural influence. In recent years, Taiwan's hot springs sector has benefitted from aggressive tourism promotion to attract international visitors, families, wellness tourists, and even the MICE market. The sector is also actively linking hot springs to other types of tourism and interests. Taiwan hosts an annual Hot Spring & Fine Cuisine Festival, and a healthy hot spring cuisine concept has emerged focusing on locally-sourced fresh fish and vegetables. Hiking to one of Taiwan's more than 100 wild/undeveloped hot springs has also become a popular niche wellness tourism activity.
- Australia and New Zealand are leveraging their thermal resources aggressively for tourism promotion. The Peninsula Hot Springs in Australia is undergoing a significant expansion that will add overnight accommodations, new hot pools, ice cave/plunge pools, a group sauna area, an amphitheater, a "Food Bowl" that will promote organic produce, and expanded wellness programming. It is also working to create an official hot springs region near its location in Victoria. New Zealand is developing the city of Rotorua as a wellness destination focusing on its healing hot springs and mineral baths. The government is co-investing with private investors in a new hot spring facility (total investment US\$21.5m) on the lakefront, with the aim of developing a world-class spa, a thermal, and wellness tourism district with linkages to the local Maori culture. Other thermal springs around the country (e.g., Te Aroha and Okoroire) are seeking investments to upgrade facilities and create new destinations for luxury and short-break tourism.
- South and Southeast Asian countries also have considerable thermal resources but are generally at earlier stages of development. In recent years, governments that have designated hot spring areas for tourism development include Thailand (Klong Thom as a pilot "spa city"), Cambodia (Kampong Speu province), and Laos (Hiem district hot springs in Huaphan province). India has hundreds of hot springs, many of which are located near temples with religious significance. In 2016, the State of Uttarakhand tourism department announced plans to develop the region as a thermal wellness destination, with world-class facilities to be built across five thermal sites (including spa complexes, golf courses, yoga and meditation centers, etc.). In Bhutan and Nepal, thermal springs traditionally have been used for medical and therapeutic purposes (rather than recreation), and they are therefore tied to the indigenous healing systems and spiritual heritage and remain rustic and undeveloped. There is an emerging interest in Nepal to further develop these resources into wellness tourism destinations by tying thermal bathing with yoga, Ayurveda, and even shamanism.



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