



GLOBAL WELLNESS
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EMPOWERING WELLNESS WORLDWIDE

DATA FOR 2019-2022

The Global Wellness Economy: Japan



The Global Wellness Economy: JAPAN

DATA FOR 2019-2022



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About the Global Wellness Institute

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

www.globalwellnessinstitute.org

About the Authors

The Global Wellness Economy: Japan was prepared by Katherine Johnston, Ophelia Yeung, and Tonia Callender. As GWI's principal researchers, they are the team that has defined and measured the size of the global wellness economy and its sectors over the last fifteen years. Their academic and professional background is in economic analysis, international development, and public policy. Ms. Johnston, Ms. Yeung, and Ms. Callender received post-graduate degrees from Georgetown, Princeton, and Harvard Universities, respectively. Together, they bring many decades of experience conducting research, impact assessments, and strategy development for countries, regions, industry consortia, companies, and nonprofit institutions around the world.

PREFACE

What Is Wellness?

Wellness is a modern word with ancient roots. The key tenets of wellness as both preventive and holistic can be traced back to ancient civilizations from the East (India, China) to the West (Greece, Rome). In 19th century Europe and the United States, a variety of intellectual, religious, and medical movements developed in parallel with conventional medicine. With their focus on holistic and natural approaches, self-healing, and preventive care, these movements have provided a firm foundation for wellness today. Wellness-focused and holistic modalities have gained more visibility since the 1960s/1970s under the writings and thought leadership of an informal network of U.S. physicians and thinkers (such as Halbert Dunn, Jack Travis, Don Ardell, Bill Hettler, and others). As these have evolved, proliferated, and gone mainstream, they have informed the healthy-living, self-help, self-care, fitness, nutrition, diet, and spirituality practices that have become a flourishing wellness movement in the 21st century.

The Global Wellness Institute (GWI) defines wellness as: ***the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health.***

There are two important aspects to this definition. First, wellness is not a passive or static state, but rather an “active pursuit” that is associated with intentions, choices, and actions as we work toward an optimal state of health and well-being. Second, wellness is linked to holistic health – that is, it extends beyond physical health and incorporates many different dimensions that should work in harmony (see figure).

Wellness is an individual pursuit – we have self-responsibility for our own choices, behaviors, and lifestyles – but it is also significantly influenced by the physical, social, and cultural environments in which we live. Research on the determinants of health indicates that environmental, socioeconomic, and lifestyle factors can account for 80-90% of our disease risks and health outcomes.

Wellness is often confused with terms like health, well-being, and happiness. While there are common elements among them, wellness is distinguished by not referring to a static state of being (i.e., being happy, in good health, or a state of well-being). Rather, wellness is associated with an active process of being aware and making choices that lead toward an outcome of optimal holistic health and well-being.

Wellness Is Multidimensional



PREFACE

What Is the Wellness Economy?

The Global Wellness Institute (GWI) defines the wellness economy as **industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives**. In our definition, the wellness economy encompasses eleven varied and diverse sectors.

GWI first pioneered this concept and measured the wellness economy in the 2014 *Global Wellness Economy Monitor*, when we estimated wellness as a \$3.4 trillion industry in 2013. To our knowledge, this was the first time that wellness was defined and measured as a global industry, with underlying sector-level and country-level data. Since then, we have published updated figures on the wellness economy for 2015, 2017, 2019, and 2020. The overall wellness economy definition, framework, and measurement methodology have not changed over the last decade, but we have made a few key expansions:

- In our 2013 dataset, we only provided regional and country-level data for three sectors (wellness tourism, spas, and thermal/mineral springs). Over time, we have expanded the depth and breadth of our research, and we have provided detailed regional- and country-level data for additional sectors every time we have published the *Global Wellness Economy Monitor*.
- In our 2020 dataset, we added mental wellness as an eleventh sector in the wellness economy (previously our figures had included ten sectors). We also significantly expanded our definition and measurement of the physical activity sector (previously this sector was defined more narrowly as “fitness & mind-body” only).
- In our 2020 dataset, we expanded our regional- and country-level data collection to cover all eleven sectors. For the first time, this allowed us to release aggregated wellness economy figures for every country and region (rather than just at the global level).

Our wellness economy framework and data are grounded in our numerous in-depth sector-level studies, starting with our first study on the global spa industry in 2008. Since then, we have conducted pioneering research on the following seven wellness sectors: **spas, thermal/mineral springs, wellness tourism, workplace wellness, wellness real estate, physical activity, and mental wellness**. For each of these sectors, we have created a conceptual framework to define the sector and its boundaries, and we conduct original, country-level research to estimate the market size and arrive at globally aggregated figures. To our knowledge, these are the only studies that have estimated the size of these sectors across all countries in the world, using a consistent framework.

In addition to the seven wellness sectors where we have done in-depth study, we also produce original country-level and global estimates for four other sectors: **personal care & beauty; healthy eating, nutrition, & weight loss; public health, prevention, & personalized medicine; and traditional & complementary medicine**.

For more information and GWI's most recent data and analysis for the global wellness economy, see: <https://globalwellnessinstitute.org/industry-research/>.

PREFACE

Research Methodology and Scope

The global wellness economy and sector data presented in this report are for the years 2019, 2020, 2021, and 2022. The definitions, conceptual frameworks, and estimation models for each of the wellness sectors are developed by the authors under the auspices of the Global Wellness Institute (GWI), consistent with the data and methodologies used in prior GWI studies over the last fifteen years.

Our dataset covers the entire world (218 countries, territories, and markets). The authors have developed original, country-level data estimates for nine wellness economy sectors (spas; thermal/mineral springs; wellness tourism; workplace wellness; wellness real estate; physical activity; mental wellness; traditional & complementary medicine; and public health, prevention, & personalized medicine), based on GWI's proprietary models and databases and drawing on a wide variety of primary and secondary data sources. Figures for the other two wellness sectors (personal care & beauty, and healthy eating, nutrition, & weight loss) follow GWI's customized definitions and conceptual framework, but they are aggregated primarily from Euromonitor and other secondary sources.

The analysis is based on extensive primary and secondary research conducted from January to September 2023, including literature reviews, data research, and expert interviews. Key public and private sources consulted include: Euromonitor International, World Bank, International Monetary Fund (IMF), World Health Organization (WHO), International Labour Organization (ILO), World Travel & Tourism Council (WTTC), World Tourism Organization (UNWTO), Statista, Eurostat, U.S. Bureau of Labor Statistics, U.S. National Institutes of Health, International Spa Association (ISPA), International Health, Racquet, & Sportsclub Association (IHRSA), International Coaching Federation (ICF), and many other organizations. Other sources include global travel promotion and booking websites; numerous industry-specific organizations, databases, publications, and media sources (e.g., the Global Wellness Trends Reports by the Global Wellness Summit, Spa Business Handbook, Spa Business Magazine, Club Industry, Health Club Management, etc.); and dozens of government ministries and statistical agencies in countries around the world.

The authors have also benefited from the industry insights and technical inputs from several Global Wellness Institute Initiatives, including: Hot Springs Initiative, Mental Wellness Initiative, Wellness Tourism Initiative, Wellness Communities & Real Estate Initiative, and Workplace Wellbeing Initiative.

Note that the 2019 and 2020 wellness economy figures presented in this report have been revised and are slightly different from the figures presented in the previous edition of the *Global Wellness Economy Monitor* (released in 2021) and related country reports. These adjustments were made for a number of reasons, including changes in sector definitions and measurements to reflect the evolution of the wellness market, as well as revisions in the underlying data sources that are used for making GWI's estimates for certain sectors.

For more details on the data presented in this report, including global/regional data and sectoral breakdowns, see: *The Global Wellness Economy Monitor (2023)*, <https://globalwellnessinstitute.org/industry-research/global-wellness-economy-monitor-2023/>.

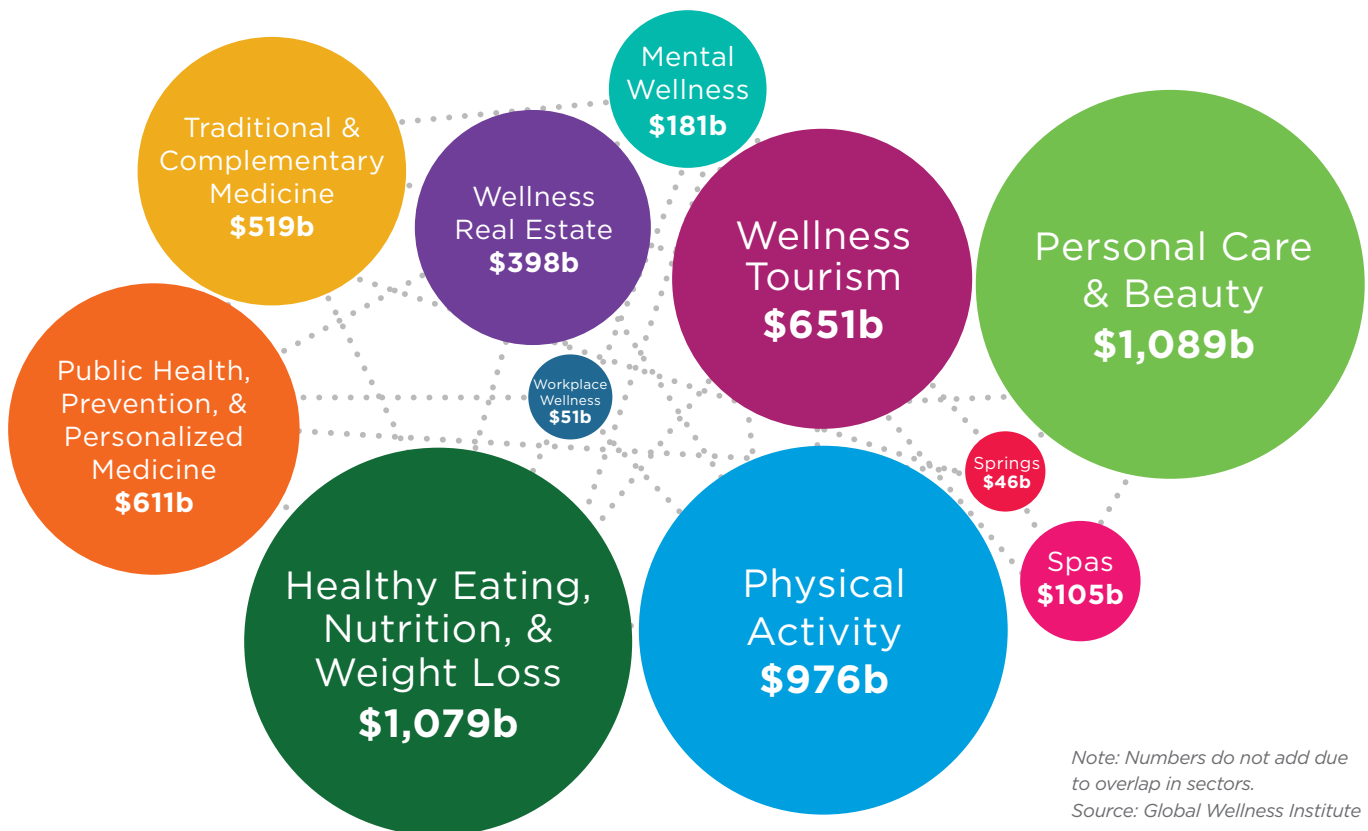
CHAPTER 1

The Global Wellness Economy

\$5.6 trillion
Global Market
In 2022

12.1%
CAGR
2020-2022

GLOBAL WELLNESS ECONOMY: \$5.6 trillion in 2022

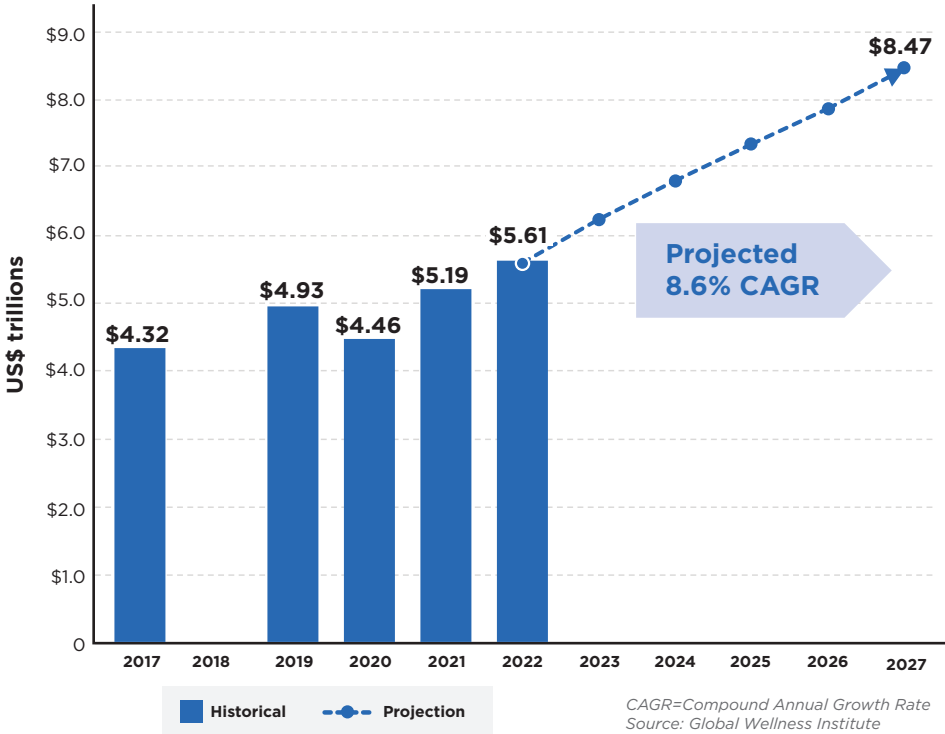


The global wellness economy is recovering strongly from the pandemic and reached \$5.6 trillion in 2022.

Like most industries, the global wellness economy has experienced major shifts and disruptions over the last few years in the wake of the COVID-19 pandemic. Prior to 2020, the wellness economy was growing strongly, and faster than overall economic growth, for many years. In 2019, the wellness economy reached \$4.9 trillion. In 2020, it fell by 9.5% to \$4.46 trillion, due to the pandemic. By comparison, global GDP fell by only 2.7% in 2020.¹ The year 2020 has become a watershed year that will forever divide history (and the wellness economy) into “before” and “after” COVID-19.

The good news is that the wellness economy has recovered quickly from the massive economic shock of 2020. Most (but not all) of the eleven wellness economy sectors have recovered and now surpass their pre-pandemic levels. **In 2022, the global wellness economy stands at \$5.6 trillion dollars, nearly 14% larger than its size in 2019.** The wellness economy grew robustly by 16.5% in 2021 in its initial phase of recovery from the pandemic, and then growth tapered off to 8.1% in 2022. By comparison, global GDP grew by 13.5% in 2021 and 4.1% in 2022. The global wellness economy and all of the wellness sectors are poised for strong ongoing recovery and growth in the coming years, fueled by a long-term trend of rising consumer interest in and need for wellness, which has only accelerated since the pandemic.

Global Wellness Economy Market Size and Growth Projections, 2017-2027



¹ Global GDP data from: IMF, *World Economic Outlook Database*, April 2023 Edition, <https://www.imf.org/en/Publications/WEO/weo-database/2023/April>.

North America (\$1.9 trillion), Asia-Pacific (\$1.7 trillion), and Europe (\$1.5 trillion) together account for 90% of the entire global wellness economy. Per capita spending on wellness is significantly higher in North America (\$5,108) and Europe (\$1,596) than in other regions of the world. In 2022, North America has surpassed Asia-Pacific to become the largest regional wellness economy, a shift that has occurred due to relatively slower growth and recovery in some major Asian markets, as well as the prolonged pandemic restrictions and travel bans in China and Japan through 2022.

As of 2022, the wellness economies across all regions have recovered to and surpassed their pre-pandemic/2019 levels. It can be challenging to compare the regional growth rates in 2020-2022 as a metric for which markets have been growing fastest, because the growth trends during this period reflect recovery from the pandemic dip in 2020 – and so regions with the greatest declines in 2019-2020 are likely to have higher growth rates in 2020-2022. A better metric for growth is to examine the extent to which each region has surpassed its pre-pandemic level. The regions that have shown the strongest resilience, recovery, and growth since before the start of the pandemic are North America (now at 123% of its 2019 level), Europe (114%), and Middle East-North Africa (119%). The other three regions are now at 106-107% of their 2019 levels.

Wellness Economy by Region 2019-2022

| | Wellness Economy | | | | Per Capita 2022 | Average Annual Growth Rate | |
|--------------------------|------------------|------------------|------------------|------------------|-----------------|----------------------------|--------------|
| | (US\$ billions) | | | | | 2019-2020 | 2020-2022 |
| | 2019* | 2020* | 2021 | 2022 | | | |
| North America | \$1,551.1 | \$1,463.1 | \$1,692.3 | \$1,901.4 | \$5,108 | -5.7% | 14.0% |
| Asia-Pacific | \$1,589.8 | \$1,468.5 | \$1,653.7 | \$1,698.1 | \$399 | -7.6% | 7.5% |
| Europe | \$1,293.9 | \$1,133.4 | \$1,383.7 | \$1,469.7 | \$1,596 | -12.4% | 13.9% |
| Latin America-Caribbean | \$297.3 | \$219.0 | \$263.7 | \$314.4 | \$476 | -26.3% | 19.8% |
| Middle East-North Africa | \$122.2 | \$110.5 | \$126.0 | \$145.4 | \$273 | -9.6% | 14.7% |
| Sub-Saharan Africa | \$77.6 | \$69.0 | \$73.9 | \$82.6 | \$68 | -11.0% | 9.4% |
| WORLD | \$4,931.7 | \$4,463.5 | \$5,193.3 | \$5,611.6 | \$706 | -9.5% | 12.1% |

* 2019 and 2020 figures have been revised since GWI released the previous version of the Wellness Economy Monitor.

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

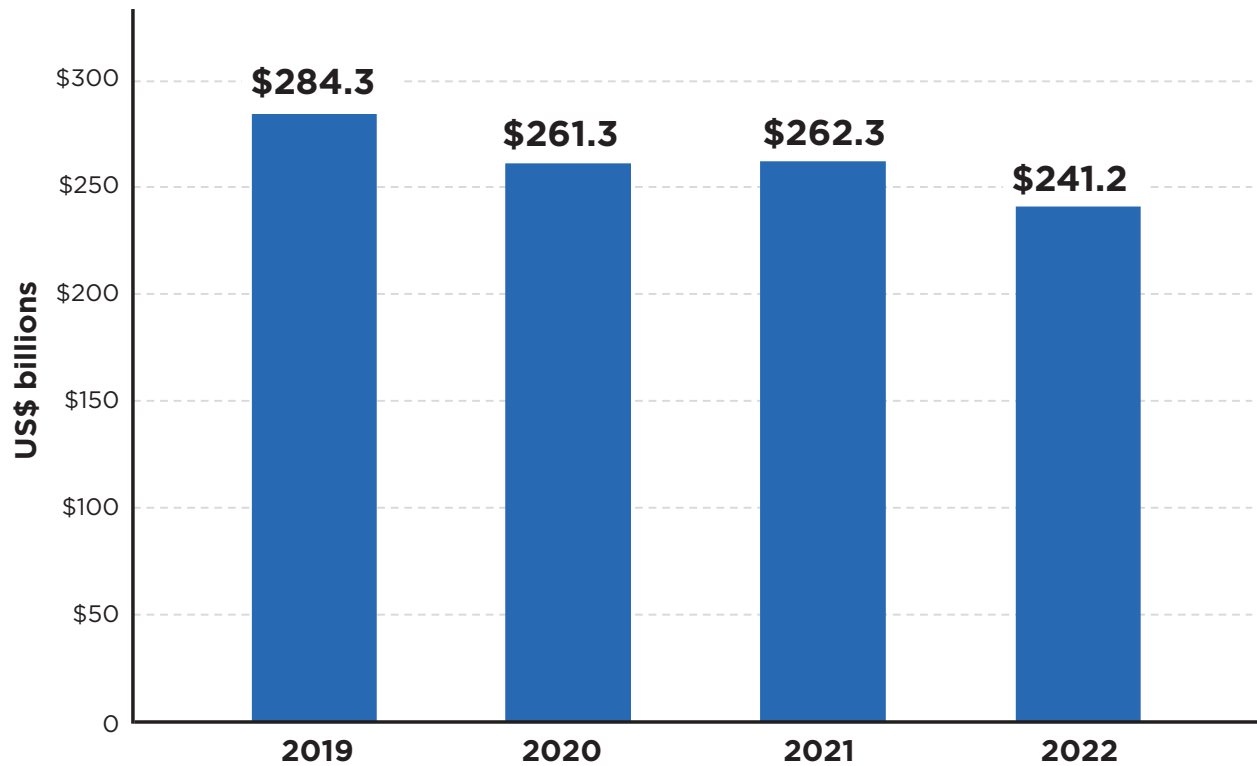
Source: Global Wellness Institute, based extensive primary research and secondary data sources.

CHAPTER 2

The Wellness Economy in Japan

| | | |
|--|---|--|
| \$241.2b Wellness Economy In 2022 | #4 Global Rank Out of 218 Countries Worldwide | #2 Regional Rank Out of 45 Countries In Asia-Pacific |
|--|---|--|

Japan: Wellness Economy Market Size
2019-2022



Source: Global Wellness Institute

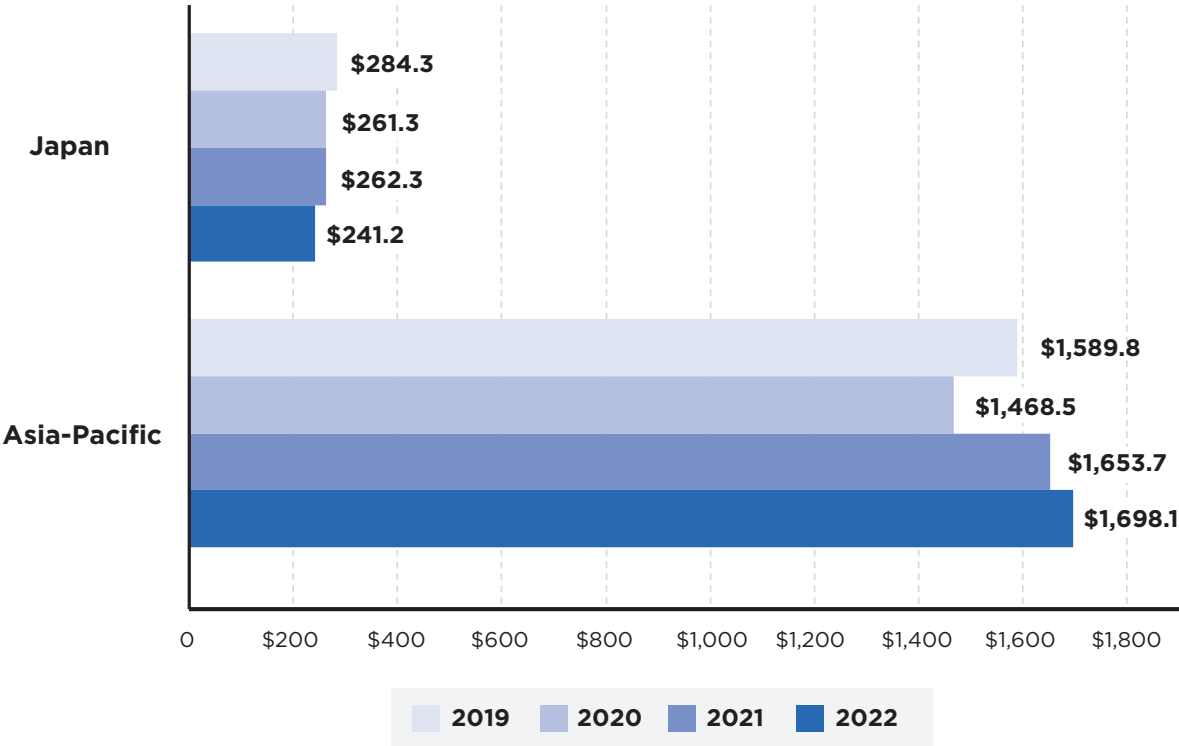
A. Overview of Japan's Wellness Economy

Wellness Economy Top Line Data for Japan 2019-2022

| | 2019 | 2020 | 2021 | 2022 |
|--|----------------|----------------|----------------|----------------|
| Wellness Economy (US\$ billions) | \$284.3 | \$261.3 | \$262.3 | \$241.2 |
| Wellness Economy Regional Ranking <i>(out of 45 countries in Asia-Pacific)</i> | #2 | #2 | #2 | #2 |
| Wellness Economy Global Ranking <i>(out of 218 countries worldwide)</i> | #3 | #3 | #3 | #4 |
| Wellness Economy Per Capita (US\$) | \$2,252 | \$2,070 | \$2,087 | \$1,927 |
| Wellness Economy as a % of Country GDP | 5.54% | 5.18% | 5.24% | 5.70% |

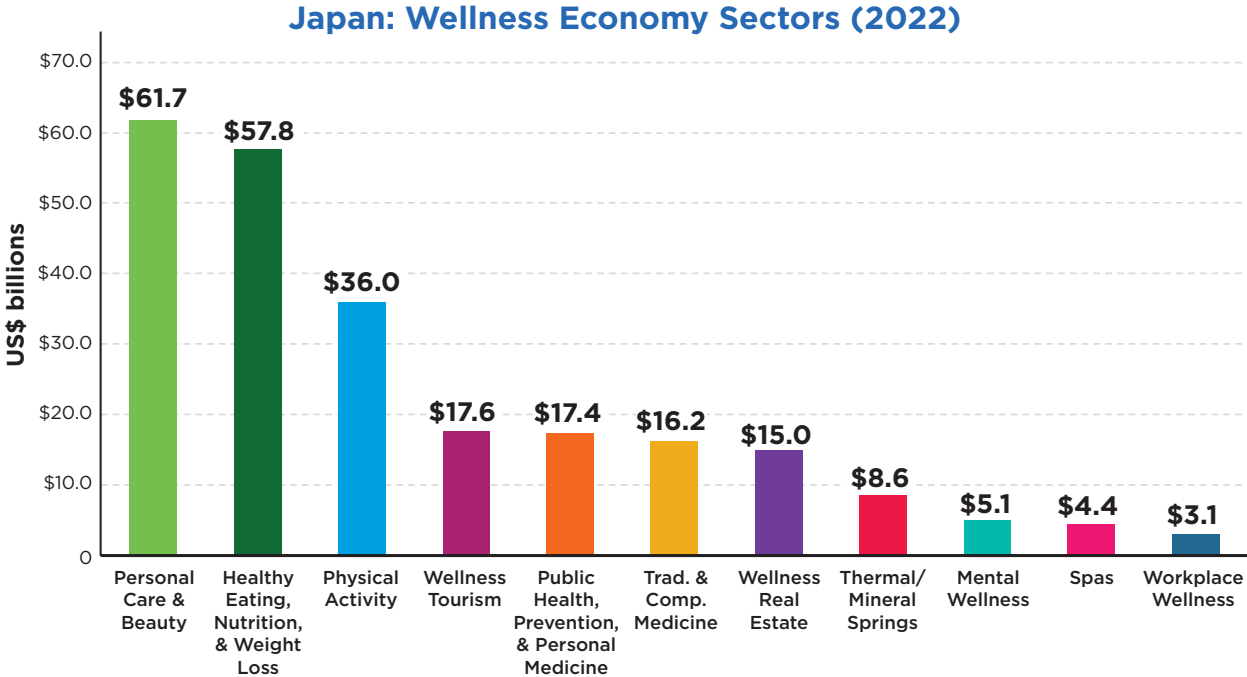
Note: Figures for the eleven sectors shown on the following pages do not sum to the country total due to overlap in sectors.
Source: Global Wellness Institute (based on extensive primary research and secondary data sources); IMF World Economic Outlook, April 2023 Edition (GDP data); World Bank World Development Indicators (population data).

Wellness Economy: Japan and Asia-Pacific 2019-2022



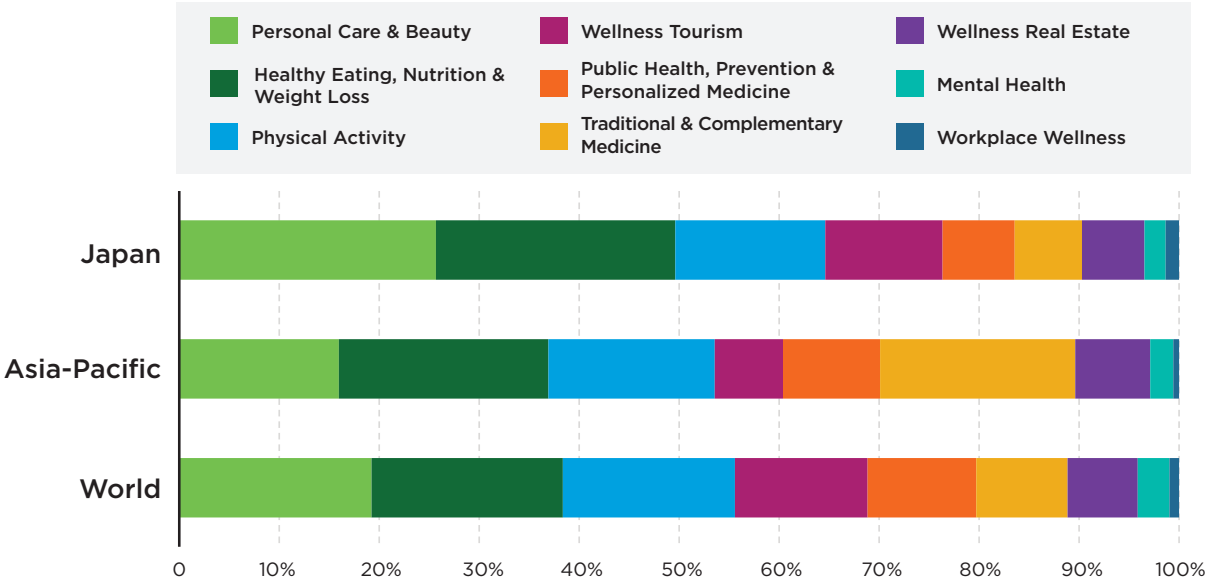
Source: Global Wellness Institute

B. Wellness Economy Sectors in Japan



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

Composition of the Wellness Economy (2022)



Source: Global Wellness Institute

Wellness Economy Sectors in Japan 2019-2022

| | Market Size (US\$ billions) | | | | Global Rank | Average Annual Growth Rate | |
|--|--------------------------------|-----------------|-----------------|-----------------|-------------|----------------------------|--------------|
| | 2019 | 2020 | 2021 | 2022 | 2022 | 2019-2020 | 2020-2022 |
| Personal Care & Beauty | \$72.65 | \$71.39 | \$70.78 | \$61.71 | #2 | -1.7% | -7.0% |
| Healthy Eating, Nutrition, & Weight Loss | \$69.26 | \$70.48 | \$68.85 | \$57.78 | #3 | 1.8% | -9.5% |
| Physical Activity | \$44.59 | \$40.28 | \$40.49 | \$35.98 | #5 | -9.7% | -5.5% |
| Wellness Tourism | \$26.55 | \$10.26 | \$10.59 | \$17.65 | #6 | -61.4% | 31.1% |
| Public Health, Prevention, & Personalized Medicine | \$17.62 | \$19.51 | \$19.87 | \$17.41 | #6 | 10.7% | -5.5% |
| Traditional & Complement. Medicine | \$18.23 | \$17.91 | \$18.18 | \$16.22 | #5 | -1.8% | -4.8% |
| Wellness Real Estate | \$7.60 | \$11.47 | \$13.21 | \$14.99 | #6 | 51.1% | 14.3% |
| Thermal/Mineral Springs | \$14.21 | \$9.22 | \$8.60 | \$8.59 | #2 | -35.1% | -3.5% |
| Mental Wellness | \$4.69 | \$4.70 | \$5.11 | \$5.07 | #5 | 0.3% | 3.8% |
| Spas | \$6.14 | \$4.24 | \$4.83 | \$4.37 | #5 | -30.9% | 1.5% |
| Workplace Wellness | \$4.96 | \$3.70 | \$3.67 | \$3.13 | #3 | -25.4% | -8.1% |
| Wellness Economy | \$284.33 | \$261.32 | \$262.31 | \$241.17 | #4 | -8.1% | -3.9% |

*Note: Figures do not sum to total due to overlap in segments. Rankings are out of 218 countries worldwide.
Source: Global Wellness Institute, based on extensive primary research and secondary data sources.*

C. Details for Selected Wellness Economy Sectors in Japan

Wellness Real Estate



Wellness Real Estate Market in Japan: 2019-2022

| | Market Size (US\$ billions) | | | | Average Annual Growth Rate | |
|---|--------------------------------|----------|----------|----------|-------------------------------|---------------|
| | 2019* | 2020* | 2021 | 2022 | 2019- 2020 | 2020- 2022 |
| Total Construction Output | \$625.50 | \$628.99 | \$581.10 | \$557.72 | 0.6% | -5.8% |
| Wellness Real Estate | \$7.60 | \$11.47 | \$13.21 | \$14.99 | 51.1% | 14.3% |
| Percent of Construction Output with a Wellness Focus | 1.21% | 1.82% | 2.27% | 2.69% | N/A | N/A |

Source: Global Wellness Institute, based on construction output data from the United Nations.

Physical Activity



Physical Activity Market by Subsector in Japan: 2019-2022

| | Market Size (US\$ billions) | | | | Average Annual Growth Rate | |
|---------------------------------------|--------------------------------|----------------|----------------|----------------|-------------------------------|---------------|
| | 2019 | 2020 | 2021 | 2022 | 2019- 2020 | 2020- 2022 |
| Recreational Physical Activity | \$21.86 | \$19.11 | \$18.76 | \$16.81 | -12.6% | -6.2% |
| Sports & Active Recreation | \$13.60 | \$12.46 | \$13.23 | \$11.83 | -8.4% | -2.5% |
| Fitness | \$6.27 | \$4.75 | \$3.64 | \$3.37 | -24.3% | -15.7% |
| Mindful Movement | \$2.00 | \$1.91 | \$1.88 | \$1.61 | -4.6% | -8.2% |
| Enabling Sectors | \$23.03 | \$21.62 | \$22.19 | \$19.68 | -6.1% | -4.6% |
| Sports Apparel & Footwear | \$14.43 | \$12.33 | \$12.37 | \$10.49 | -14.6% | -7.7% |
| Sports & Fitness Equipment | \$7.75 | \$8.16 | \$8.51 | \$7.75 | 5.3% | -2.5% |
| Fitness Technology | \$0.91 | \$1.25 | \$1.43 | \$1.55 | 36.4% | 11.3% |
| TOTAL | \$44.59 | \$40.28 | \$40.49 | \$35.98 | -9.7% | -5.5% |

Note: Figures do not sum to total due to overlap in segments and rounding. See Appendix for detailed descriptions of the subsectors.
Source: Global Wellness Institute.

Healthy Eating, Nutrition, & Weight Loss



Healthy Eating, Nutrition, & Weight Loss Market by Subsector in Japan: 2019-2022

| | Market Size (US\$ billions) | | | | Average Annual Growth Rate | |
|-----------------------------------|--------------------------------|----------------|----------------|----------------|-------------------------------|---------------|
| | 2019 | 2020 | 2021 | 2022 | 2019- 2020 | 2020- 2022 |
| Healthy-Labeled Foods & Beverages | \$54.74 | \$55.33 | \$53.76 | \$43.67 | 1.1% | -11.2% |
| Vitamins & Supplements | \$12.50 | \$13.16 | \$13.23 | \$12.42 | 5.3% | -2.9% |
| Weight Loss Products & Services | \$2.01 | \$1.99 | \$1.86 | \$1.69 | -1.2% | -7.9% |
| TOTAL | \$69.26 | \$70.48 | \$68.85 | \$57.78 | 1.8% | -9.5% |

Note: Figures may not sum to total due to rounding. See Appendix for detailed descriptions of the subsectors.
Source: Global Wellness Institute, based on data from Euromonitor, IBISWorld, and other sources.

Mental Wellness



Mental Wellness Market by Subsector in Japan: 2019-2022

| | Market Size (US\$ billions) | | | | Average Annual Growth Rate | |
|--|--------------------------------|---------------|---------------|---------------|-------------------------------|---------------|
| | 2019 | 2020 | 2021 | 2022 | 2019- 2020 | 2020- 2022 |
| Senses, Spaces, & Sleep | \$0.19 | \$0.22 | \$0.26 | \$0.29 | 17.5% | 15.0% |
| Brain-Boosting Nutraceuticals & Botanicals | \$1.04 | \$1.05 | \$1.00 | \$0.90 | 1.3% | -7.3% |
| Self-Improvement | \$2.02 | \$1.75 | \$2.27 | \$2.40 | -13.0% | 16.9% |
| Meditation & Mindfulness | \$1.45 | \$1.68 | \$1.58 | \$1.48 | 16.0% | -6.2% |
| TOTAL | \$4.69 | \$4.70 | \$5.11 | \$5.07 | 0.3% | 3.8% |

Note: Figures may not sum to total due to rounding. See Appendix for detailed descriptions of the subsectors.
Source: Global Wellness Institute, based on data from Euromonitor, ICF, NCCIH, and other sources.

Traditional & Complementary Medicine



Traditional & Complementary Medicine Market by Subsector in Japan: 2019-2022

| | Market Size (US\$ billions) | | | | Average Annual Growth Rate | |
|-------------------------------|--------------------------------|----------------|----------------|----------------|-------------------------------|---------------|
| | 2019 | 2020 | 2021 | 2022 | 2019- 2020 | 2020- 2022 |
| T&CM Services & Practitioners | \$14.08 | \$13.61 | \$13.94 | \$12.26 | -3.4% | -5.1% |
| T&CM Medicines & Products | \$4.15 | \$4.30 | \$4.23 | \$3.96 | 3.7% | -4.0% |
| TOTAL | \$18.23 | \$17.91 | \$18.18 | \$16.22 | -1.8% | -4.8% |

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

Source: Global Wellness Institute, based on data from Euromonitor, IBISWorld, and various national sources.

Public Health, Prevention, & Personalized Medicine



Public Health, Prevention, & Personalized Medicine Market by Subsector in Japan: 2019-2022

| | Market Size (US\$ billions) | | | | Average Annual Growth Rate | |
|----------------------------|--------------------------------|----------------|----------------|----------------|-------------------------------|---------------|
| | 2019 | 2020 | 2021 | 2022 | 2019- 2020 | 2020- 2022 |
| Public Health & Prevention | \$16.26 | \$18.02 | \$18.34 | \$15.80 | 10.8% | -6.4% |
| Personalized Medicine | \$1.36 | \$1.49 | \$1.53 | \$1.61 | 9.7% | 4.1% |
| TOTAL | \$17.62 | \$19.51 | \$19.87 | \$17.41 | 10.7% | -5.5% |

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

Source: Global Wellness Institute, based on data from the WHO, OECD, and other sources.

Thermal/Mineral Springs



Thermal/Mineral Springs Establishments and Revenues in Japan: 2019-2022

| | Market Size (US\$ billions) | | | | Average Annual Growth Rate | |
|---|--------------------------------|--------|--------|--------|-------------------------------|---------------|
| | 2019 | 2020 | 2021 | 2022 | 2019- 2020 | 2020- 2022 |
| Thermal/Mineral Springs Establishments* | 20,879 | 20,879 | 17,257 | 17,257 | 0.0% | -9.1% |
| Thermal/Mineral Springs Revenues (US\$ billions) | \$14.21 | \$9.22 | \$8.60 | \$8.59 | -35.1% | -3.5% |

* Number of establishments is updated every two years due to availability of data from Japanese government sources. See Appendix for detailed thermal/mineral springs definitions and descriptions.
Source: Global Wellness Institute.

Spas



Spa Establishments and Revenues by Type in Japan: 2019-2022

| | Spa Revenues (US\$ billions) | | | | Number of Spas | | | |
|-----------------------------------|---------------------------------|----------------|----------------|----------------|----------------|--------------|--------------|--------------|
| | 2019 | 2020 | 2021 | 2022 | 2019 | 2020 | 2021 | 2022 |
| Day/Club/Salon Spas | \$3.341 | \$2.296 | \$2.893 | \$2.459 | 4,166 | 4,005 | 4,000 | 3,982 |
| Hotel/Resort Spas* | \$1.465 | \$1.036 | \$0.834 | \$0.948 | 664 | 664 | 715 | 765 |
| Other Spas | \$0.652 | \$0.447 | \$0.564 | \$0.483 | 1,299 | 1,248 | 1,248 | 1,242 |
| Medical Spas | \$0.509 | \$0.350 | \$0.441 | \$0.374 | 391 | 375 | 375 | 373 |
| Thermal/Mineral Springs Spas | \$0.142 | \$0.092 | \$0.086 | \$0.086 | 1,044 | 1,044 | 862 | 862 |
| Destination Spas & Health Resorts | \$0.030 | \$0.021 | \$0.016 | \$0.017 | 3 | 3 | 3 | 3 |
| TOTAL | \$6.138 | \$4.243 | \$4.834 | \$4.367 | 7,567 | 7,339 | 7,203 | 7,227 |

* The number of hotel/resort spas stayed the same from 2019-2020 because we have no basis for determining whether there were any permanent closures in 2020, amidst all of the temporary shutdowns.
Note: Figures may not sum to total due to rounding. See Appendix for descriptions of the spa categories.
Source: Global Wellness Institute.

Wellness Tourism



Domestic and Inbound Wellness Tourism Trips and Expenditures in Japan: 2019-2022

| | Domestic and Inbound Wellness Trips | | | | Average Expenditures Per Trip |
|---|-------------------------------------|----------------|----------------|----------------|-------------------------------|
| | 2019 | 2020 | 2021 | 2022 | 2022 |
| Domestic | | | | | |
| Domestic Wellness Trips (millions) | 43.7 | 21.5 | 20.3 | 34.3 | \$503 |
| Domestic Wellness Trip Expenditures (US\$ billions) | \$22.21 | \$9.67 | \$10.52 | \$17.23 | |
| Inbound/International | | | | | |
| Inbound Wellness Trips (millions) | 1.824 | 0.231 | 0.014 | 0.225 | \$1,853 |
| Inbound Wellness Trip Expenditures (US\$ billions) | \$4.34 | \$0.60 | \$0.07 | \$0.42 | |
| Total Wellness Tourism | | | | | |
| Total Wellness Trips (millions) | 45.6 | 21.7 | 20.3 | 34.5 | \$512 |
| Total Wellness Trip Expenditures (US\$ billions) | \$26.55 | \$10.26 | \$10.59 | \$17.65 | |

Note: These figures include both primary and secondary wellness tourism trips. Figures may not sum to total due to rounding. See Appendix for wellness tourism category descriptions and definitions.

Source: Global Wellness Institute, based on tourism data from Euromonitor

Primary and Secondary Wellness Tourism Trips and Expenditures in Japan: 2019-2022

| | Primary and Secondary Wellness Trips | | | | Average Expenditures Per Trip |
|--|--------------------------------------|--------|--------|---------|-------------------------------|
| | 2019 | 2020 | 2021 | 2022 | 2022 |
| Primary | | | | | |
| Primary Wellness Trips (millions) | 6.1 | 2.1 | 3.0 | 4.9 | \$672 |
| Primary Wellness Trip Expenditures (US\$ billions) | \$4.63 | \$1.40 | \$2.04 | \$3.33 | |
| Secondary | | | | | |
| Secondary Wellness Trips (millions) | 39.5 | 19.6 | 17.3 | 29.5 | \$485 |
| Secondary Wellness Trip Expenditures (US\$ billions) | \$21.92 | \$8.87 | \$8.55 | \$14.32 | |

Note: These figures combine both inbound/international and domestic wellness tourism trips. Figures may not sum to total due to rounding. See Appendix for wellness tourism category descriptions and definitions.

Source: Global Wellness Institute, based on tourism data from Euromonitor.

Appendix: Wellness Economy Definitions

1. The Wellness Economy and Its Eleven Sectors

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

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

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

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

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

- Vitamins and dietary supplements (including herbal/traditional products) and sports nutrition products.
- Weight loss/management products and services, including: packaged foods/beverages specifically positioned to target weight management; over-the-counter supplements and remedies targeting weight management (e.g., meal replacement or nutritional supplement drinks, non-prescription weight-loss drugs and supplements); and weight loss services and programs (e.g., physical or online dieting centers, workshops, counseling; nutritionists and dieticians).
- Healthy-labeled foods and beverages, which encompasses a wide variety of processed and packaged foods and beverages that are specifically positioned, marketed or labeled with health and wellness claims, including low-sugar/low-fat/low-carb products; fortified/functional products with added nutrients (e.g., calcium, omega-3); products that are “free from” gluten/lactose/dairy/meat (e.g., plant-based alternatives, meat substitutes); products marketed as “naturally healthy” (e.g., high fiber, fermented, nuts/seeds); and organic products.

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

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

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

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

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

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

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

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

2. Physical Activity

Recreational Physical Activities

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

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

- **Participation in recreational physical activities:** The estimated percent of the population that participates in each category of recreational physical activity. In our dataset, “participation” is generally defined as doing the activity at least once a month or with some regularity. The participation estimates are agnostic of *where* or *how* people perform the activity. For example, people who do yoga may take a class at a specialized yoga studio, may take a class at a gym or YMCA, may use a streaming or on-demand class, or may simply practice yoga alone at home. For our estimates, all of these methods would count as “participation in yoga” if they are done with regularity.
- **Consumer spending on recreational physical activities:** The estimated direct, out-of-pocket expenditures by consumers each year in order to participate in each category of recreational physical activity. This figure is limited to expenditures on services for actually doing an activity – i.e., gym or studio memberships, fees for classes and training, sports team or club dues, entry fees for events/competitions/tournaments, and other associated services. Non-service expenditures are measured in separate, supporting categories (as described below). In some instances, fees may be subsidized (such as in facilities/programs run by nonprofits or local governments), and in these instances the study still counts consumer *participation* in the activity although out-of-pocket expenditures would be reduced or possibly zero. Likewise, for some activities there is no service provider or participation fee (for example, running in the park or playing a pickup basketball game with friends), and in these instances the study counts consumer *participation* in the activity although the expenditures are zero.

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

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

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

Physical Activity Enabling Sectors

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

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

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

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

3. Mental Wellness

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

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

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

Brain-boosting nutraceuticals & botanicals: Includes products that we ingest or put into our bodies with the specific aim of improving our mental health and well-being. Many over-the-counter natural supplements, herbals and botanicals, and traditional remedies specifically claim to support better sleep, brain health, memory, energy, and overall mental wellness. A wide range of functional foods and beverages claim to

have brain health benefits, across nearly every packaged food and beverage category. There is growing interest in the potential of cannabis and its derivatives, psilocybin, and other plant-based and synthetic psychedelic drugs for both mental wellness and treatment purposes. A growing number of supplements and functional foods and beverages incorporate cannabis, hemp, CBD, THC, and medicinal mushrooms. (Note that our figures include only the legal, over-the-counter cannabis and cannabis derivatives market.) Most of the expenditures in this category overlap with the *healthy eating, nutrition, & weight loss* and *traditional & complementary medicine* sectors, and we account for this overlap when aggregating the figures for the overall wellness economy.

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

4. Wellness Tourism

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

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

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

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

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

5. Spas

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

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

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

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

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

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

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

6. Thermal/Mineral Springs

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

Types of Thermal/Mineral Springs Establishments

| Primarily Recreational | Primarily Wellness | Primarily Therapeutic or Curative |
|--|--|---|
| Thermal/mineral water swimming pool facilities | Thermal/mineral water bathing facilities | Health resorts and sanatoria that use thermal/mineral waters for treatments |
| Thermal/mineral water-based waterparks | Thermal/mineral water-based spas | |
| Hotels/resorts with thermal/mineral water swimming pools | Thalassotherapy spas and resorts | |
| Thermal or hot springs resorts | | |

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

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

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

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



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