



Japan is poised to take advantage of the growth in well-being tourism. Valued at US\$303.6 billion, Japan's wellness economy is the second-largest in the Asia-Pacific region and the third-largest in the world as of August 2023 - according to the Global Wellness Institute.

The wellness tourism market in Japan is expected to reach a projected revenue of US\$ 74.5 billion by 2030. A compound annual growth rate of 13.9% is expected the Japan wellness tourism market from 2023 to 2030.

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WELLNESS SNAPSHOT

Global Wellness Institute - Wellness
Tourism Initiative

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BEYOND CITIES, INTO WELLNESS, CULTURE AND HIDDEN TREASURES

Exploring Japan's forward-looking strategies to transform wellness tourism and foster regional growth in a sustainable post-pandemic era.

As tourism in Japan rebounds following the COVID-19 pandemic, the country has introduced a new initiative called '*Comprehensive Measures for the Prevention and Mitigation of Overtourism*'. This plan addresses issues such as overcrowding and tourist etiquette while encouraging international travel to less-visited regions through collaboration with local communities. Currently, almost half of all tourist stays (48%), according to McKinsey & Company's report *The Future of Japan's Tourism: Path for Sustainable Growth*—are concentrated in Tokyo, Kyoto, and Osaka. Japan's efforts aim to shift this pattern, promoting sustainable tourism practices and reducing the pressure on its most popular destinations.

A key component of this strategy involves steering travelers toward regional areas, fostering partnerships with local organizations, and adopting creative solutions to improve the tourism experience. These efforts align with the growing popularity of wellness tourism in Japan, as more visitors are drawn to experiences like traditional Japanese healing therapies, hot spring baths, and forest immersion activities. In fact, Japan's natural and cultural resources, including its famed hot springs and therapeutic forests, position the country to thrive in this sector, with wellness tourism poised to make a meaningful economic impact in the years ahead.

Expanding tourism in rural and lesser-known areas is essential to Japan's long-term goals. The government is exploring initiatives that connect healthcare facilities with nearby tourist attractions, particularly in areas beyond the country's major urban centers. This approach not only diversifies visitor experiences but also brings attention to hidden gems that are yet to gain international recognition.

Aiming to realize vibrant local communities, promotion to “create sustainable tourism destinations” is being implemented throughout Japan to create a virtuous cycle in local society and economy, with improving the quality of tourism, increasing the profitability and productivity of the tourism industry, and expanding the number of people interacting with the region.

The New Tourism Nation Promotion Basic Plan - Vision for 2025
Japan Tourism Agency



KEY SUCCESSSES

ZEN TOURISM

One notable success is the increasing popularity of Zen meditation as a form of tourism, blending ancient practices with modern travel experiences. Well-known destinations like Kyoto's Shunkoin Temple and Eihei-ji Temple in Fukui Prefecture offer structured meditation programs that attract international visitors. These programs typically include multi-day stays where guests can experience monastic life, take part in Zen tea ceremonies, and explore the peaceful temple grounds. Luxury resorts, such as Aman Kyoto, have also embraced Zen principles, offering meditation sessions alongside wellness treatments and opportunities to connect with nature.

NATURE TOURISM

Nature tourism in Japan has become a key success in the country's wellness tourism landscape, drawing travelers seeking to reconnect with the natural world for both physical and mental rejuvenation. Practices like shinrin-yoku, or forest bathing, have gained significant global recognition, offering visitors a chance to immerse themselves in the calming effects of Japan's lush forests. Japan is also known for its hot springs and bathing facilities, drawing tourists from all over the world. Onsen not only provides relaxation but also therapeutic benefits, with natural hot springs offering unique healing properties. In 2023, 28% of tourists reported bathing in a hot spring, with 48% planning to do so on their next visit to Japan, according to 2024 Japan Tourism Statistics.

NUTRITIONAL WELLNESS

Japanese cuisine is known for its emphasis on seasonal produce, freshness, and high quality ingredients. Many wellness retreats offer meals that are not only a feast for the senses but also cater to nutritional well-being. This shift is driven by a global interest in preventive health, with Japanese cuisine's emphasis on longevity and vitality appealing to those seeking to improve their health while traveling. Examples include the traditional kaiseki meal, a multi-course culinary journey that balances taste, texture, and presentation, and the Shojin ryori, a type of vegetarian Buddhist cuisine that dates back to the 13th century. These meals are crafted to enhance both physical and spiritual health, showcasing the Japanese philosophy of food as medicine.

MEDICAL TOURISM

To promote medical tourism in Japan, the government introduced medical visas in 2011, which were designed to increase accessibility for foreign patients to receive treatment, health check-ups, and simultaneously engage in sightseeing. Overall, Japan appears to have significant prospects for further growth. With the global rise in life expectancy, there is a growing demand for preventive medicine and treatment for lifestyle-related diseases. Japan leads the world in stem cell research and regenerative medicine. iPS cells, which were first developed by Japanese scientist Shinya Yamanaka, has spurred interest in medical tourism, as people from around the world are seeking advanced treatments available in Japan that involve iPS cells.

CRAFTING A TOURISM STRATEGY ROOTED IN JAPANESE HERITAGE

KEY CHALLENGES

Crowds, traffic congestion and rubbish are among the common complaints by Japanese residents of having too many tourists in their areas, according to a 2024 study by Jalan Research Center, which specializes in tourism. Indeed, research shows only a handful of historically popular areas in Japan experienced overtourism in 2024. By prefecture, the inbound tourist visit rate in 2023 was highest in Tokyo at 48.6%, followed by Osaka (43.5%), Chiba (36.1%), Kyoto (33.7%) and Fukuoka (13.4%). Every other destination in Japan, however, recorded a visit rate of single figures or less, according to data from the Japan National Tourism Organization (JNTO).

Accessibility remains a major issue due to the fact that many of the unexplored attractions of Japan are situated outside of the most visited urban areas. Therefore, investments in environmentally friendly infrastructure that promotes travel is necessary to reach the country's tourism vision for the future, and can also benefit local nearby communities.



KEY LEARNINGS

Japan is now actively promoting itself as a future wellness destination for those interested in this kind of health tourism, encouraging the country's resorts to offer "wellness" facilities to attract tourists. These include spas, yoga and meditation classes, and fitness programs. They also incorporate locally sourced healthy food options, recreational activities such as hiking, and opportunities for social interaction.

And of course, Japan's volcanic geology has blessed it with a plethora of hot springs, which have long provided the Japanese with a means to cleanse their bodies and refresh their souls. Visitors from overseas are increasingly venturing beyond Japan's cities and major tourist attractions to sample the attractions of rural and oceanside onsen resorts.

These initiatives are coinciding with a greater focus by companies and organizations on their employees' welfare and wellbeing, with many of them offering company-sponsored wellness breaks.

Some resorts are offering treatments and programs aimed at alleviating or curing specific illnesses and ailments, such as high blood pressure or respiratory problems.

OPERATOR EXCELLENCE



Zembo Seinei: A Zen Retreat offering meditation, yoga, and plant-based cuisine in a serene natural setting with a 360-Degree Panorama of Stunning Island Scenery of Awaji

Amanemu: The onsen resort of Amanemu offers ryokan-inspired suites and villas, each with a private onsen bath, and panoramic views of Ago Bay.

Beniya Mukayu Kaga: A traditional ryokan experience for an immersion into the philosophy of simplicity and mindfulness.

Aman Kyoto: A serene luxury retreat nestled in a hidden garden at the base of Kyoto's Hidari Daimonji mountain, offering refined minimalist design, immersive cultural experiences, and a tranquil connection to nature.

For more information contact
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