



Industry Briefing Papers 2016

ASIA: JAPAN

1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Tourism from abroad is one of the few promising businesses in Japan. According to the Japan National Tourism Organization (JNTO), foreign visitors to Japan doubled in last decade and reached 10 million people for the first time in 2013, led by increase of Asian visitors. In 2008, the Japanese government has set up Japan Tourism Agency and set the initial goal to increase foreign visitors to 20 million in 2020. In 2016, having met the 20 million target, the government has revised up its target to 40 million by 2020 when Tokyo hosts the Olympic Games. It requires an average growth of 19% per year for the next 4 years.

Japan Tourism Agency (JTA) reported that Over 75% of foreign tourists expect to have healthy Japanese cuisine and about 30% of them expects to experience Onsen (hot springs bathing). It definitely would be a great opportunity for spa and wellness tourism industries in Japan while this country is struggling with decrease in domestic population.

Additionally, by using White Paper of Leisure 2015, Economic Census 2014 and Onsen Utilization Report 2014 (Ministry of Environment), market size of Onsen as of FY 2014 can be roughly estimated 1.07 trillion yen (= about 10.5 billion U.S. dollars) which has increased by 34 percent from 2011. In like manner, by referring Annual Report of Service Industries Survey 2015 (Statistics Bureau) and the past Spa Services Surveys commissioned by Ministry of Economy, the annual turnover of spa services in Japan as of FY2015 can be estimated about 738 billion yen (= about 7.2 billion U.S. dollars) which has increased by 30 percent from FY2006 despite we experienced 2 times of severe damages in this decade such as the financial crisis in 2008 and tsunami caused by the Great East Japan Earthquake in 2011.

2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

Spas:

Encouraged by the strong trend of inbound tourism, we can see a stream of development plans and newly opened hotel spas all over the nation. Especially, some

prestigious Japan brands are opened in 2016 such as Hoshinoya Tokyo, The Prince Gallery Tokyo Kioicho, The HIRAMATSU Hotels & Resorts Kashikojima island and THE UZA TERRACE BEACH CLUB VILLAS. On the other hand, so many foreign hotel brands are going to be launched from 2017 to 2020 including 5 Marriot hotels (Karuizawa, Biwako, Izu-shuzenji, Fuji, Nanki-Shirahama), JW Marriot Nara and 2 Four Seasons Hotels (Kyoto, Otemachi in Tokyo).

Beauty:

Recently, hydrogen water products are dominating some beauty trade shows in Japan. Many of consumers believe it has a great effectiveness to protect from aging by antioxidant effects. On the other hand, almost of all electric appliance retailers set up the space only for beauty home appliances as it's very popular among many foreign tourists from Asian countries.

Fitness and Nutrition:

RIZAP, the emerging group of personal training gyms, succeeded to establish the style that they are absolutely committed to producing results toward the body what their clients required, by customized 1-on-1 exercise programs, personal trainer's dietary control with nutrition, all under the guidance of a nationally-registered dietitian.

Wellness Tourism:

Ministry of Environment (MOE) has just launched a so-called "Onsen Office" (Hot Spring Conservation and Use Promotion Office). This is the first time for the ministry to set up such an official office which is dedicated in Onsen promotion only though they have been designated People's Recreation Spas along with Onsen Hot Springs since 1948 and 94 sites had designated today. Thanks to them, everyone can access to genuine wellness resorts fulfilled with the national standard including (1) excellent quality & volume of hot springs water, (2) with bountiful natural environment, (3) supported by medical doctors who has the expertise of balneo-therapeutics etc. In order to educate people how to use Onsen effectively, MOE also provide the guidebook with research evidence on the balneo-therapy.

Wellness Communities or Real Estate:

With universities, farmers, hospitals, nursing care institutes, tourism related companies and municipalities, the Ministry of Economy set up 21 regional committees for creating innovative business to solve the health issues related with aging of population in each region including committees for creating healthcare services in Hokkaido (including agricultural wellness etc.), for bridging global wellness in Okinawa Island (with utilizing regional natural resources including sea minerals, regional flora and fauna etc.), for Kurort walking wellness in Yamagata prefecture, and so on.

3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?

“Onsen - hot spring bathing”, “Zen - meditation & spirit training”, “Shiatsu - traditional treatment”, “Japanese cuisines - genuinely healthy food” are the key wellness drivers and those have been brought significant contributions not only for Japan but also for the global wellness economy.

4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?

To spread and familiarize the wellness activities at the workplace would be the biggest challenge because Japanese are well-known as workaholic characteristic. Since 2014, Ministry of Economy and Tokyo Stock Exchange have been designated 25 companies as “Corporate Health Achievement Award Winners” from listed 3600 enterprises every year, in order to stimulate investors for wellness oriented companies. (*US have been conducting similar activities for S&P 500 companies.) This activity is based on the international theory propounded by “The Healthy Company” written by Robert H. Rosen (1992).

5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.

There are some organizations related with “wellness” and “well-being” in Japan such as Japan Wellness Foundation, Wellness Japan, Japan Wellness Society, NPO Well-Being etc. And many of them follow the terms/concepts advocated by WHO. However, almost all Japanese people cannot distinguish or tell about terms/concepts of them accurately.

SUBMITTED BY:

Name: Tomonori Maruyama (MARU)
Title: Manager / Chief Research Consultant
Company: Mitsui Knowledge Industry Co., Ltd.
Email: maruyama-tomonori@mki.co.jp
Phone Number: +81 (0)90 1535 6055

