



GLOBAL WELLNESS
SUMMIT 2019



J Wellness: The Future of Wellness in Japan



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2019 Global Wellness Summit Co-Chair





Japan: Five Wellness Market Opportunities

1) Incredible Assets for Inbound Wellness Tourism Boom

2) Japanese Beauty (J-Beauty): Back in the Limelight

3) The Future is Wellness Communities: Japan's Opportunity in Smart, Connected, Healthy Homes and Cities

4) The Age-Tech Opportunity: Beyond Millennials

5) Japan is a Workplace Wellness Leader; Though Mental Wellness is a Work in Progress

Incredible Assets for Inbound Wellness Tourism Boom



Assets for Inbound Wellness Tourism Boom

Hot Springs

US\$56bn Global Market
20,972 “Onsens”
(2/3 of global market)

Japanese

Temples/Monasteries
Open to Tourists

Forest bathing
(Shinrin-yoku)

Traditional Onsens can
expand to offer more holistic
Wellness experiences

**Japan’s Ryokan/Onsen
culture** satisfies the rustic,
authentic and hyper-specific
Asian Wellness experience

Visitors can access inner
Zen through meditation,
silence and vegetarian
cuisine at Buddhist
monasteries.

Japan offers the opportunity
to experience this at the
source



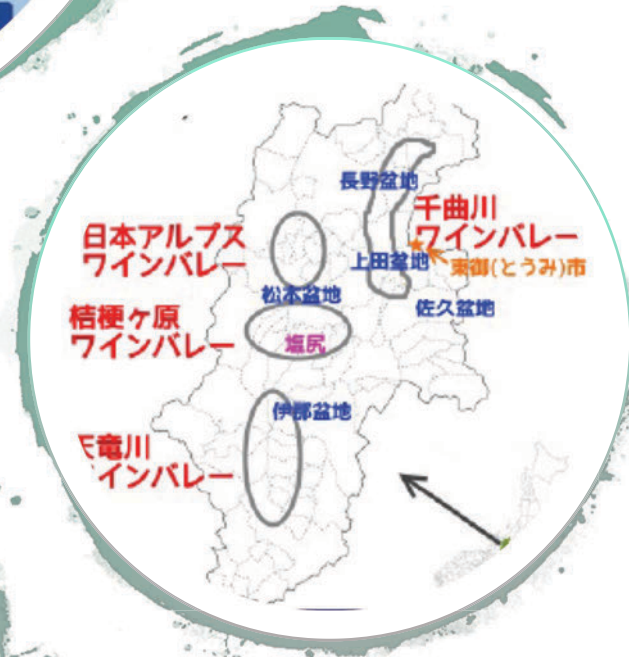
Japanese Beauty: Back in the Limelight

- “J-Beauty” seeing a global surge that looks to be a huge, long-term global opportunity, given its high-tech and high-nature approaches, that dovetail with **consumers embracing natural, functional, non-toxic, sustainable ingredients**



Japan's Opportunity in Smart, Connected, Healthy Homes and Cities

- Where we live determines 80-90% of our health outcomes
- Of the \$134.3bn 2017 global Wellness real estate & communities market, Japan's portion was US\$2.2bn, ranking Japan tenth globally by market size



Forest Bathing in the Middle of the Tokyo District



Tokyo Station



Shared electric mini car



Telework only 1 hour from Tokyo-Karuizawa



Super-Ageing Nation: The Age-Tech Opportunity

Ageing rebranded as cool.

Products and services for older people is a US\$15T market - Japan is leading the way as the world's ageing "test market".

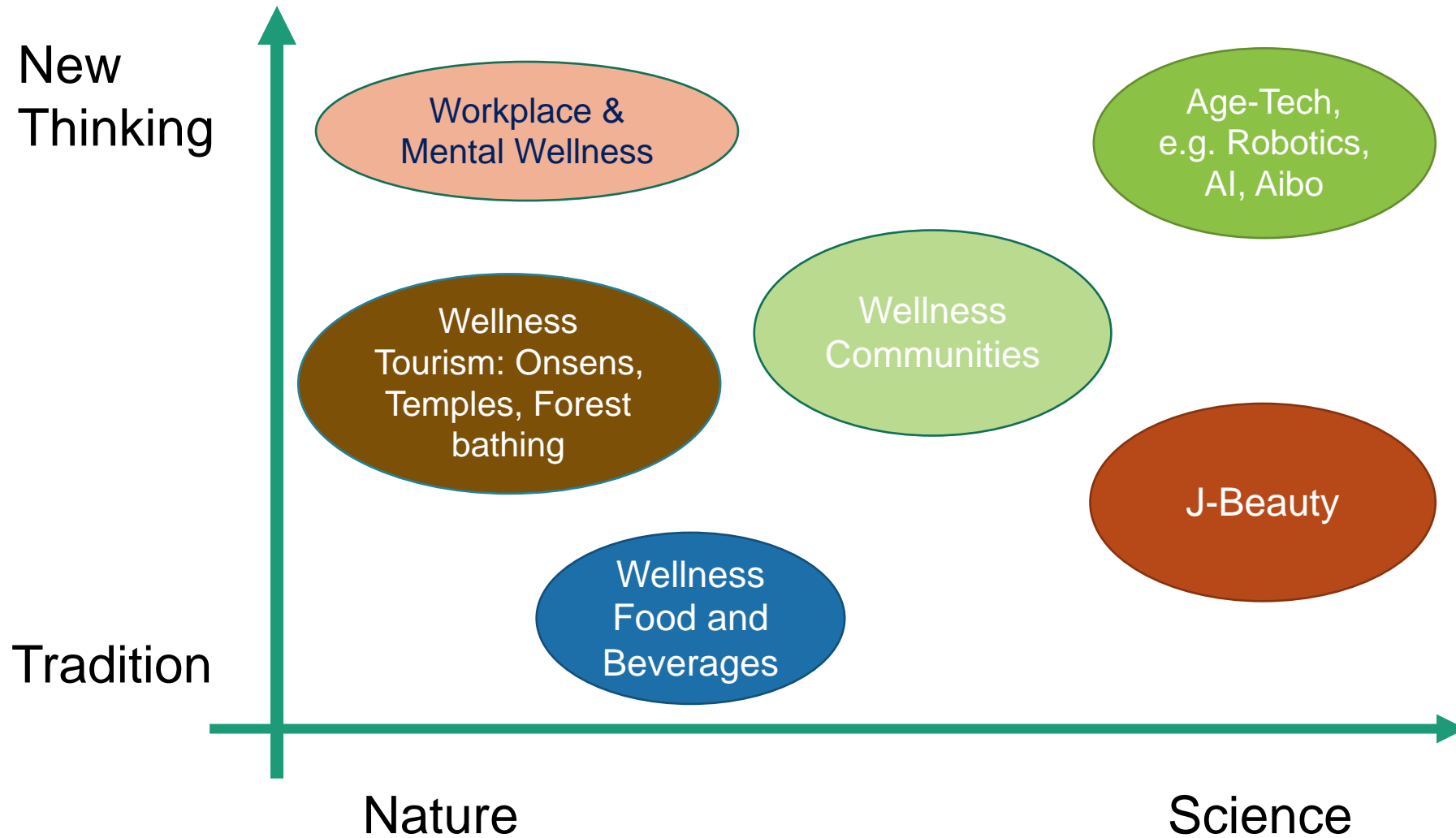
27% of people currently over 65, and by 2050, there will be 70 retirees for every 100 workers



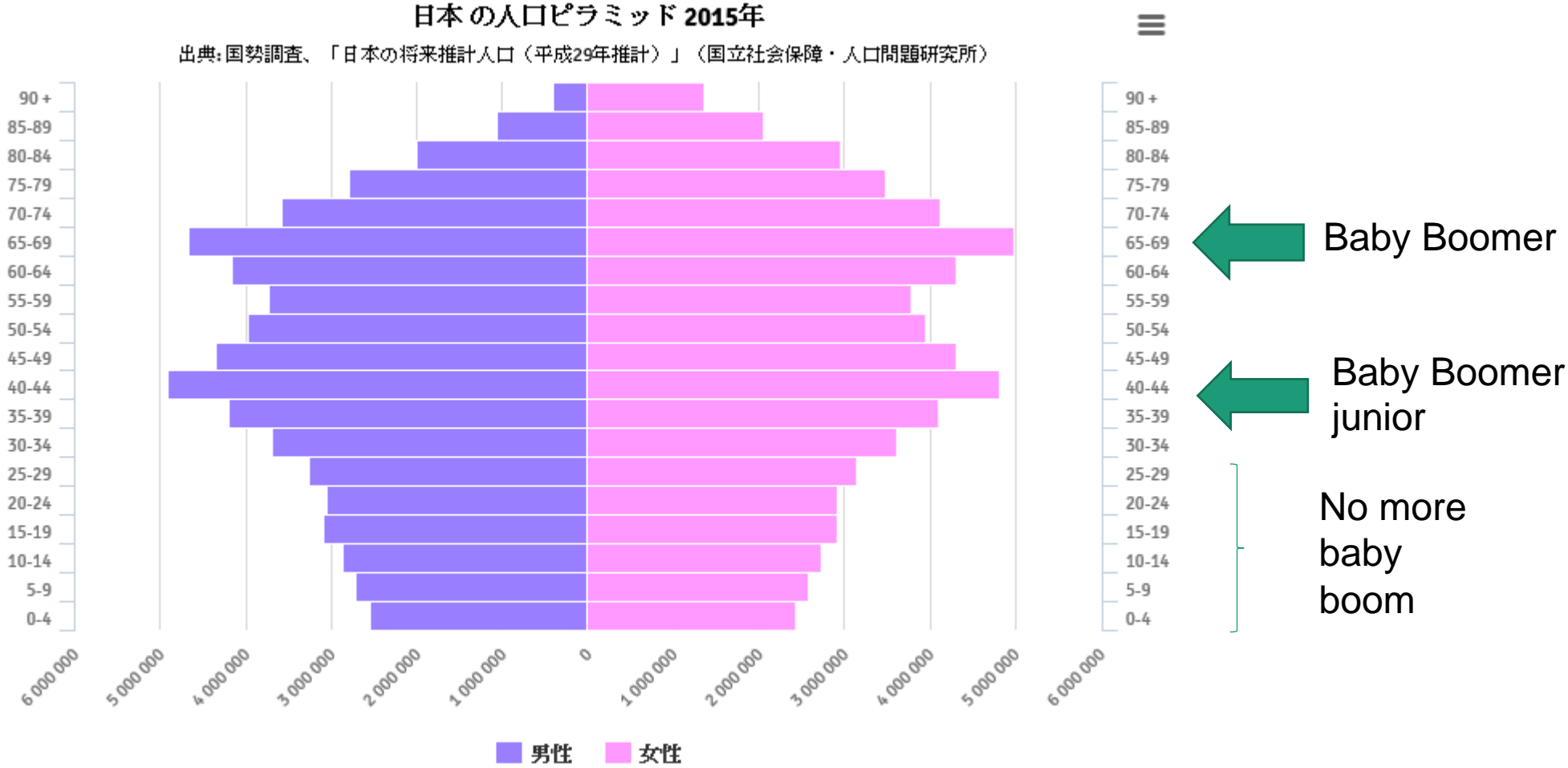


Japan: Leader in Workplace Wellness
Mental Wellness is a Work in Progress

J-Wellness: The bridge between New Thinking & Tradition, Science & Nature



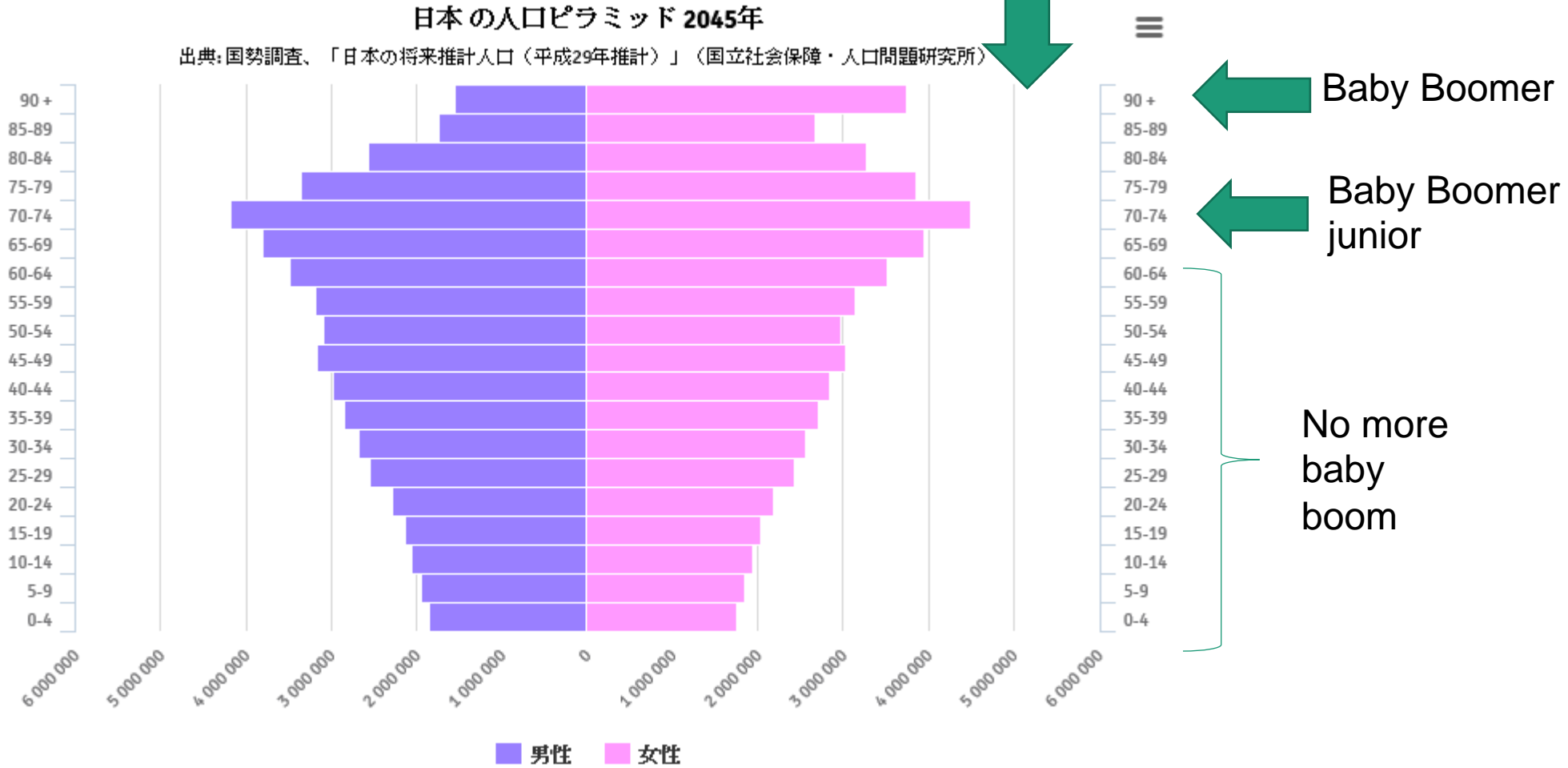
Japan Population Pyramid



Source: 国立社会保障・人口問題研究所の『日本の将来推計人口(平成29年推計)』

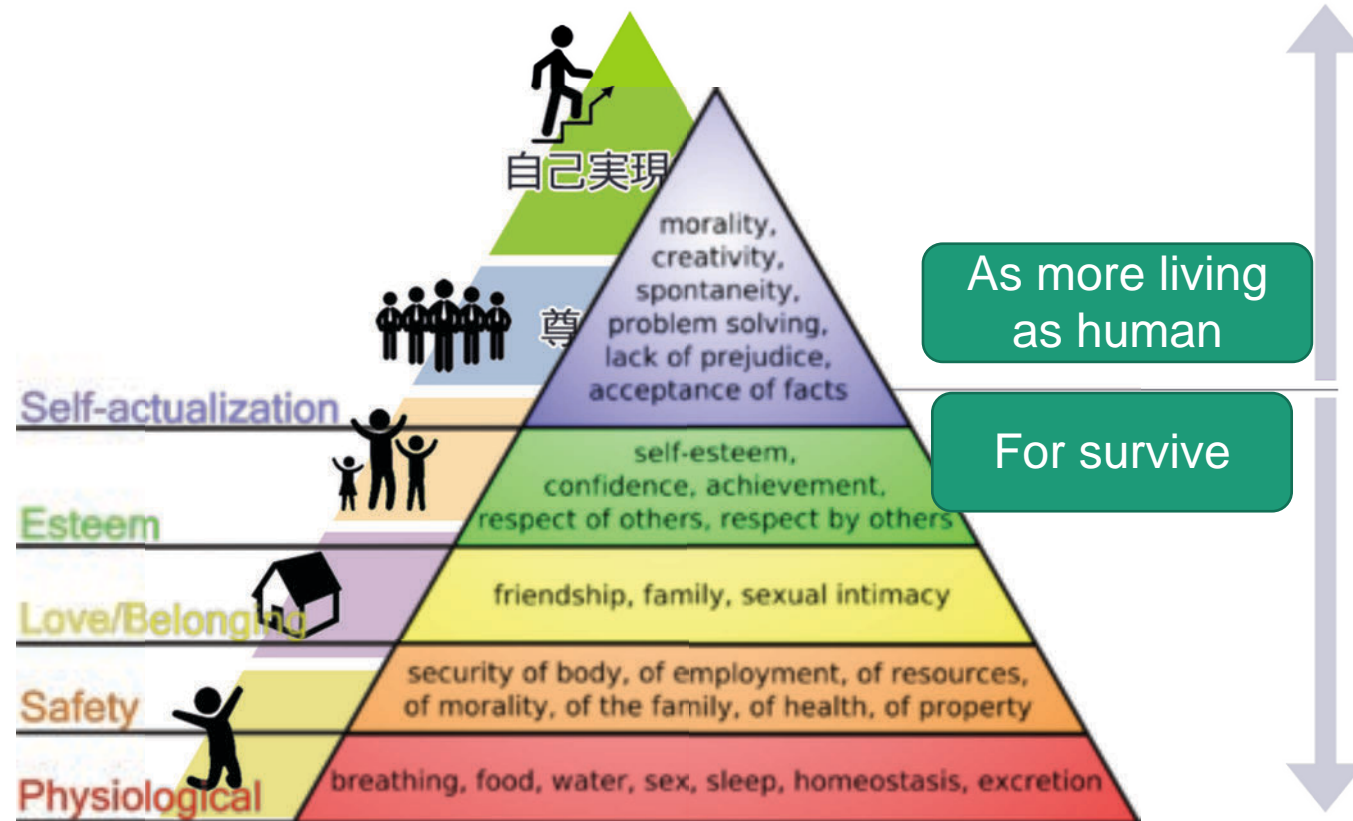
Japan Population 2045

Life Shift 100 years life in Japan especially on women



Source: 国立社会保障・人口問題研究所の『日本の将来推計人口(平成29年推計)』

Maslow's Hierarchy of Needs: Created when human life was around 60 years



Japan is embracing the 100-year life: and looking for new achievements

Our new goal is happiness

Wellbeing

Do active, exercise, making community, eat healthy food and sleep well. "Ikigai: meaning of our live" Wellbeing

Wellness

Healthy life and comfortable environment
Wellness

