Asia-Pacific Wellness Tourism Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Specialty, Niche & Experience Tourism (Hospitality & Tourism)
> **Source:** https://www.mordorintelligence.com/industry-reports/asia-pacific-wellness-tourism-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 204.18 billion
Projected Forecast (2031)	USD 204.18 billion
Growth Rate (CAGR)	8.74 %
Largest Market Region	N/A
Fastest-Growing Region	Market Trends and Insights

Market Visualizations & Infographics

```
![Major players in Asia-Pacific Wellness Tourism industry](images/chart_2.png)

![Asia Pacific Wellness Tourism Market (2025 - 2030)](images/chart_3.png)

![Asia-Pacific Wellness Tourism Market: Market Share by Service Type, 2025](images/chart_4.png)

![Asia Pacific Wellness Tourism Market: Market Share by Traveler Type, 2025](images/chart_5.png)

![Asia Pacific Wellness Tourism Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
```

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 187.78 Billion |
Market Size (2026) | USD 204.18 Billion |
Market Size (2031) | USD 310.56 Billion |
Growth Rate (2026 - 2031) | 8.74 % |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

|

Market Overview

Asia-Pacific Wellness Tourism Market Analysis by Mordor IntelligenceThe Asia-Pacific wellness tourism market size was valued at USD 187.78 billion in 2025 and estimated to grow from USD 204.18 billion in 2026 to reach USD 310.56 billion by 2031, at a CAGR of 8.74% during the forecast period (2026-2031). Government-backed integration of traditional medicine, surging disposable incomes among the region’s expanding middle class, and sustained post-pandemic prioritization of preventive health continue to energize demand for authentic wellness experiences that combine cultural heritage with measurable outcomes[1]Global Wellness Institute, “Global Wellness Economy Monitor 2024,” globalwellnessinstitute.org. . China currently underpins regional performance through a 37.28% Asia-Pacific wellness tourism market share in 2024, yet India’s 11.82% forecast CAGR points to a more geographically balanced growth trajectory during the outlook period. Secondary wellness travel, where wellness activities augment a broader holiday, remains the dominant user behavior, but primary wellness travel is registering stronger expansion as travelers allocate entire trips to transformative health retreats, thereby lifting yields for operators focused on curated long-stay programs. Supply-side fragmentation keeps competitive intensity low; the top five brands command just 25.9% of regional revenue, leaving substantial white-space for specialized retreat developers, eco-lodge owners, and purpose-built medi-wellness facilities that can scale quality capacity faster than incumbents encumbered by standardized hotel operating models.

Key Report Takeaways* By service type, spa and beauty therapies led with 19.21% of the Asia-Pacific wellness tourism market share in 2025, while digital-detox escapes are projected to grow at a 11.64% CAGR through 2031.
* By traveler type, secondary wellness travel accounted for 86.04% of the Asia-Pacific wellness tourism market size in 2025; primary wellness travel holds the highest projected CAGR at 9.83% for 2026-2031.
* By accommodation type, wellness hotels captured 31.17% of the Asia-Pacific wellness tourism market size in 2025, whereas eco-wellness lodges are forecast to advance at a 12.58% CAGR to 2031.
* By geography, China dominated with a 36.78% Asia-Pacific wellness tourism market share in 2025, while India is positioned as the fastest-growing market at 11.14% CAGR over the forecast horizon.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Asia-Pacific Wellness Tourism Market*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising middle-class disposable income & intra-regional air-connectivity boom	+2.1%	China, India, Southeast Asia core markets	Medium term (2-4 years)
Post-pandemic health consciousness accelerating preventive-care travel	+1.8%	Global, with highest impact in APAC urban centers	Short term (≤ 2 years)
Government promotion of AYUSH, TCM & J-Wellness creating demand pull	+1.5%	India, China, Japan with spillover to regional markets	Long term (≥ 4 years)
Digital nomad & "work-from-anywhere" visas extending length-of-stay	+0.9%	Thailand, Philippines, Singapore, Malaysia	Medium term (2-4 years)
Corporate off-site mental-wellness retreats tackling employee burnout	+0.7%	Urban APAC centers, particularly Japan, South Korea, Singapore	Short term (≤ 2 years)
Buy-Now-Pay-Later travel financing unlocking premium retreat affordability	+0.4%	Millennial-heavy markets across APAC	Medium term (2-4 years)
Source: Mordor Intelligence			

Competitive Landscape

Competitive Landscape

The Asia-Pacific wellness tourism market remains structurally fragmented, with the five leading operators, Accor’s Spa & Vitality portfolio, Marriott’s EDITION and Ritz-Carlton Reserve, Banyan Tree’s Wellbeing Sanctuaries, Minor Hotels’ Anantara Wellness, and IHG’s Six Senses, collectively holding a relatively small share of the region’s overall revenue. Brand share diffusion reflects the heavy presence of independent boutique retreats, physician-owned medi-wellness clinics, and community-run eco-lodges that cater to localized heritage therapies. Major chains exploit distribution scale and loyalty ecosystems to maintain visibility across multiple feeder markets, yet homegrown players frequently outperform on guest satisfaction due to deeper cultural immersion and higher therapist-to-guest ratios.

Technology integration has emerged as a decisive differentiator; Anantara’s Layan Life invests in AI-driven body-composition scanners and predictive analytics that personalize detox protocols in real time, delivering quantifiable outcome reports at checkout. Banyan Tree’s Stay for Good initiative layers ESG reporting and guest carbon calculators onto wellness packages, attracting environmentally motivated philanthropists who view travel as an impact investment. Marriott, pursuing asset-light growth, signed 109 new APAC-excluding-China deals in 2024, with 19% of the pipeline dedicated to wellness-oriented luxury formats across Jakarta, Mumbai, and Fukuoka. Chinese conglomerates such as OCT Group expand OCT Yangle hot-spring clusters, leveraging domestic DTC channels to capture pent-up local demand and feeding cross-promotional flows to overseas acquisitions in Guam and Saipan.

Investment banks highlight rising M&A momentum as private-equity firms consolidate fragmented spa chains and aging resort stock ripe for wellness repositioning. Valuation multiples favor operators with proprietary practitioner academies and data-rich patient outcomes, underlining the strategic value of human capital and clinical intellectual property. Looking ahead, convergence of insurance reimbursements, fintech-enabled installment plans, and employer-sponsored retreats could accelerate brand consolidation as capital-intensive diagnostics become table stakes, raising entry barriers for smaller players lacking medical partnerships.

Asia-Pacific Wellness Tourism Industry Leaders* Accor

* Marriott International

* Banyan Tree Holdings

* Hilton Worldwide

* Minor International

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

For this study, the Asia-Pacific wellness tourism market is defined as the total visitor spending linked to wellness-led trips and wellness add-ons taken during leisure or business travel across APAC destinations, counted in USD value.

Scope exclusions: We exclude routine local wellness spend with no overnight travel element and non-tourism healthcare spending that is not attached to a trip.

Segmentation Container

* By Service Type* Yoga & Meditation Retreats
* Spa & Beauty Therapies

* Naturopathy & Detox Packages
* Mental-Wellness Retreats
* Digital-Detox Escapes
* Spiritual Healing Journeys

* By Traveler Type* Primary Wellness Travel
* Secondary Wellness Travel

* By Accommodation Type* Yoga Retreats
* Wellness Hotels (Chain)
* Boutique Retreats
* Eco-Wellness Lodges
* Wellness Clinics with Stay

* By Geography* India
* China
* Japan
* Australia
* South Korea
* South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines)
* Rest of Asia-Pacific

Frequently Asked Questions

What is the current value of the Asia-Pacific wellness tourism market?

The Asia-Pacific wellness tourism market size is estimated at USD 204.18 billion for 2026.

How fast is the sector expected to grow through 2031?

Market revenue is projected to expand at a 8.74% CAGR, reaching USD 310.56 billion by 2031.

Which service category leads regional revenue?

Spa and beauty therapies currently command the largest 19.21% revenue share in 2025.

Which traveler type offers the highest growth potential?

Primary wellness travel is forecast to grow at a 9.83% CAGR because more visitors dedicate entire trips to transformative health programs.

Which country will witness the fastest growth?

India is projected to record the highest CAGR of 11.14% through 2031, driven by supportive AYUSH visa policies.

Why are eco-wellness lodges gaining popularity?

Travelers increasingly associate environmental stewardship with personal well-being, propelling eco-wellness lodges to a 12.58% forecast CAGR.