

Developing Indonesia's Yoga Industry for Competitive Wellness Tourism

Indonesia's Yoga
Industry

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Submitted:
FEBRUARY 2025

Budiman Mahmud Musthofa

Universitas Indonesia; Depok, Indonesia

Accepted:
MAY 2025

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ABSTRACT

The wellness tourism industry, especially yoga, is growing rapidly, with an estimated market value of \$1,974.81 billion by 2031. However, the development of this industry in Indonesia is still categorized as developing. This study aims to explore the portrait and condition of the development of the yoga industry as part of wellness tourism and identify the urgency and factors that play a role in its development. The Systematic Literature Review (SLR), which refers to the PRISMA protocol, is used to collect, analyze, and evaluate relevant documents related to the yoga industry. The analysis results show that research related to yoga and wellness tourism increased from 2015-2025, with three main clusters formed from the data analyzed. The development of the yoga industry has significant potential to improve public health and welfare and strengthen the tourism sector. The synergy the government, society, and related stakeholders need synergy to support this development.

Keywords: Development, Health, Tourism Sector, Wellness Tourism, Yoga Industry

ABSTRAK

Industri wisata kebugaran, khususnya yoga, tengah berkembang pesat, dengan estimasi nilai pasar mencapai \$1.974,81 miliar pada tahun 2031. Penelitian ini bertujuan untuk mengeksplorasi potret dan kondisi perkembangan industri yoga sebagai bagian dari wisata kebugaran dan mengidentifikasi urgensi serta faktor-faktor yang berperan dalam perkembangannya. Systematic Literature Review (SLR) yang mengacu pada protokol PRISMA. Hasil analisis menunjukkan bahwa penelitian terkait yoga dan wisata kebugaran meningkat dari tahun 2015-2025, dengan tiga klaster utama yang terbentuk dari data yang dianalisis. Perkembangan industri yoga memiliki potensi yang signifikan untuk meningkatkan kesehatan dan kesejahteraan masyarakat serta memperkuat sektor pariwisata.

Kata kunci: Pengembangan, Kesehatan, Tinjauan Literatur Sistematis, Pariwisata Kebugaran, Industri Yoga

JIMKES

Jurnal Ilmiah Manajemen
Kesatuan
Vol. 13 No. 3, 2025
pp. 1339-1348
IBI Kesatuan
ISSN 2337 – 7860
E-ISSN 2721 – 169X
DOI: 0.37641/jimkesv13i3.3186

INTRODUCTION

The tourism industry in Indonesia is vital for many sectors because it can drive sustainable growth. Purba et al. (2021) explained that the tourism sector holds an important pillar for advancing the economy in Indonesia. The wellness tourism industry is one of the industries that is predicted to continue to grow, according to data from the Grand View Research (2023), which states that the total market value in 2023 will reach \$909.82 billion and is predicted to increase to \$1,974.81 billion in 2031 or an increase of 10.37% each year. Liao et al. (2023) stated that wellness tourism can develop rapidly basically because of its advantages, which involve several aspects, namely physical, mental, social, and environmental health. Arifin et al. (2024) stated that wellness tourism is an important issue that continues to be considered and will be developed because it has much potential that can be utilized.

Wellness tourism is a diversification for many stakeholders to build health and tourism simultaneously. Árpási (2018) explains that this condition is caused by combining activities related to efforts to improve health, relieve stress, relax, and take a vacation. This condition makes many countries compete to develop the wellness tourism industry. Grand View Research (2023) provides information that the world is currently receiving signals to develop and promote the advantages of wellness tourism in its country. Indonesia is one of the countries with various types of wellness tourism; on the other hand, the Indonesian government strongly supports its development through a transformative process by arranging various activities, programs, and approaches. Kusumaningrum and Jayanti (2024) stated that the wellness tourism industry is an interesting thing to pay attention to. However, in its development, it must focus on several types of products that are in demand by many users. Maharani and Sudarningsih (2023), Newcombe (2007), and Macy et al. (2018) stated that yoga is one part of the wellness tourism industry, which for decades has always increased in popularity both domestically and abroad. Arifin et al. (2024) explained that yoga has become popular because of its ability to intervene in degenerative disease problems. This is one of the drivers of the increasing popularity of yoga in the eyes of the public.

The development of the yoga industry in Indonesia is still in the developing category because there are still other countries that can be used as benchmarks. Zeinalnezhad et al. (2011) explained that benchmarking is an important thing that needs to be done in order to obtain information related to the factors that play a role in the process and how to develop it. Torkki and Lillrank (2013) explained that in developing industries, a specific explanation needs to be related to the factors that play a role and be considered as a basis for compiling success indicators. The study aims to see the portrait and conditions of the development of the wellness tourism industry, especially yoga, in several countries. Through literature searches, it is hoped that a common thread will be found related to strategic issues that can be managed to develop the yoga industry in Indonesia. The underlying aspects of this research process include: 1) the urgency of developing yoga to encourage the development of the wellness tourism industry in various countries. Moreover, 2) factors that play a role in developing the yoga industry in various countries.

LITERATURE REVIEW

The Rise of Yoga in Global Wellness Tourism

The global wellness tourism industry, with yoga as a central component, has witnessed remarkable growth driven by increasing global awareness of holistic health. According to the Grand View Research (2023), the market was valued at \$909.82 billion in 2023 and is projected to reach \$1,974.81 billion by 2031, growing at a compound annual rate of 10.37%. This trend reflects the heightened demand for travel experiences that promote physical, mental, and spiritual well-being (Liao et al., 2023). Yoga plays a key role in this movement due to its proven benefits for reducing stress, enhancing physical fitness, and supporting mental health, which has made it increasingly popular among wellness tourists (Dillette et al., 2019; Charak et al., 2020). Countries like India have emerged as global yoga tourism hubs, capitalizing on their cultural authenticity and spiritual legacy. Bowers

and Cheer (2017) emphasize that India's appeal lies in its deep-rooted traditions, attracting Western tourists seeking transformation. Government initiatives like the International Day of Yoga and the development of ashrams and retreats have amplified India's status as a yoga destination (Manjunath, 2023). Telej and Gamble (2019) note that India's strategic marketing, showcasing both natural beauty and cultural richness, strengthens its global positioning.

Global Adaptations and Key Drivers of Yoga Tourism

Beyond India, countries have adapted yoga to suit local needs. In the U.S., yoga is widely accepted as part of mainstream health and fitness programs, focusing on stress management and emotional well-being (Lehto et al., 2006; Dillette et al., 2018). In China, government-backed health policies support the growth of yoga as part of sports and wellness tourism (Jingwei, 2023). In Nepal, yoga tourism emphasizes eco-tourism and rural development, integrating health tourism with environmental and cultural assets (Khanal & Shimizu, 2019). Several factors drive the global development of yoga tourism. Naidoo et al. (2018) identify a global shift toward preventive health, with yoga increasingly seen as a tool for holistic wellness. Scientific studies support its effectiveness in improving flexibility, mental clarity, and stress reduction (Biman et al., 2021; Charak et al., 2020). In addition, yoga's popularity has surged through social media and celebrity endorsements, framing it as a modern lifestyle trend (Bandyopadhyay & Nair, 2019; Sipayung et al., 2021). Technological innovations, such as virtual yoga sessions and digital marketing strategies like SEO, have broadened yoga's global accessibility (Verma et al., 2024; Sipayung et al., 2021). Government policies also shape the industry, with India and Nepal implementing visa facilitation and local engagement strategies post-COVID-19 (Choudhary & Qadir, 2022; Khanal & Shimizu, 2019). Nonetheless, challenges such as over-commercialization and authenticity remain. Bowers and Cheer (2017) warn that commodification may dilute yoga's spiritual value, while Patwardhan (2016) highlights gender imbalances, with only 15.8% of practitioners being male, necessitating inclusive approaches.

The State and Future of Yoga Tourism in Indonesia

Compared to global leaders like India and Thailand, Indonesia's yoga tourism industry remains in its early stages (Arifin et al., 2024). Kusumaningrum and Jayanti (2024) argue that Indonesia must focus on developing specialized wellness tourism products, including yoga, to compete internationally. While Indonesia's diverse culture and scenic beauty present significant opportunities, the country faces issues related to infrastructure, qualified instructors, and branding (Maharani & Sudarningsih, 2023). Alfiana et al. (2022) stress the importance of incorporating local wisdom to make Indonesian yoga offerings more authentic and attractive in the global market. Despite its potential, Indonesia's yoga tourism lacks comprehensive academic attention. Existing literature provides valuable global insights, but Indonesia-specific strategies—integrating local culture, government policy, and digital tools—remain underexplored. This study aims to address that gap by mapping the current state of yoga tourism in Indonesia and identifying strategic initiatives to boost its competitiveness in the global wellness tourism arena.

RESEARCH METHOD

This research focuses on the yoga industry within the broader context of wellness tourism, utilizing a Systematic Literature Review (SLR) approach to analyze and synthesize relevant academic findings. The SLR method is selected for its structured ability to identify, interpret, and evaluate existing studies in a comprehensive and accurate manner. To ensure methodological rigor, the study employs the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) protocol, which outlines essential steps such as defining eligibility criteria, selecting sources, collecting data, and extracting relevant information (Page et al., 2021). The review framework begins by formulating two central research questions: the first explores the urgency of developing

the yoga industry to support tourism advancement, while the second investigates the factors that influence its growth. These questions guide the subsequent search for literature using databases like ProQuest, Google Scholar, Crossref, and Scopus. Keyword combinations such as yoga, wellness tourism, development, industry, and country are used to retrieve relevant documents, initially resulting in 1,220 articles. After eliminating 687 duplicates, a refined set of 533 articles is further evaluated for relevance, with 488 excluded due to insufficient alignment with the research focus. An additional ten high-quality articles from Google Scholar are added, yielding a total of 55 articles for analysis. These selected documents undergo a thorough full-text review and codification, where themes such as country-specific contexts, development drivers, strategic approaches, and supporting policies are examined using tools like Publish or Perish 8, POE, and VOS viewer. The final reporting stage synthesizes these findings through descriptive analysis, offering insights into how the yoga industry contributes to wellness tourism and outlining strategic directions for its development. This structured and evidence-based approach ensures that the conclusions drawn are comprehensive, credible, and actionable.

RESULTS

The search results using Publish or Perish software show that between 2015 and 2025, research related to the development of yoga and fitness tourism tends to increase. This condition shows that this theme is increasingly popular and in-depth. The concept related to the research theme was deepened with 55 data points, which were then mapped using Vos Viewer. Three cluster groups related to the yoga industry were found. The findings are as in Figure 2.

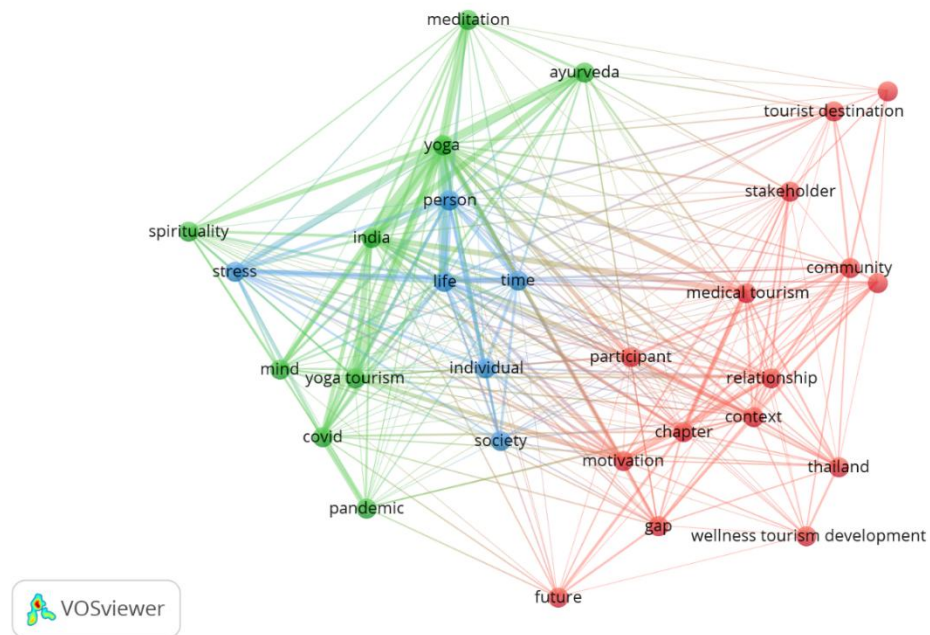


Figure 2. Mapping Results related to Network Visualization Display Mode Clusters

Figure 2 provides information that cluster 1, represented by the color red, consists of several items: tourist destinations, stakeholders, communities, medical tourism, relationships, participants, context, chapters, motivation, Thailand, gaps, wellness tourism development, and the future. Cluster 2, represented by green, consists of meditation, ayurveda, yoga, India, spirituality, mind, yoga tourism, COVID, and pandemic. Cluster 3 is related to a person, stress, life, time, individual, and society. Ultimately, network visualization aims to present network data in an easy-to-understand graphical format, thus facilitating the analysis of its structure and relationships. Mapping is used as a basis for creating questions related to research.

The urgency of developing the yoga industry in tourism development is an important thing that must be considered in the development of the yoga industry. In this case, it is hoped that a basis can be found for a country to pay attention to the development of the yoga industry. In general, the development of an industry is due to the potential for development and has a large multiplier effect (Payapo et al., 2023). Bowers and Cheers (2018) explained that the development of the yoga industry has an urgency to increase the number of tourists visiting India by including added value, namely healthy, calm, and happy; in addition, this development can encourage the growth of the herbal medicine industry (Ayurveda) in the country.

Table 1. Urgency of the State to Develop the Yoga Industry

Country	Urgency	Information
India	Increase tourist visits	Developing the yoga industry to restore the economy post-pandemic and support the herbal medicine industry.
American	Improving psychological well-being	The yoga industry as a tool to relieve stress and achieve mental harmony balance.
English	Improvement of healthy lifestyle	The development of yoga as a response to increasing awareness of maintaining health.
China	Encourage economic development and utilization of cultural resources	The yoga industry as a pathway for the development of traditional health and related industries.
Nepal	Promoting health tourism	The development of the yoga industry is accompanied by economic motivation and synergy with other sectors.
Türkiye	Cultural exchange and health impacts	The combination of yoga and cultural tourism as an authentic value needed in industrial development.
Italy	Use of local natural and cultural resources	The development of yoga that utilizes natural resources by integrating local culture.

Table 2. Driving Factors for the Development of the Yoga Industry

Country	Driving Factors	Information
Indonesia	Individual awareness to maintain health.	Increased health promotion related to disease prevention and self-medication.
India	Involving tourism elements as the main attraction.	The Indian government has created many yoga activity centers such as ashrams and retreats to attract tourists.
Brazil	The emergence of organizations related to the yoga industry.	The development of the yoga industry continues to grow with the promotion of health and organized activities.
American	Increasing public awareness of the importance of mental and physical health.	Yoga is considered as a tool to achieve psychological well-being and relieve stress.
China	Rising domestic market demand for diversified health and sports tourism.	The government is focusing on developing the yoga industry as a pathway to promote a healthy lifestyle.
Nepal	Economic motivations for promoting healthy tourism.	Yoga development involves the environment as part of a health tourism strategy.

Table 1 shows that different countries have different urgencies in developing the yoga industry, according to their respective social, economic, and cultural conditions. India, as the country of origin of yoga, is utilizing its cultural heritage to increase tourist visits, especially post-pandemic, and supporting the herbal medicine industry as part of its economic recovery strategy. In the United States, yoga is developing as a tool to improve people's psychological well-being, especially in dealing with stress and achieving mental balance. The United Kingdom is developing yoga as part of a healthy lifestyle, as people's awareness of the importance of maintaining preventive health increases. Meanwhile, China is making yoga part of its economic development and cultural utilization, by integrating it into the health and traditional medicine industry. Nepal is promoting the yoga industry through the health tourism sector, with the aim of driving economic growth and synergy between sectors. In Turkey, yoga is being developed in the context of cultural exchange and health benefits, especially through the combination of yoga and cultural

tourism that offers authentic value. Italy also sees great potential in the yoga industry by utilizing local natural and cultural resources, creating unique experiences that support the tourism sector and the creative economy. Overall, these data show that yoga has become a strategic cross-sectoral instrument in various countries.

Table 2 shows that the development of the yoga industry in various countries is driven by various factors, depending on the social, cultural, and policy contexts of each country. In Indonesia, the growth of the yoga industry is mainly driven by the increasing awareness of individuals to maintain health. This is in line with health promotion that emphasizes disease prevention and self-medication. Meanwhile, India utilizes the tourism element as the main attraction in the development of yoga. The Indian government is actively building yoga activity centers such as ashrams and retreats to attract local and foreign tourists. In Brazil, the emergence of various organizations that support yoga activities has also driven the growth of this industry, along with the increasing health promotion and organized activities. The United States shows an increase in public awareness of the importance of mental and physical health, so that yoga is seen to achieve psychological well-being and overcome stress. China, on the other hand, is experiencing an increase in domestic market demand for health and sports tourism. The Chinese government has made the yoga industry part of its healthy lifestyle promotion strategy. Nepal sees the economic potential of health tourism, so that yoga development is carried out with an environmental and spiritual approach to attract tourists. Overall, the yoga industry is growing rapidly because it is supported by a combination of public awareness, tourism strategies, government roles, and the economic potential inherent in a healthy lifestyle.

DISCUSSION

The global wellness tourism industry has experienced significant growth, with yoga emerging as a key pillar due to its holistic benefits. In India, yoga supports post-pandemic recovery by revitalizing health tourism and promoting healthy lifestyles, although challenges include enhancing community skills and awareness (Choudhary & Qadir, 2022). In the U.S., yoga contributes to psychological well-being and life balance, impacting both lifestyle and economy through improved health. In the UK, yoga is associated with healthy living and education, while in China, it serves as a driver of local economic development (Heung & Kucukusta, 2012; Ali-Knight & Ensor, 2017). Nepal promotes yoga for eco-tourism, and Turkey emphasizes yoga's role in cultural exchange and mental health (Ferreira-Vorkapic et al., 2015; Öznalbant & Alvarez, 2020).

The wellness sector is projected to become one of the fastest-growing tourism segments (Csirmaz & Petó, 2015), driven by the post-crisis demand for holistic relaxation (Silva & Mayer, 2021). The rising interest in yoga aligns with the shifting landscape of spirituality in the Western world, although commercialization raises intellectual property rights concerns. In Niue, yoga supports sustainable, post-COVID tourism. Wellness tourism is expected to grow from USD 436 billion in 2020 to USD 1 trillion by 2025. Yoga's popularity is fueled by its health benefits and digitalization (Hekmat et al., 2021; Clerici et al., 2023; Verma et al., 2024). Tourists increasingly seek authentic experiences, and digitalization—such as spa SEO and tele-yoga—broadens access (Thomson et al., 2015; Sipayung et al., 2021). Countries like India, Thailand, and Indonesia are using yoga to diversify their economies and attract new market segments (Telej & Gamble, 2019). Local economic opportunities increase through tourist spending and business development (Kunwar & Sharma, 2020; Suban, 2023), although challenges such as commercialization, gender dominance, and lack of regulation remain (Yu & Lee, 2020).

The yoga industry is valued at US\$3.4 trillion—three times the size of the pharmaceutical industry—due to modern consumers' focus on physical, mental, and spiritual balance (Mora et al., 2018). In Brazil, affiliated organizations and health promotion initiatives expanded the market (Siegel & Barros, 2009), while India integrates tourism, culture, and government support to serve high-end wellness travelers (Poongodi, 2020; Mathew et al., 2021). Yoga growth is driven by certified schools, unique styles, expert instructors, healthy lifestyle promotion, female focus, and high-stress jobs

(Deshmukh et al., 2021; Jingwei, 2023; Pansantie & Subanjui, 2024). Thailand markets yoga as an affordable wellness option, Italy combines local culture and nature, and the Netherlands responds to lifestyle trends (Smith & Puczko, 2009). In the U.S., yoga expands through market potential, social transformation, and sustainability.

Social media, scientific research, and celebrity influence have driven yoga's global popularity (Bandyopadhyay & Nair, 2019). Cultural adaptation and digital technologies have expanded the market. Policy support, International Yoga Day promotion, and local development models are foundational in Indonesia (Manjunath, 2023; Arifin et al., 2024). Sustainability trends and the demand for authenticity reinforce the appeal of eco-friendly retreats, offering a strategic roadmap for sustainable yoga tourism growth globally and nationally (Bakar et al., 2020; McCartney, 2021; Gumilang et al., 2024; Prihatini et al., 2024; Rachma et al., 2024).

CONCLUSION

Global wellness tourism, with yoga as a key component, shows strong growth potential in the years ahead. Driven by increasing awareness of holistic health and wellness, changing lifestyles, and the impact of the COVID-19 pandemic, yoga tourism offers a unique experience that integrates physical, mental, and spiritual practices. While challenges related to authenticity, accessibility, and regulation remain, opportunities for product diversification, cross-sector collaboration, and technology integration provide avenues for continued growth in the future. For destination countries and industry players, yoga tourism can diversify tourism offerings and attract new market segments while empowering local economies and promoting sustainable practices.

The development of the yoga industry is driven by a combination of interrelated factors, ranging from changing attitudes towards health and wellness, the influence of media and popular culture, government policy support, and consumer demand for authentic experiences. Yoga's ability to adapt to different cultural contexts and the integration of modern technology have expanded its reach globally. Despite challenges such as commercialization and authenticity issues, the yoga industry continues to grow and adapt, particularly in the broader context of wellness tourism. With the ongoing trend in health awareness and interest in holistic practices, the yoga industry will likely continue to grow and expand in the coming years, offering significant opportunities for various stakeholders, from practitioners and instructors to tourism destinations and related service providers.

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