4WR: WELLNESS

for Whom, Where and What?

Spa Mantra brings the best from the Wellness Tourism 2020 research report

Written by **Camille Hoheb** and **Laszlo Puczko**, in collaboration with the Hungarian National Tourism Plc., the 4WR report is the collection of information from 140 visionaries representing stakeholders from wellness, tourism, spa and healthcare industries in over 50 countries worldwide. Wellness tourism is one of the fastest growing forms of international and domestic tourism. This trend is not expected to change in the coming 5-10 years. There is one major risk, however: the globalization of standardized and uniform products and services. Key findings of the 4WR Full Report help developers, managers and policy makers and others vested in wellness tourism build on or develop individual competitive advantages and as importantly, avoid costly common mistakes. The report exposes the biggest opportunities over the next 10 years, to better define new product development strategies.

Wellness Tourism Worldwide subscribes to the notion that wellness is more than a spa or a physical orientation (e.g. fitness). WTW is based on the domains of wellness and quality of life indicators. This approach addresses human health in a comprehensive manner and assumes that individuals will actively participate in protecting their health and in preventing diseases.

The wellness industry encompasses everything from spa, food and nutrition complementary and alternative medicine, to active-aging, and fitness, to workplace wellness, medical and wellness tourism. With regards to tourism, spa and wellness tourism are often considered synonymous and the same can be said of medical and healt tourism. Yet all four have unique and different meanings and are manifested in various ways around the world.

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Travel for health

Travel can make us happier three ways:

1) with the anticipation and planning of the trip

2) enjoying the vacation

3) relishing the memories that often last a lifetime.

Tourism can enhance our well-being and quality of life, especially if we do it regularly enough, and we may even experience moments of joy. Research studies suggest that going on trips can affect meaningful change, increase work productivity and as importantly, improve health by enhancing sleep and remarkably, decreased the incident of heart disease. These benefits can be enhanced significantly if we engage in health or wellness tourism specifically. That is to say, we travel with the explicit aim or principle motivation of improving our physical and mental condition. This can include improving emotional well-being, such as stress reduction and calming the mind, as well as healing or rejuvenating the body. By 2000, health motivated travel became very popular and we could observe the proliferation of approaches and services and many countries, destination and operators (re) entering the health tourism scene. Wellness Tourism Worldwide has mapped out the recent situation as well as the expected changes in the coming 10 years. We developed a Global Health Tourism Service Grid in which we introduce the inter- and intra-relationships of the key services and approaches in the spectrum Wellness Tourism Worldwide that extends between medical and wellness services. The Global Health Tourism Service Grid aims at travel ranges from travelling for summarizing the most important types of services invasive treatments (operations) and assets.

4WR: Wellness for Whom, Where and What?

What? - Current Assets (2011)

One of the key objectives of 4WR was the recognition of assets available for wellness tourism. This is key information since the wide range of available assets can serve as one of the foundations for future developments and is essential to product diversification. 4WR found that:

Africa:

In Africa, the natural environment and traditional spirituality received relatively high importance as assets for tourism.

Asia:

In South-East Asia, spirituality achieved the highest importance (the highest absolute rating among all the regions, too), while medical treatments and services as well as alternative treatments were also important. In the Far East, spirituality and complementary and alternative methods were rated as important assets.

Australia, New Zealand and the South-Pacific:

The natural environment and traditional and alternative treatments are important assets, whereas medical services/treatments have the lowest ratings.

Europe:

Nature and the environment are important in every region of Europe, particularly in Southern Europe. Natural healing assets are significant in Western and Central-Eastern Europe. Both non-invasive medical treatments (e.g. rehabilitation) and surgical services are important in every sub-region (except Southern Europe).

Middle-East:

Natural healing as well as traditional services seem to be important, as are medical services.

The Americas:

In North America both invasive and non-invasive medical services are considered to be the most important assets. Alternative treatments and the natural environment also enjoyed high ratings, and spiritual treatments appeared to be more important than in Europe. In Central and South America, the natural environment, the traditional and complementary treatments were important, and medical assets got low ratings in both regions (those results highlight the significant differences in terms of the availability of medical services for tourism purposes and for local needs).

The regional analysis of 4WR data concludes that somewhat surprisingly regions do not differ greatly in terms of available assets that can be used in wellness tourism. This means that every region has wide range of opportunities for wellness tourism development.

Where – Regional hotspots 2020!

4WR also focuses on the future state of wellness tourism and projects popular


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products and services by or in 2020, categorized by region. Comparing current data with future trends, the supply of wellness tourism services will change significantly in the coming 10 years. According to 4WR traditional, lifestyle defining approaches (e.g. yoga) will become widely accepted in wellness tourism services in North America and Northern Europe.

Wellness hotels and resort spas are already are and forecasted to remain to be the most popular wellness tourism product in several important continents and regions by 2020 including Africa, South America, Central America, Australia and New Zealand. Spirituality remains dominant in Asia. In Central and Eastern Europe, therapeutic services and treatments are mainly based on the availability of natural assets (e.g. thermal waters) and will stay/or become the most important.

Products & Services in Most Important Region 2020 Therapeutic Services Spiritual & Holistic Services Central-, Eastern Europe Far East, South East Asia Africa, Central and South America, Middle East, Australia, New Zealand & South Pacific Northern, Southern and Western Europe, North America

Products that will be available globally and Wellness Hotels & will lose their differentiating qualities by Resort Spas 2020 include beauty treatments, massage of any kind, and sauna of any kind, day-spas, and some spiritual practices (e.g. yoga or Lifestyle-based Services meditation).

Summarizing the key trends we can say that:

Africa will show an increase leisure and recreational segment, based on wellness products. In Australia, New Zealand and the South-Pacific leisure and recreational spas, as well as wellness hotels and spas seem to be the most important in 2020, while the new lifestyle based services (e.g. combination of physical fitness, nutrition and will gain ground.

Products & Services in 2020	Most Important Region
Therapeutic Services	Central-, Eastern Europe
Spiritual & Holistic Services	Far East, South East Asia
Wellness Hotels & Resort Spas	Africa, Central and South America, Middle East, Australia, New Zealand & South Pacific
Lifestyle-based Services	Northern, Southern and Western Europe, North America

In Asia and the Middle East:

In Far East holistic and spiritual approaches/services will still be the most important services, with a strong wellness base. South-East Asia will still be the main centre for holistic and spiritual tourism. In the Middle East wellness as well as medical tourism will determine the market.

In the Americas:

South America and Central America remain to be strong in wellness tourism, as well as in leisure and recreational spas. In North America, wellness and life-style based services will gain importance, based on leisure and recreational spas, and wellness hotels.

In Europe:

Southern Europe seems to be the most dominant in leisure and recreational spas (with the highest rating in the world), but wellness hotels and spas will dominate the market. In Central and Eastern Europe, therapeutic medical services still dominate the market, but wellness and lifestyle-based services will be important. The Western European health tourism market will be dominated by wellness hotels, but leisure and recreational spas remain to stay popular. Northern Europe will be the most important hub for wellness and lifestyle-based services, with leisure and recreational spas.

For Whom: Consumer Preferences

Four segments chosen for preference analysis include men, singles, GenY and families. Wellness tourism preferences were analyzed against 10 tourism products (i.e. leisure and recreational facilities, therapeutic services, medical services, wellness hotels/spa resorts, wellness/lifestyle based services, holistic services, spiritual services, adventure and eco facilities and spas, and wellness & spa cruises). Certainly, there are many other segments in wellness tourism, but these four were selected (from the many) as not yet considered to their full potential and needing more attention. Regarding segment-based analysis the following results can be seen:

Singles will prefer wellness and lifestyle-based services as well as leisure and recreational facilities and spas.

Families will show a continued interest in leisure and recreational services, but wellness hotels and spas will also be popular.

Generation Y (young people) will show growing demand for adventure and eco facilities and spas.

The popularity of wellness and lifestyle based services, as well as adventure facilities and spas will grow among men.

Who Should Pay?

Country practices and approaches to paying for wellness-oriented travel differ oriented greatly. According to the results of 4WR: Full Report, private health insurance is expected to play a more important role in providing policies that cover wellness travel.

Interestingly, respondents participating in the 4WR survey revealed that in the field of medical tourism, the state


The Vatican City attracts millions of travelers every year for religious/ spiritual reasons

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should be playing a more significant role. There is a significant lack of information about how either private or state bodies c can or should get involved in the financing of wellness tourism (e.g. in the form of holiday vouchers in Europe Europe).

Considering the financing of the health tourism industry, the most important player is the state health insurance in the area of medical tourism, and private health insurance has a dominant role in the wellness sector.

Support by companies seems to be relevant in medical tourism; however there is a lack of information in this field, as well as in the area of holiday vouchers.

Conclusions

Wellness tourism is one of the fastest growing forms of international and domestic tourism and is in step with consumer and stakeholder interest in the burgeoning wellness industry. This trend is not expected to 'Spas are an important part change in the coming 5-10 years. There is one major risk, of wellness tourism, but however: the globalization of standardized and uniform wellness is about much more products and services, which may undermine uniqueness and that just spas' (Global Spa competitiveness. Key findings of the 4WR Full Report help Summit, 2011). developers, managers and policy makers and others vested in wellness tourism build on or develop individual competitive advantages and as importantly, avoid costly common mistakes.

1) Wellness goes beyond relaxation and is a key element of lifestyle, which is a significant opportunity for the travel and tourism industry, since people following a wellness lifestyle will look for similar services when they

are travelling. Wellness tourism is more than spa tourism and includes healthy cuisine, specific fitness or body-mind-spirit regimes, active-ageing or longevity programmes, learning, adventure, spiritual enlightenment, personal growth and has the ability to enhance lives.

2) The industry appears to be dominated by wellness destinations and hotel spas however other attractions and facilities are becoming more popular with consumers (e.g. wellness retreats, outdoor recreational activities, lifestyle centres, thermal treatment centres, etc).

3) There will be a proliferation of new, cross-over and fusion services and products which will support the development of wellness tourism in countries and regions that are not yet on the global map of wellness tourism. These need to position themselves in a distinctive way so as not to 'disappear' in a competitive environment. Unique and signature products and services need to be developed.

4) Spirituality remains important in countries where there is a strong spiritual tradition (e.g. Asia). However, the growing interest in non-religious spiritual practices in increasingly secular societies (e.g. Europe) means that such products and services need to become more widely available.

5) Consumers are becoming more attuned to the importance and value of green, eco, sustainable and organic practices and products. These should become more of a norm than an exception in wellness facilities, and the products and services should merit the 'label'.

6) A health focused region has the ability to provide enough variety of services to meet the needs of multiple target segments. One facility cannot be all things to all people.

7) There is significant potential in targeting the growth segments identified in this report, namely men, singles, families and youth (Gen Y). Men have different needs and expectations from women. Single people may feel uncomfortable surrounded by families and need tailor-made programmes. Young people have few physical health problems compared to the elderly. Parents with children need relaxation but can rarely achieve this.

8) Evidence-based wellness is becoming more important, i.e. consumers need to know that the treatments or rituals that they are receiving have been adequately researched and are safe and beneficial. This could include healing waters, muds, cosmetics, nutrition, etc. Similarly, wellness practices and practitioners should be regulated properly.

9) Wellness tourism tends to be fairly exclusive, especially when it is based on wellness hotels and spas. In the future, there is likely to be a democratisation of wellness (especially if young people are being targeted), for example, budget spas, basic retreats, nature-based activities.

10) Wellness tourism is likely to be seen as contributing to long-term well-being and quality of life, especially if there is a focus on the whole person and their entire lifespan in the form of active ageing and longevity.

11) Travel often affords the opportunity to learn about culture, history and other ways of life which contribute to the overall understanding of human nature and ones place in the world, thus corresponding to intellectual and social well-being.

Key Findings/ Recommendations for Planning

1) There is a very likely risk that the supply of wellness tourism products and services becomes too standardised. However, 4WR revealed that most regions have a number of unique assets which can and should be developed for wellness tourism. This will help to create unique selling propositions, distinctive brands and competitive destinations.

2) Several ubiquitous wellness services (e.g. saunas, massage) may lose their differentiating power and become entry-level services without which no wellness provider can (or should) operate. However, they are not enough to guarantee an appealing attraction and other newer or unusual services should be offered in parallel (e.g. rituals, traditions).

3) Operators also need to consider the significance of alternative and complementary medical treatments, especially those which enhance mental and social well-being as well as physical health.

4) Natural assets, as the most critical component to wellness tourism product development should be utilized in a sustainable manner, protected by legal arrangements and supported by private and public enterprises.

5) Natural healing assets (e.g. healing waters) will (re)gain popularity as evidenced by the growing interest in CAM, Ayurveda, Traditional Chinese Medicine and other non invasive approaches to healing and wellness.

6) While not discussed in this report, there is an opportunity to better serve and create specialized products and programs for the aging, for those with chronic conditions and /or disability.

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