

Health Tourism Trends: Back to the Future

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“Wellness is a journey not a destination”

Structure of my Talk: Health and Wellness Tourism Development

- A global overview of past and present developments in health and wellness tourism
- Factors influencing health and wellness tourism demand
- Typologies of health and wellness tourism
- Typical markets for different health and wellness products
- Summary of new products and future trends



Health

‘Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity’

(WHO, 1948)

‘The extent to which an individual or a group is able to realize aspirations and satisfy needs, and to change or cope with the environment. Health is a resource for everyday life, not the objective of living; it is a positive concept, emphasizing social and personal resources as well as physical capabilities’

(WHO, 1984)



Wellness



‘A special state of health comprising an overall sense of well-being which sees ‘Man’ as consisting of body, spirit and mind and being dependent on his environment’ (Dunn, 1959)

„A way of life oriented toward optimal health and well-being in which the body, mind, and spirit are integrated by the individual to live more fully within the human and natural community”

(Myers, Sweeney & Witmer, 2000)

- German concepts of ‘kur’, ‘medical wellness’ and ‘selfness’
- British not very familiar with the term ‘wellness’
- ‘Wellness’ often synonymous with ‘medical’ in CEE
- No word for wellness in some languages (e.g. Hebrew = ‘health’; Finnish = ‘wellbeing’; Slovenian = ‘well-feeling’)
- Icelandic??

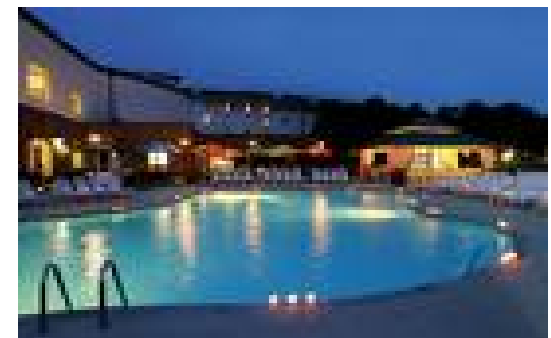
Health & Wellness in Europe: Historical

- Large numbers of thermal & mineral springs & sea coasts
- European health and wellness model based around the four elements: water, fire, earth and air
- Romans built very sophisticated baths all over Europe
- Many of Europe's historic spa towns built around healing springs between 14th & 16th Centuries
- 18th Century development of sea water facilities
- Numerous mountain climatic resorts by 19th Century
- 20th Century: spa resorts in stagnation



Health & Wellness in Europe: Contemporary

- 1,200 spas and health resorts (ESPA, 2007)
- Many spas declined (e.g. UK) **BUT**
- Saturation of industry in some countries (e.g. Germany, Austria)
- Thalassotherapy still popular and growing (e.g. in France, Greece)
- Prolific growth of wellness hotels
- Popularity of holistic tourism (e.g. in the UK, Netherlands, Germany)
- Regeneration of medical spas in CEE
- Caves and salt mines (e.g. Poland)
- Nordic Wellbeing focus: design, food, gardens & herbs, outdoor life, relaxation
- Lake wellness in Finland
- Sauna culture
- Hydrotherapy in Iceland
- Cryotherapy (extreme cold)



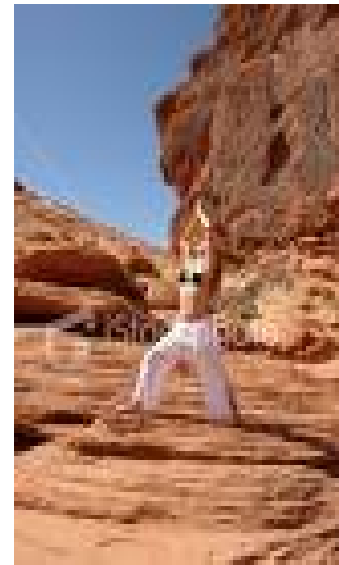
Health & Wellness in the Middle East & North Africa: Historical

- Arabian medicine influenced by Greeks and Romans:
 - Based on 4 humours
 - Based on seasons
 - Tibb – based on lifestyle
- Egyptians & Babylonians used bathing to heal the spirit & treat the body
- Visits to Dead Sea (300BC)
- Arabian Hammams played major role in Ottoman culture (600AD)
- Common practice of Jewish ritual bathing



Health & Wellness in the Middle East & North Africa: Contemporary

- Thalassotherapy in hotels in UAE, Tunisia, Morocco, Egypt
- Dead Sea (Israel, Jordan)
- Medical tourism (e.g. Dubai, Iran, Jordan)
- Desert yoga
- Spiritual festivals (e.g. in Israel)



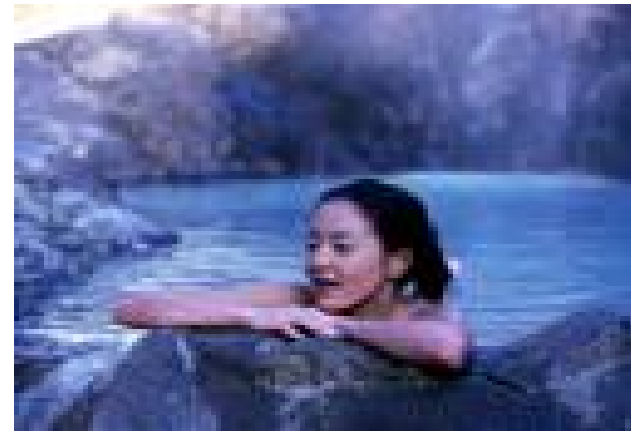
Health & Wellness in Asia-Pacific: Historic

- Holistic approach (what does this mean?)
- Rooted in tradition & spirituality
- Indian Ayurveda pre-dates most other systems of wellness
- Links with religion & pilgrimage
- Traditional Chinese Medicine (TCM)
- Feng Shui, Tai Chi, Qi Gong
- Thai massage
- Japanese onsen
- Aboriginal peoples & hot springs in Australia, New Zealand,



Health & Wellness in Asia-Pacific: Contemporary

- Luxury spa hotels (e.g. Bali, Maldives, Thailand, Vietnam)
- Continuing popularity of Japanese onsen
- Globalisation of Ayurveda, Thai massage & Chinese medicine
- Medical tourism (e.g. China, Singapore, India)
- Yoga, meditation & ashram tourism in India
- Spiritual festivals (e.g. Malaysia, India)



Health & Wellness in Africa: Historical

- Tribal & herbal medicines (witch doctors & medicine men)
- Bushmen – drumming & trance dance
- Masai massage
- Hot springs & cruises in South Africa
- C19th/20th hill stations & spas in the colonies:
 - Escape from the heat
 - Treatment for tropical diseases



Health & Wellness in Africa: Contemporary

- Luxury spas (e.g. Seychelles, Mauritius)
- Traditional spas (e.g. South Africa)
- Former colonial hill station retreats (e.g. Kenya, Uganda)
- African Bush spa
- Vinotherapy (e.g. South Africa)
- Medical tourism (e.g. South Africa, Kenya)



Health & Wellness in the Americas: Historical

- Ancient civilisations (e.g. Mayans, Aztecs, Incas)
- Native American Indian traditions
- 1806 coming together of indigenous traditions & modern spa culture in US's first European-style spa in Saratoga
- Development of day spas in early C20th
- South American focus on hot springs & volcanic thermal waterfalls & 'baños'
- Hawaiian Lomi-Lomi massage (now world famous)



Health & Wellness in the Americas: Contemporary

- Focus on pampering day spas in North America
- Canadian developments in occupational wellness
- Therapeutic recreation common in USA & Canada
- Caribbean focus on spa & wellness hotels
- Cosmetic surgery common in Central/South America
- Adventure spas growing in South America
- Ecospas in Central America



Health and Wellness in Australasia & the South Pacific: Historical

- Indigenous peoples in the Asia-Pacific region (including Australian Aborigines and New Zealand Maori) have always used traditional herbal remedies, massages, & deep spiritual beliefs in holistic ways to preserve good health & enhance well-being.
- New Zealand has numerous hot springs in its vicinity because of its volcanic landscape
- Maori built villages around springs & later (1830s) helped British to develop tourism



Health and Wellness in Australasia & the South Pacific: Contemporary

- Australia has over 500 day spas, destination spas & resort spas (Intelligent Spas, 2006)
- Development of ecolodge spas with indigenous Aborigines
- Holistic retreats near Byron Bay
- Spas based on natural hot springs in New Zealand
- Combination of geothermal, cultural & health experiences
- Development of spa & wellness hotels in South Pacific (e.g. for weddings & honeymoons)



Push and Pull Factors in Health and Wellness Tourism




PUSH

- Escape from everyday life, work & stress
- Breakdown of community & social support networks
- Loss of traditional religion
- Need to develop or improve self
- The desire to downsize, simplify or slow down life
- Influence of media & celebrities

PULL

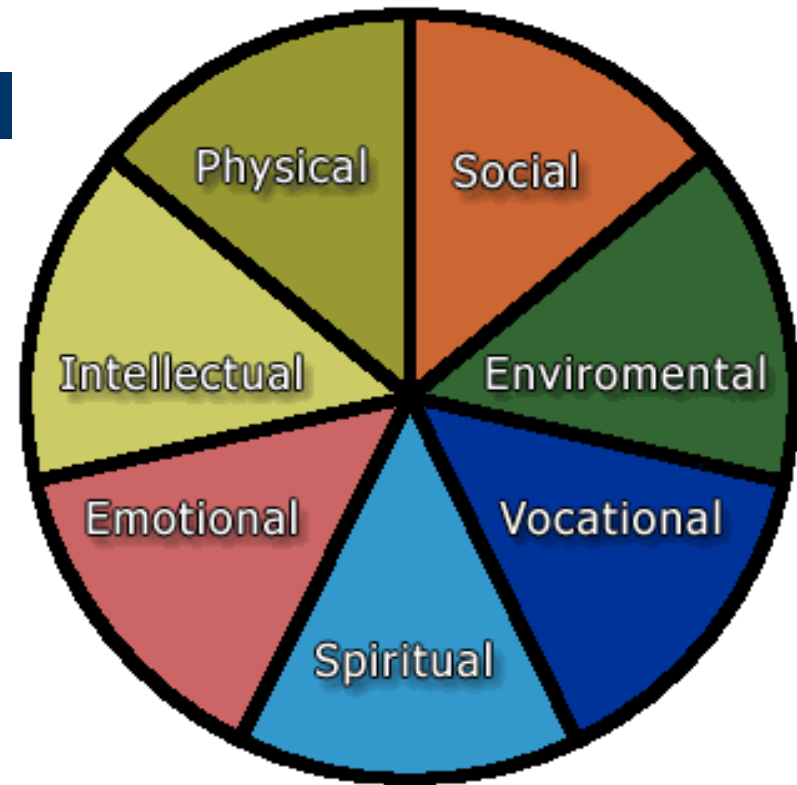
- Travel to beautiful, peaceful landscapes to rest
- Search for like-minded people
- Spiritual quest
- Workshops or treatments with specific aims
- Rest, recuperation, stress relief
- Active programmes of weight loss, detox, cosmetic surgery, etc.



External Factors	Internal Factors
Fashion and Tradition	
Obsession with Self and Celebrity	
Fitness and Sport	
Medicine	Search for Community
Therapy and Healing	Desire for Downsize
Psychology	Towards New Spirituality
Nutrition	Time-poor, Cash-Rich Élites
Government Policy	Curiosity

Domains of Wellness

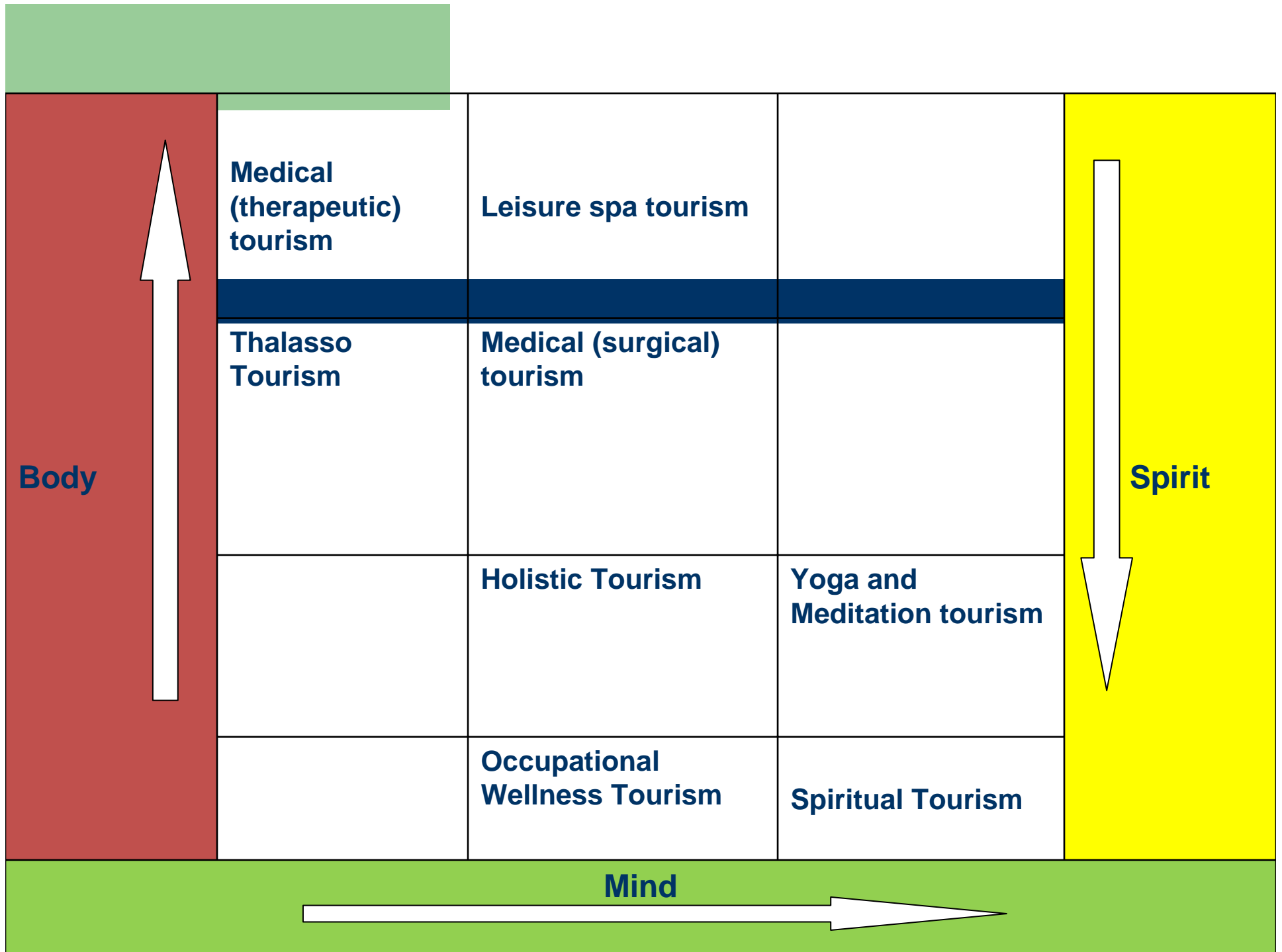
- Increasing recognition of multiple domains of wellness
- Development of numerous sub-sectors in the industry
- Customised, individualised programmes becoming more desirable for consumers
- Need for multi-disciplinary understanding in academic circles
- Need for communication & collaboration in the health & wellness industry



Typologies of Tourism



- Health tourism
- Medical tourism
 - Therapeutic
 - Surgical
- Medical wellness tourism
- Spa tourism
 - Medical/thermal
 - Leisure/thermal
 - Day spa
- Wellness tourism
- Holistic tourism
- Selfness tourism
- Occupational wellness tourism
- Leisure and sports tourism
- Spiritual tourism



Types of Health Tourism

Wellness

Medical

Holistic

**Leisure and
Recreation**

**Medical
Wellness**

**Medical
(Therapeutic)**

**Medical
(Surgical)**

Holistic

Leisure and Recreation

Medical Wellness

Medical (therapeutic)

Medical (surgical)

Spiritual

Beauty Treatments

Therapeutic Recreation

Rehabilitation (illness related)

Cosmetic Surgery

Yoga and Meditation

Sport & Fitness

Rehabilitation (lifestyle related)

Healing & Recuperation

Dentistry

New Age

Pampering

Occupational Wellness

Operations

Thalassotherapy

Nutritional & Detox Programmes

Holistic

**Leisure and
Recreation**

Medical Wellness

**Medical
(therapeutic)**

**Medical
(surgical)**

Types of Health Tourism Facilities



Retreat

Spas

**Hospitals &
Clinics**

Ashram

Hotels & Resorts

Festivals

**Leisure
centres**

Cruises

Type of Health Tourism Product/ Location	Typical Activities	Wellness Domain(s)	Typical Visitors
Traditional spas and spa towns (e.g. Central & Eastern Europe)	Sitting in mineral waters, massage, sauna, steam room	Physical, medical, curative	Older people with specific diseases or complaints
Hotels and day spas (e.g. UK, US, Caribbean, South East Asia)	Beauty treatments, relaxing massage, aromatherapy, jacuzzi	Cosmetic, pampering, relaxing	High income visitors, business tourists, more often women
Purpose built recreational spas (e.g. Austria, Germany)	Swimming pools, thermal waters, themed saunas and steam rooms, jacuzzis, fitness activities	Physical, relaxation, fun	Skiers, hikers, couples, sometimes families with children
Seaside resorts & thalassotherapy centres (e.g. France, Israel)	Hydrotherapy, salt inhalations, salt scrubs, seaweed wraps, tanning	Physical, curative, cosmetic	High income hotel guests, older visitors

Type of Health Tourism Product/ Location	Typical Activities	Wellness Domain(s)	Typical Visitors
Holistic retreat centres (e.g. Greece, Spain)	Yoga, massage, creative, spiritual & psychological workshops	Physical, mental, psychological, social, creative, spiritual	Mainly 'baby-boomers' aged 35 – 55, more likely to be women
Yoga & meditation centres (e.g. India, US, Canada, Europe)	Yoga, meditation, chanting, fasting	Physical, mental, spiritual	'Baby boomers', backpackers, 'hippies', professional women aged 40+
Pilgrimage centres (e.g. Spain, France)	Visiting spiritual landscapes, religious buildings, walking pilgrimage routes	Physical, spiritual	All ages but increasingly under 30, not necessarily religious
Medical centres (e.g. Hungary, South Africa, India)	Operations, cosmetic surgery, dentistry, special treatments	Physical, cosmetic	Western Europeans and Americans for whom treatment is cheaper abroad, mainly 30+

Summary of New Trends



- Shift back to indigenous & natural products & treatments
- Need for greening or spas & eco-friendliness
- More holistic tourism
- Growth of global wellness hotels
- More wellness areas at music festivals
- Increase in gastro-travel
- More fusion treatments (e.g. Aquaveda, Yogalates)
- Flexible delivery of treatments (e.g. own home, workplace, online, even in bars!)
- Wellpitals
- SpaLiving environments
- Eco-fit resorts
- Dreamscapes
- MySpa
- Hol-Life retreats
- Wellworking
- Budget spas

(Smith & Puczkó 2008)