



**The position of health-related tourism on a global scale –
Where we are headed**

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Trends and perspectives of the international health-tourism market

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Short introduction to World Leisure and Relax Group

The World Leisure GmbH plans, develops, and successfully realizes future-oriented projects involving international hotels, health and/or golf resorts and tourism.

The special focus of the World Leisure GmbH is providing holistically structured services and concepts in all project phases.

By concentrating on the decisive fields – i.e. consulting, development, realization, project management, and operations for hotels and resorts, tourist destinations, and health/wellness spas under the roof of the World Leisure GmbH, we guarantee our customers the success of their products.

The World Leisure GmbH consists of three partners with decades of success in this branch: ACN International, Drees & Sommer, and the Relax Group.

The Relax Group focuses primarily on the field of wellness, health, and well-being. It develops holistically oriented concepts and strategies for sustainable success in the wellness market.



Forward



In regard to the target groups and data about markets for health tourism which are relevant for Iceland, we will primarily discuss the trends and markets in North America and Europe.

In putting together this lecture, I have relied on writings and trend analyses by Faith Popcorn, Matthias Horx, TUI Group and WellnessFinder

Theses



The development prognoses for the rapid progress of media technology, global economic development, and value changes in society present a clear challenge to 21st century society in the area of health and in the health-tourism market.

Taking a closer look at the societal changes, we see that the development of custom-tailored systems in health tourism is required for the societies of both today and tomorrow.

Health tourism is one of the economic branches with the highest growth potential for the next ten to twenty years.

Health

Health stands for a positive concept which simultaneously accentuates the importance of social and individual resources for health as well as one's physical capabilities.

The absence of illness is not enough to explain the resource-oriented concept of health.

Health is influenced...

- 50% by one's lifestyle

- 20% by one's genes or constitution

- 20% by the quality of one's environment

- 10% by the healthcare system / classical medical practices.

Cultural changes have led to the fact that the term 'health' has been decoupled from the concept of illness.

Health has come to mean a form of active life planning; it has become a "metaphor for a new definition of quality of life."

("Der 6. Kondratieff", Faith Popcorn, Horx, Newjodoff, and others)



Awareness of health



Europe's system of spas was formerly a custom-tailored system for a society which no longer exists; now, however, awareness of one's own responsibility for one's health is increasing.

In America, prevention of illness is constantly growing in popularity; there is an increasing need for primary preventative medicine.

The clearest developments here are:

Increased awareness and care of one's body – instead of performance at any price

Health as the highest good, and maintenance of one's capabilities even at an advanced age

Less emphasis on purely curative medicine; more emphasis on prophylaxis, and on individual responsibility for one's health.

Fun and satisfaction in regard to maintaining one's health, and the orientation of one's lifestyle to these ends.

Promotion of health

All developments in health policies point to the direction of a growing need for the promotion of health in various population groups, with differing desires and expectations, as well as differing financial possibilities.

Health promotion is increasingly based on a process which gives people a higher degree of self-determination over their health, thus enabling them to boost their health themselves.

To achieve comprehensive bodily, mental, and social well-being, individuals as well as groups are increasingly beginning to satisfy their own needs, perceive and realize their own desires and hopes, and master or change their environment.

The type and quality of health promotion – consultation by doctors, organizations, institutes, and trainers – is steadily improving

Health and wellness-oriented people can gain comprehensive and qualified advice on health from all media, including advice related to their jobs, family problems, and other physical and psychological stress situations.

Health consultation



Health consultation is one of the pillars on which the entire societal promotion of health rests.

The concept of 'salutogenesis' (Antonovsky) in health consultation describes the strengths which help people develop their health (comprehensibility, manageability, meaning).

This concept has spearheaded new thinking in medicine, expanding the field to comprise 'health science'.

Industry is already supporting health consultation to a high degree in order to increase worker performance and motivation and thus contribute to a decrease in sick leave.

Tourism



Mass tourism, as has been defined and pushed by tour operators until now, is subject to short-lived trends and fashions as well as the hectic search for new destinations, themes, and trends.

Such trends and fashions don't allow the development of long-term strategies with holistically oriented concepts.

Currently, the main trends predicted by the tourism branch are on the one hand, the desire for new adventures, extreme experiences, and high-risk sports – and on the other hand, the desire for security and well-being.

Traveling to distant lands, at least as part of an anonymous mass of tourists all doing the same things, is increasingly considered to be 'ordinary' – and the superficiality of such vacations is making them more and more uninteresting.

To this day, the main areas in tourism are short and/or adventure trips, all-inclusive and/or cheap programs, as well as cultural programs.



Health Tourism



Health tourism has existed over the ages, under various names and signs, and in different societies (Kaiser baths, health resorts, spas, wellness, etc.).

For the first time, health tourism is developing into a basic part of society and to a worldwide growing lifestyle concept.

Its content and target groups are clearly defined and enable the development of long-term strategies for offers.

Health tourism of today includes the environment, the connection to culture and art, respect for other cultures, and consideration for other countries and peoples.

Trends in the American Health-tourism market

Americans generally have only two weeks of paid vacation per year. Spending these two weeks for a health vacation is recognized and established.

The so-called 'spa' vacation is in, and vacationers going on such a vacation do this with the goal of returning to their day-to-day routine relaxed and with new élan. Americans are willing, of course, to spend their own money on this.

In the last several years, ca. 20 to 25 new spas and beauty farms have opened yearly.

The growing need for primary prevention and the growing popularity of preventative medicine can also be seen in the fact that more and more day spas are cropping up in cities, allowing people to go for a day or even for a few hours of health and lifestyle training.

Trends in the European health-tourism market

Europeans generally have at least four weeks of paid vacation per year. More and more, they use this time to take several longer vacations as well as short vacations.

Corresponding to the trend towards more health consciousness, Europeans often use their second and third vacation of three to seven days for their own personal care and health.

The major European tour operators have reacted to this trend with their own catalogs and designations such as 'vital', 'care', 'slim & fit', 'relax', etc., but do not guarantee that the health vacations offered in these catalogs can actually meet the needs of their guests in a qualified and sustained manner.

Such offers are almost always formulated by the marketing departments of hotels and service providers.

Traditional resorts and resort hotels are trying to redo their well-known services from the rehab area, changing these from patient-oriented to guest-oriented, in order to gain access to the market of customers who pay services themselves.



Target Groups of the health-tourism market

Health is of value to all people, whether young or old. It is the quintessence of well-being and youth, the symbol of happiness. Seen in this manner, the health-tourism market can speak to all target groups.

Since 1998, surveys show increases in the numbers of those who intend to go on a specifically health-oriented vacation. In the USA, these numbers have continually risen from 20% to 37% today, and in Europe from 19% to 33% today. Almost 100% of those surveyed want to do something general for their health.

The main target group in the health-tourism market today is found in the well earning, educated middle class, and in this it is primarily women in the so-called 'best years' who are the main decision-makers for and users of health vacations.

Other important target groups include young, high-powered women looking for an antipode to their career stress, so-called 'young achievers', who are sports and fitness-conscious, mature businesspeople who want to reduce their stress, and early retirees with a good income, who above all want to enjoy their life as well as live longer.

Especially in the USA, companies who want to invest in the health of their top managers and organize the corresponding vacations for them have become important health-tourism consumers. In Europe, industry is currently limited to subsidizing health-oriented seminars covering topics such as learning and self-competence, team-building, and stress reduction.



Wellness in health tourism

The term 'wellness' – created from the two words 'well-being' and 'fitness' – has spread throughout the area of health tourism.

Every second hotel and resort in Europe – as well as more and more such institutions in America – now uses this term and is trying to get a foot in the door of this area.

The so-called wellness vacation has become a very popular type of vacation, and the so-called wellness tourism is experiencing a worldwide boom, attractive to all age groups.

The new wellness travel services are: Wellness and adventure tourism - Health empowerment - Beauty and cosmetics - Relaxation and meditation - Fasting and rejuvenation - Natural medicine and teachings - Combinations of medical services and vacation

Here, we already see a differentiation among wellness hotels, i.e. those specializing in wellness for those with ailments, wellness for seniors, wellness for young adults, wellness for career women, etc.

For this reason, when we speak about health tourism, we should actually speak about health and wellness tourism.



Marketing Health Tourism

Certification will play an important role in health and wellness tourism. Health and wellness services must become provable and measurable (analogous to the star-system of present-day hotels, for example), and they must be marketable.

The term 'wellness' will assert and position itself:

- A) As a synonym for relaxation, pampering, beautification, and an increase of pleasure and health, and
- B) To mean the active and self-initiated efforts for one's own health, with the goal of balancing body, mind, and soul and maintaining this balance, increasing one's quality of life, and as the way to lasting well-being and happiness.

Wellness will establish itself and be communicated in all media as a widespread concept for running one's life based on knowledge, capability, and the key competency to recognize one's own range of needs and satisfy one's own spiritual, emotional, social, and physical needs.

The market will subdivide wellness into "active wellness" – the learning and transformation of key health & wellness competencies, and in "passive wellness" – the need-oriented experience and enjoyment of wellness products, institutes, and services of all types.



Promising marketing strategies in health tourism

Successful marketing strategies can only be developed in close cooperation with the special offers and the relevant target or scene group.

Health and wellness tourism requires addressing guests specially and individually. This already gives them the feeling of well-being, of their different, personal desires being dealt with.

Marketing strategies for this segment can only succeed through a knowledge of the completely personal health and wellness profiles of customers.

This strategy promises success in travel agencies, in health and wellness hotels or resorts with their individual profit centers, and in application areas or the corresponding day spas and health and wellness clubs.

It is thus imperative to use the World Wide Web in marketing efforts, and use Internet health and tourism marketplaces as well as wellness platforms and clubs.

Of course, the best advertisement is and remains the satisfied customer, who has gotten the most out of his or her wellness vacation and tells all his or friends about it.

Projects in health tourism

Health and wellness tourism must use believable and special concepts which integrate knowledge, technology, consumption, economy, ecology, and social competence. This requires especially planning and realizing concepts for landscapes and areas. These must contain less planned functions and structures and much more naturalness and honesty in connection with rhythm and time, environment and aesthetics, scents and sensuousness as well as sounds and tastes.

Tourism and hotels were the first to recognize the closeness of the core product vacation/rooms and the health/wellness movement. Unfortunately, however, the transformation has seldom been believable and thorough. The results are stylistic incongruities, inconsequential and unimportant details, a bad or purposeless ambiance, and borrowings from styles and philosophies ripped out of their context and locations.

As in hardly any other area, project development in the area of health and wellness tourism requires interdisciplinary cooperation and processes from the beginning – much less from the point of view of the real estate developer and architect, but from the view of the interior designer, the doctor, the health trainer, the teacher, the psychologist, and the tour operator and marketing team.

Conception, planning, realization, operation, and marketing must be homogeneous and subject to comprehensive quality management from the beginning and all knowledge in the business must always be soundly, flexibly, and innovatively transformed and further developed.

Services in health tourism

Health and wellness tourism must be able to recognize the current individual needs of guests and react to the following main needs areas in a qualified and competent manner:

- These include desires for:
- Well-being and happiness
- Relaxation and stress-reduction
- Balance between living and working
- Pampering and attention
- Harmony and the increase of sensual perceptions
- Physical experiences
- Life-increasing and enhancing measures as well as eternal youth
- Beauty and attractiveness
- Creative self-realization
- Empowerment and competency
- Spiritual meaning
- Control of one's lifestyle in the context of health
- Increase of energy
- Acquaintance with and experience of the teachings of the Far East

Services in health tourism

-as well as desires in the areas of medicine and therapy for:
- Effective and natural treatment of acute chronic illnesses
 - Effective help for such disturbances as headaches, sensibility to meteoric changes, chronic fatigue, sleep disturbances, etc.
 - Anti-aging (long life with high quality)
 - Acquaintance with and experience of medicine and therapies of the Far East
 - Competent advice on psycho-social conflicts and in difficult situations
 - Newest medical diagnostic procedures and therapies
 - Medical attention as well as doctors who take time for thorough exams and conversations
 - Programs to help smokers quit smoking
 - Purification and detoxification
 - Tumor prevention
 - Holistic medical beauty treatments
 - Gentle medical beauty treatments.

Mega-trends and conclusion



Mega-trend health: From crisis-plagued sector to booming branch

Never before has health had such a high value, and never before has the health-oriented consumer been as educated as today.

The mega-trend health is making the medical sector to the central field of societal conflict

While classical and administrative medicine is slipping deeper and deeper into a crisis, patients are fleeing the system: self-help and self-medication are becoming mass movements, alternative healing methods are entering new symbioses with technological innovations, and medical methods are globalizing themselves.

Preventative and adventure medicine are shaping the coming health system as well as the self-image of people.

Parallel to the old system, a new, 'symbiotic' health system is developing, in which the contradictions between functional and alternative medicine are disappearing.

Mega-trends and conclusion

Mega-trend wellness: From organic functioning to psycho-social health

In the industrial society, health used to be defined as the "absence of illness". In the wellness culture, however, a new, active, and activating definition of health is developing: Balance of body, mind, and soul is at the middle of the discourse.

In companies, families, and institutions, a new debate about the many dimensions of stress in the new mobile society is beginning.

Empowerment and self-realization are original health subjects. Intellectuality itself no longer has a special image, and topics dealing with the body are moving towards the center of self-perception – away from being the neglected side aspect they once were.

The body is the last refuge of the individualist, the carrier of erotic happiness and energetic experience. Wellness, sport, and fitness trends will experience in coming years an unparalleled boom, beauty will become a cult category, nutrition and longevity will generate sustained trend streams.

Wellness will finally become a productivity question which will be thematized by companies themselves.



Mega-trends and conclusion



Mega-trend downshifting: From consumption overdose to new asceticism

The consumer society drowns people with an overdose of information and goods – we are going from a society of overabundance to one which has overdosed.

For this reason, a "new purism" is becoming the most powerful cultural trend. Asceticism is not understood as renouncement and deprivation, but rather as a luxury, as the recreation of mental and material balance.

Only he who goes without can still (selectively) enjoy.

This value change is accompanied by a strong social movement to downshifting – to getting out of job and lifestyle situations which are felt as being too stressy and complex.

Motto: less material consumption → more time, i.e. luxury.



Conclusion



If it heeds these mega-trends, health tourism can definitely become one of the economic branches with the highest potential for growth during the next ten to twenty years.

Currently, health tourism still lacks adequate concepts, projects, and marketing structures; it must develop the custom-tailored systems for the society of tomorrow.

Health tourism must use the tried and true touristic marketing structures, but distance itself from them at the same time as well and develop new marketing systems in order to be able to build up and establish holistic, real, and long-term strategies for programs and services in this market.

Let's get busy!

Thank you very much for your attention

