Health Tourism

Lecture 12

The future prospects of medical and wellness tourism.

I have travelled so much because travel has enabled me to arrive at unknown places within my clouded self.
(Sir Laurens Van der Post, quoted in 1994:99)

1. A summary of contemporary global and regional development in health and wellness tourism
   • The following table provides a summary of the main health and wellness resources and assets to be found in the different regions of the world, the way in which they are used, and the main places where they tend to be offered.
   • Many countries have natural healing assets such as medical, thermal and mineral waters, special muds, caves, climate, etc. These countries tend to have a long history of medical tourism and are often only just starting to move into more leisure-based wellness tourism.
2. Directions of development

The future of health and wellness tourism has two main directions.

• One, in which very specialized, often small scale developments open up (e.g. Sukko Cultural Spa), servicing either the upmarket or the "hardcore" holistic demand.

• The other main and, at least in the short term, more influential trend will be the blend of services and forms.

(Source: Smith and Puczkó)

• Sukko provides individual spa packages based on the philosophy of Thai Ayurveda and other ancient wisdom descended through the generations, and they can be tailored to fit visitors’ requirements, including weddings, honeymoons, outdoor sports, etc.

(Source: Smith and Puczkó)
2. Directions of development / cont’d

- This new ‘well-blending’ tourism, however will face challenges. Operators and marketers will find it more and more complicated to differentiate themselves and to create their own identities.
- The next table shows the likely future trends in the use of resources and assets,
  - indicating where certain practices or facilities are likely to increase (▲),
  - where they are likely to stay the same (►),
  - and where they are non-existent or hardly developed (no symbol).
  - The second column denotes the way in which certain practices and products are being exported around the world.

*Figure 12.3
Trends in the Use of Resources. Source: Smith and Puczko.*
2. Directions of development / cont’d

- Figure 12.5 indicates the interrelationship between spas and the other forms of facilities.
- It is anticipated that some sort of spa and spa treatments and services will be available in almost any health and wellness tourism, from mobile spas and residences through festival and cruises to clinics and hospitals.

![Figure 12.5: Inter-relationships between Spas and other Health and Wellness facilities. Source: Smith and Puczko.]

3. Future trends in Spa development and management

- Given that spas and spa hotels and resorts are the main growth sector in all parts of the world,
- and that spa products are being exported everywhere,
- it is hardly surprising that the majority of industry research has been directed at spas.
4. Health, wellness and new lifestyle trends

- In terms of tourism, ISPA (2008) estimates that 63% of United States Spa-goers have visited a spa while travelling away from home.
- Although women are more likely than men to be spa-goers, spa travelling reduces the gender gap considerably as over 30% of spa travellers are male.
- Spas are therefore incorporating lifestyle elements, such as fitness, healthy nutrition and stress relieving techniques.
- The other parts of the world, especially the developed countries, will follow these trends, especially regarding lifestyle changes.
- In many European countries or in Australia, for example, health consciousness (e.g. diet, exercise) has already peaked and is expected to remain at the same level.
- This will create a steady demand for health tourism products, however, not to the same extent for medical and wellness services.

5. Consumer needs and demand

- Motivations for visiting spas or wellness centres can vary greatly according to the age, nationality, lifestyle, or gender of a visitor.
- Medical tourism has been and remains very much dependent on external financial resources, for example national or private health insurance.
- Most of therapeutic and surgical treatments are at least co-financed by an external body.
- The major tourist flows of health and wellness tourism, besides domestic and intra-regional tourism (e.g. within Arabia), are likely to follow that of mass tourism:
  - From North and West to the East – from Western Europe to Central and Eastern Europe and to South-East and Far-East Asia
  - From ‘Down Under’ to South-East
  - From North to Central and South – from North America to Central and South America.
6. Facilities, services and experiences

- Singer and Monteson (2007) predict that spas will pay more attention to creating better facility areas that are more like experiential, self-service treatment areas rather than amenity areas.
- Spas will also need to focus more on hospitality.
- Spa staff needs to be 'experience makers' and 'memory makers'.
- Spas are also likely to go mainstream in order to attract a wider range of people and not just the wealthy.
- Treatments and pricing need to be adjusted accordingly, offering simpler, more affordable services.

7. Product development and extension

**Case Study: British Airways Travel Spa (at Heathrow Airport, London)**

**Elemis travel spas**

Flying can be an exciting and exhilarating experience, and to make sure you enjoy your journey with us to the full we do everything we can to ensure your wellbeing and comfort. To help give your skin and body the best possible protection we have teamed up with luxury British Spa and skincare brand Elemis, who will be offering spa therapies and inflight skincare products to rejuvenate your skin, awaken your senses and refresh you on your journey.

**Spa therapies**

Elemis has designed an exclusive British Airways menu for both men and women. Departing customers (e.g. First passengers) can benefit from treatments designed to aid sleep and relaxation, whilst therapy for new arrivals will leave you feeling re-awakened and energized.

*Shiatsu Power Back Massage* – select from a choice of three uniquely developed massage sequences combined with 'Elemis Touches' performed by an Elemis Spa Therapist on a luxury massage chair.

*Intelligent Massage Chair* – select from a choice of three exclusive programmes and with the minimum of fuss you are left in peace.

*Intelligent Massage Chair with Elemis Spa-Therapy* – select from three exclusive programmes complemented by your choice of one of the following treatments:

- Soothing Scalp
- Flying Feet
- Arm and Hand Hydrator
- Anti-Age facial Reviver
- Tired Eye Reviver
8. Delivering services

• The Spas Research Fellowship (2008) suggests that new ways of delivering services are likely to be developed in the future.

• For example, mobile spas have expanded in the United States and are frequently used for parties, office workers, etc.

• There appears to be a general expansion of the media alongside that of the health and wellness industry, such as
  - web-based information sites, journals, informative books, CDs for home instruction, chat rooms, and even ‘spa friends’ online (90% of North American Spa travellers plan trips using a web site (SRF, 2008).

• We can expect that those who log-on to an e-retreat or use a home spa service more easily become health and wellness tourists, than those who do not follow any of these new services.

9. Business development

• All health and wellness businesses need to be careful.

• The market appears to be saturated in some locations and the flow of services and new ideas is slowing, and many trends in tourism are going in a single or opposite direction.

• For example, there are already concerns in Germany (the largest wellness market) about a saturation of the market.

• However, the quality of wellness developments were so high in Germany that experts from the German organization Deutscher Wellness Verand have been invited in recent years to serve as advisors for countries developing wellness services and facilities.
Sustainable health and wellness tourism

- Consumers are now factoring in a spa’s green commitment when they choose a spa.
- Spas are positioning themselves with more green products, for example:
  - Many skincare companies are getting rid of paraffins and sulphites
  - More and more natural ingredients are used in treatments, such as local plants, herbs, and fruits
  - Using solar lighting
  - Recycling and purifying water flowing into ponds and waterfalls
  - Using recycled flooring or furniture
  - Using ‘waterless’ urinals and recycled toilet paper
  - Use of non-toxic substances for varnishes and interiors
  - Soaps without phosphates, etc.

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**Case Study: Hungary – The Year of Waters (2008)**

Every year the Hungarian National Tourist Office aims to motivate domestic tourism by introducing a yearly campaign. After the Year of Green Tourism in 2007, in 2008 one of the most attractive tourism features of the country, the ‘Waters’, that is thermal and fresh waters are in focus. During the campaign they emphasize different areas and try to entice tourists with special offers and programmes. Amongst the natural resources of Hungary the healing spring water and thermal water are especially important. On the international scale Hungary is among the top five countries that have the most thermal water (together with Japan, Iceland, Italy, and France). The natural assets based on which the campaign is built are:

- 1,372 thermal water springs
- 385 settlements with either thermal or healing baths
- 221 certified spring water sources and 203 healing water springs
- 13 health resorts of Balf, Bük, Kékestető, Lillafüred, Balatonfüred, Debrecen, Eger, Gyula, Hajdúsághomás, Harkány, Hévíz, Parád, and Zalakaros
- 56 certified medical hotels
- 66 certified thermal and medical baths (9 of which are in Budapest)
- 5 medical caves
- 5 sources of healing mud
- A nofet (dry CO2 bath).

(Hungarian National Tourism Office, 2008)
11. Development concepts

- **Wellpitals** – the blend of hospitals and spas could produce a new phenomenon, a ‘wellpital’.
  - A wellpital offers various medical as well as wellness and spa services – without the hospital, clinic or sanatoria, or even a standard hotel feeling and image.

- **SpaLiving Environments** – no longer just a North American speciality, more people can enjoy the facilities of spas in their neighbourhood.
  - People can move permanently, or temporarily (e.g. to a summer home) to spa lifestyle communities, which may give boost to time-share developments.

- **Eco-Fit Resorts** – these spas or retreats would offer people the chance to relax and improve their physical and mental health through nature-based recreation in eco-friendly surroundings.

- **Dreamscapes** – operators will look for new demand segments. In this search, young people and customers of luxury products and brands can be very appealing for developers.
  - The combination of luxury brands as well as hi-tech equipment, for example music, games or cinema with spas can attract these new segments.

11. Development concepts / cont’d

- **MySpa** – this is more of a lifestyle trend than tourism related, but it can give some ideas to managers and developers, too.
  - Technological development can provide spas, hospitals, etc. with very sophisticated solutions that give competitive advantage. Real time information about health status during a treatment or retreat can be used to make personalized recommendations.

- **Hol-Life Retreats** – these are retreat-style wellness centres or spas where people will go for some time away from their stressful lives and workplaces to recover and refocus on themselves and their needs.

- **WellWorking** – corporate employers and stressed employees will find the combination of working and well-being more and more necessary.
  - Occupational wellness is no longer new to many western companies and employees.

- **BudgetSpas** – spas almost without exception are expensive places, especially if no external financial support (e.g. for medical treatments) is available.
  - We can expect that following the trend of creating ‘budget’ versions of services (e.g. flights, hotels or cruises), soon we will see budget spas that provide the basic services for everybody, but then everything else has to be paid for separately, according to what people actually use.