



# CBI Product Factsheet: Wellness Tourism from France, Germany, Italy and the UK to Latin America

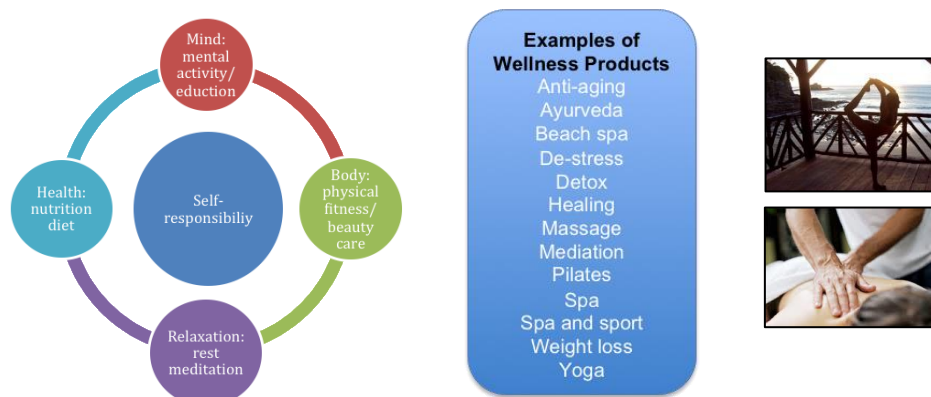
## 'Practical market insights into your product'

Wellness tourism is a growth market as European travellers are looking for ways to escape from their stressful lives and relax. There is strong competition for European wellness travellers both from countries within Europe and from new destinations in Asia. To compete, Latin America needs to build on its strong active, ecotourism image and authentic traditional skills to deliver a high quality, distinctive product that will add value to its existing tourism product.

### Product Definition

Wellness tourism has developed rapidly since the 1970s as a component of health tourism. It relates to physical and emotional wellbeing based on relaxation and the proactive prevention of sicknesses. Wellness tourism includes trips or holidays of which the main purpose is to proactively seek authentic or location-based experiences, treatments or therapies that help physical and emotional wellbeing. It may include, for example, spas and resorts that offer a variety of treatments such as beauty treatments, massages, detoxification, Ayurveda treatments, and Thalassotherapy. Emotional wellness focuses on yoga, meditation, and mindfulness, among other aspects. Medical treatments such as facelifts and corrections are not included, nor are fitness and other strenuous physical activities.

Figure 1: Elements of Wellness



## Traveller profile

### Demographic characteristics

Wellness travellers from France, Germany, Italy and the UK can be found in all age and income groups. However those taking a long-haul trip to Latin America are most likely to come from the higher socio-economic groups and international spa tourists are predominantly professional women (75%).

The Product Factsheet 'Wellness tourism by EU residents' identified that the German speaking countries, particularly Austria and Germany, have the most potential to take wellness holidays. It also identified six differentiated consumer groups in the European market. The percentage of each segment relates specifically to the German market but is thought to be similar across France, Italy and the UK.

- The ambitious health vacationer** (27% of wellness-interested tourists) has an above-average experience with wellness vacations. The majority is aged between 40 and 69 (54%). They expect massages and body treatments. 33% additionally expects a swimming pool or water park, they also have an interest in special wellness, health, and fitness offers. They are likely to purchase additional products (e.g. oils or cosmetics).
  - The recreation-seeking vacationer** (25% of wellness-interested tourists). The second largest segment. More than half of the group members are between 20 and 49 years old. Their incomes lie between average and low. 25% has already had experiences with wellness vacations. They expect saunas and solariums. 61% wish to have massages and body treatments. Many of them also expect a swimming pool or water park (30%).
  - The dignified bon-vivant** (19% of wellness-interested tourists). People in this segment have medium incomes, 56% are 50 or older and 20% have previous experience with wellness holidays. This segment stands out because of its above-average interest in beauty treatments and basic additional products (e.g. cosmetics). Their expectations for a wellness holiday are exceptionally high, requiring excellent atmosphere, ambience, nice hotel, good service, good food, leisure and cultural activities are high. The motives 'relaxation' and 'well-being' are extremely important to them.
  - The athletic and active vacationer** (14% of wellness-interested tourists). This is (on average) the youngest segment, 42% are younger than 40 and their income is above average. They do not have much experience with wellness vacations, and are mainly
- Design your product around 'pampering' and 'stress reduction'. Communicate how your product can help escape the everyday hassle and recover from burnouts and fatigue. In addition, this segment is interested in services with anti-ageing benefits, as well as mind-body retreats.
  - Consider offering additional products that are produced in your region (such as oils, scrubs or soap) that you can sell at your destination.
  - Provide a list of sauna activities and beauty treatments you can offer. Clearly state the price for each purchase. Include these on your website.
  - This segment is less likely to be able to afford a long-haul wellness trip to Latin America.
  - Quality is a most important for this segment. Ensure all your services and products are of a high quality.
  - When you target the elderly travellers from this segment, communicate clearly how your services can provide health benefits (without emphasising their age). Do not limit your offerings to physical wellbeing and pampering treatments, but also offer 'mind-body' therapies.
  - Consider offering additional products from your region (oil, scrub, soap etc.) that you can sell at your destination.
  - If this segment is travelling to Latin America, their budgets are likely to be restricted and they will be looking for good value.
  - Outdoor activities appeal to this segment. Consider how you can offer an active outdoor component.
  - This younger segment offers potential to draw on adventure travellers that want to combine an active holiday with a wellness

- interested in all kinds of massages, body treatments, fitness and sports facilities.
- **The sceptic (11% of wellness-interested tourists).** Members of this group have a sceptical or negative attitude towards wellness vacations. Personal restrictions (e.g. unable to travel) are often the reason for this attitude. People of this group are spread evenly across all income and age groups.
- **The problem-oriented novice (5% of wellness-interested tourists).** This segment mainly consists of older travellers (60+), with almost no experience in the health and wellness sector (less than 5%).

product.

- It is not recommended to target these segments who are unlikely to be interested in a wellness holiday in Latin America.

## Product specifications

- **High levels of quality, comfort, and service are expected.** Wellness travellers from France, Germany, Italy and the UK are generally experienced, sophisticated travellers (especially the 'dignified bon-vivant' segment). They expect quality; older age groups will generally need more comfort and service than younger travellers.
  - Accommodation must be comfortable, clean, secure and well maintained.
  - A good variety of healthy meals should be available
  - Personal attention needs to address clients' specific needs, symptoms or complaints. Knowledgeable and experienced advice on health or wellness is expected from friendly staff.
- **Use locally produced food** whenever possible. Wellness travellers will expect a variety of healthy food but they prefer good quality locally sourced products to imported goods.
- **Allergy awareness.** Allergies to a range of dietary products eg, dairy, gluten, nuts are becoming increasingly common amongst consumers in France, Germany, Italy and the UK. Specialist dietary requirements, such as vegetarian and vegan, need to be available. Amongst wellness travellers there is a growing expectation that their dietary needs will be accommodated.
- **Increased focus on spiritual wellbeing.** There is a growing demand for body-mind-spirit offerings in Western Europe. Meditation and yoga for example, are considered a holistic, integrated, and lifestyle-oriented wellness tool, which is becoming more and more accepted for enhancing spiritual wellbeing, as well as enhancing cognitive functioning and performance (See also the segments 'ambitious health vacationer' and 'dignified bon-vivant').
- **Authentic offerings.** Wellness travellers

## Considerations for action

- Offer quality treatments, but also pay attention to service and hospitality and to the design, decoration and comfort of your facility.
- Staff must be well trained: polite, attentive and knowledgeable about the treatments they offer. Qualifications and certificates can be displayed to reassure guests that staff are professionally trained.
- Educate kitchen staff on the use of local products, nutrition, vitality, and organic and dietetic food.
- Offer menus that cater for a range of dietary needs and preferences.
- Tour operators should develop packages focussed on spiritual wellbeing, such as meditation or yoga holidays. Wellness accommodation providers should offer options for yoga or meditation services either at their own accommodation or externally.
- Offer a unique and differentiated product

are increasingly looking for new, authentic experiences or treatments. Such offerings can be very diverse, ranging from traditional/culturally-based therapies like acupuncture or body massage to mind-body retreats. They will find new, authentic products interesting as long as the product benefits are clear. They also find it interesting to receive wellness services that include cultural elements from the destination country.

- **Complementary non-wellness activities.**

The majority of wellness travellers to Latin America from France, Germany, Italy and the UK will be undertaking a combination of activities during their trip. The non-wellness activities will generally be interested in include:

- *Active and natural components.* Active walking, trekking, cycling, kayaking, horse riding, windsurfing, surfing, or other outdoor physical exercise are increasingly combined with wellness tourism and are particularly popular (see also the segments 'ambitious health vacationer' and 'athletic and active vacationer').

- *Cultural components.* Cultural and historical excursions and activities (such as art, craft or musical workshops) are an interesting component of a wellness holiday, especially if cultural/historical attractions and activities are unique to the destination.

- **Sustainability** is an increasingly important for wellness travellers for whom environmental sensitivity and nature can be integral to the wellness experience. There is an expectation that their holiday will be managed responsibly particularly if it involves an element of ecotourism. French, German, Italian and British wellness tour operators are increasingly promoting their 'responsible tourism' credentials and therefore require suppliers who will meet their standards.

### Legal requirements

- **Compulsory domestic regulations/standards.** Before planning how to attract wellness travellers from France, Germany, Italy and the UK, it is important to ensure your business complies with regulations in your own country. Check relevant regulations for the type of wellness product you provide, as well as regulations

by combining location-specific and authentic elements, such as local natural assets and local traditions, skills or ingredients/herbs.

- Work together with local wellness or travel trade associations and together develop a national brand image as a wellness-tourism destination. An approach for such development can be based on your country's traditional or natural-based wellness and healing traditions. It can also be combined with other elements of your tourism product that fit with wellness, for example building on the active, volcano, nature and ecotourism offer. (In Bali, for example, spa resort is promoting the healing benefits of natural volcanic lava).
- Location-specific offers can become the 'signature treatment' of your destination, which also serves to distinguish your destination from competitors.
- Combine wellness treatments, physical activity, and cultural activity. Instead of offering e.g. a basic treatment in a spa, offer additional options such as meditation and yoga classes at a local cultural site, at a location with a spectacular view, or in a wellness retreat near the beach.
- Offer recreational activities in a beautiful natural setting, such as a morning walk, river swimming or visits to hot springs.
- If your business is run sustainably make sure this is included on your website and in the information you provide to European tour operators. However be careful not to oversell your sustainability credentials ie, 'green washing'.

### Considerations for action

- Make sure you comply with all relevant regulations for wellness services in your country. Check for example with national wellness associations.
- Study the [Travel Package Directive](#). Although it is not applicable to long haul tourism, it can help you to better

on health, sanitation, and safety.

- **No legal requirements.** There are no legal requirements for long haul tourism as it is offered outside the EU market. However, there are some EU travel and consumer laws that are applicable to tourism within the EU, for example the Travel Package Directive that protects consumers who contract package travel within the EU.
- **An increasing number French, German, Italian and British tour operators are passing on liability to their suppliers.** Most British, French, German and Italian travellers purchase travel insurance before going on holiday. However tour operators across the EU are increasingly asking potential suppliers and local partners to have liability insurance to cover possible damage and accidents involving their customers, especially for travel outside the EU. This is because their own liability insurance does not usually cover damage caused by third parties. Liability insurance maybe difficult to obtain in Central and Latin America but suppliers with this insurance will have a great advantage.

#### Non-legal requirements

- **Voluntary standards.** The EU has a number of voluntary standards/certifications for the wellness industry. Some of these standards are international and can be applied by wellness providers around the world, for example:
  - ['EUROPESPA' standards](#). These standards are initiated by the European Spa Association and contain quality and safety criteria for health and medical wellness providers.
  - [Best Health International Standards](#). These are international quality standards for wellness and health tourism.
  - [Wellness-hotels & resorts international](#). Leading German quality standards for luxury wellness hotels and resorts. The fundamental principles of the W-H-I quality criteria have been adopted by several hotels and serve as suitable guidelines for upmarket wellness hotels in DCs.
  - [Spa Standards of the British Spa Association](#). These are standards of quality and service within the spa industry.
- **Sustainability.** British, French, Italian and German wellness travellers are increasingly attuned to the importance and value of green, eco, sustainable and organic practices and products. In Latin American where there is a strong nature and eco-tourism image, wellness travellers have an expectation of sustainability and wellness tour operators are increasingly looking for sustainable partners. Latin American providers can use this to their advantage by making their products more sustainable.

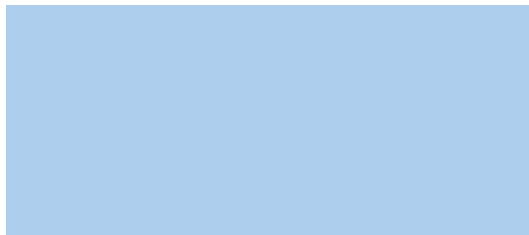
understand the EU tourism market.

- Study the terms and conditions of active/adventure EU tour operators as these reflect EU travel and consumer laws and will give you an understanding of what they expect from their local suppliers.
- Communicate to your customers the importance of obtaining travel insurance, especially if your company does not have liability insurance.
- Obtain liability insurance and communicate that you have such insurance.
- If it is not possible to purchase liability insurance in your country, constantly lobby your authorities and trade associations to make such insurance possible. Also discuss it with (potential) British, French, German and Italian partners as they might have some influence.

#### Considerations for action

- Although obtaining voluntary quality standards and certifications will help Latin American wellness tourism providers to enhance competitiveness, it might not be financially feasible as the cost of implementation can be high and regulations can be rigorous. Nevertheless, using such standards as a guideline increases your chances to meet the expectations of wellness travellers' from France, Germany, Italy and the UK.
- Find out if there are any local wellness standards that apply to your business.
- Implement sustainable best practices or apply for sustainable certification. For more information, refer to CBI's study ['Sustainable Tourism Certification \(Incubator market\)'](#).

Examples of credible sustainable and/or green tourism certification programmes are [Green Globe](#), [Rainforest Alliance](#), [STEP](#) and [Travellife](#). An important labeling organization in France is [Voyages Pour La Planète](#). In Germany the use of [TourCert](#) is growing. There are also local sustainability initiatives, for example, Smart Voyager in Ecuador and CST in Costa Rica, TOPS in Nicaragua.

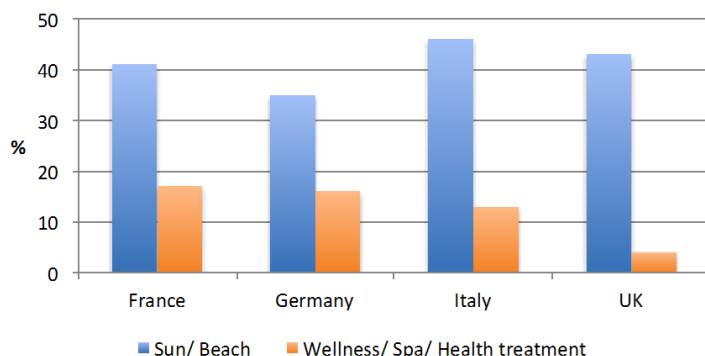


For more information about the expectations of tourism buyers in the EU+EFTA tourism market in general, refer to CBI's 'Buyers' Black Box' for tourism.

## Trade and Macro-Economic Statistics

### Outbound travel statistics

Figure 2: Main reasons for going on holiday in 2012



Source: Attitudes of Europeans Towards Tourism, Flash Eurobarometer 370, March 2013

- **Wellness holidays are more popular with the French, Germans and Italians** than is average across the EU, with over 12% of consumers from these countries saying that they had taken a wellness, spa or health treatment holiday in 2012, based on a European Commission survey in 2013.
- **Wellness tourism continues to grow;** it represents about 6% (524 million) of all domestic and international trips worldwide and about 14% of expenditure. Global wellness tourism is projected to grow by more than 9% per year to 2017, nearly 50% faster than overall global tourism (Source: *Global Spa & Wellness Summit, The Global Wellness Tourism Economy, SRI International October 2013*).
- **Strong competition from Asia.** Most wellness trips from France, Germany, Italy and the UK are taken within Europe. However an increasing number of wellness travellers are interested in wellness activities offered abroad or incorporating an element of wellness into their holiday. Asian destinations, particularly Thailand and India, are seeing the strongest demand for wellness holidays from these European countries and are mostly considered to be good value for a high quality product.

### Considerations for action

- Although these markets are strongest for wellness trips, the majority of these holidays are taken within Europe. It is important to compare this data with the inbound data for your country, to see which of these European markets you are currently attracting.
- Research the wellness market to find out which products will best suit your potential guests. If you already offer wellness services, ask your guests what additional products they are interested in. Adapt your products to meet the changing needs and profile of wellness travellers.
- To compete for wellness travellers from these European countries, Latin American wellness providers will need to differentiate themselves from other wellness destinations both on their product offer and on price. There is a danger of providing 'just another spa resort'. Consider what is distinct about your offer, for example by using local traditional techniques and products, or by combining wellness products with your other distinctive tourism product such as eco-tourism or surfing for the younger



demographic (eg, Stand-up Paddle boarding Yoga).

### Tourism expenditure

- **2012 saw renewed growth in expenditure.** Over the last five years international expenditure on general tourism has been decreasing in most European markets. However 2012 saw increased expenditure in Germany and the UK, although the decline continued in France and Italy.
- **Growth in potential luxury travellers.** Despite the economic climate in Europe, the number of High Net Wealth Individuals in Europe (HNWIs – those with investable assets of at least US\$1m; €750,000) has grown by 10% since 2009. This provides a potential pool of travellers with the means to pay for top-class accommodation and associated wellness facilities and services.
- **European travellers over-65 years old have increased their travel expenditure** by 32%, more than any other age group. It is not certain that this trend will continue as pensions become squeezed, however this is currently an age group that has disposable income and may have health issues that could be addressed by wellness products.
- **Tourism expenditure by the 15-24 year olds** over the past 5 years has increased but by just 2%, whereas amongst 25-44 year olds it has decreased by 20%.

### Considerations for action

- Despite slight improvements in expenditure in Germany and the UK, all these European markets are still very price sensitive. The wellness travellers to Latin American will be from the social groups that are least affected by the economic situation however they will still be looking for good value and high quality at all price levels.
- The top end of the market has more choice of holiday destinations and products than any other segment and has high expectations of the experience they seek including exceptional service and exclusive products.
- If you have a tourism product (eg, nature or eco-tourism) that attracts this demographic, consider whether you can add value by offering wellness products.
- There is some renewed growth in the market amongst adventure travellers and the 18-24 year olds. Although these are not core wellness segments there is potential to attract them by adding wellness products to their itineraries if they can be provided at the right price level.

For more information on tourism trade statistics and macro-economic indicators in the EU+EFTA market, refer to CBI's 'Tradewatch' for tourism.

## Market Trends

### Social market drivers

Social trends in France, Germany, Italy and the UK that are driving the growth segments in wellness tourism include:

- **Male wellness travellers.** The number of male wellness travellers is rising. Although there are no official statistics on the market size of this segment, France, Germany, Italy and the UK wellness business are seeing an increasing number of male wellness customers, who also go abroad for wellness services. This trend is driven by ageing male travellers (born between 1946 and 1964), as well as younger ones, who are comfortable with the concept of male beauty and would like to hold on to their youthful look. Male wellness travellers from all four countries travel either with their wives or partners, or

### Considerations for action

- Look at how you can adapt your current products and facilities to appeal to male customers including male grooming and massages. Adventure facilities and spas are particularly popular with men. Develop duo packages focused on couples.

in a group of friends.

- Single travellers.** There is a sharp increase in the number of single households in the EU the most single households are Italy, the UK, France, and Germany. Singles are increasingly interested in wellness trips.

    - In Germany, the market share of wellness-interested singles increased by 26% from 2011 to 2012.
    - In the UK single, high-earning professional women under 40 are the major consumers of 'holistic holidays' particularly to Asia.
  - Family-wellness travel.** Family-wellness travel is a growing segment. This trend started with luxury wellness hotels and is now reaching the less luxurious tourism segment as well. This is expected to be a prominent trend in 2013.

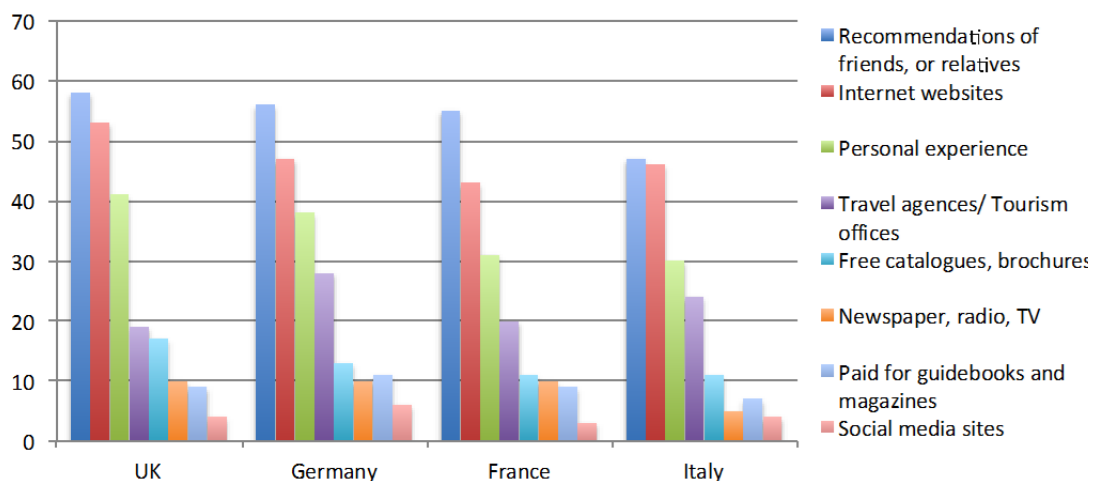
    - German families increasingly take wellness holidays together. Their market share in 2012 was 11%, which was an increase of 25% from 2011.
  - Young people, under 30 year old, 'Gen-Y'** are showing an increasing demand for adventure and eco facilities and spa. These young travellers have few physical health problems compared to older travellers but young professionals with high incomes are often in stressful jobs and for ways to unwind and 'de-stress'.
- Single travellers like to engage in social activities when they travel. They also value quality and a variety of wellness activities and sports.
  - Develop offerings suitable and interesting for families (meals, places to play, animation, swimming pool, etc).
  - Guests without children as well as family guests prefer to have 'child free zones' during their wellness trip. Set clear rules concerning children. Consider creating childfree areas or times when children are not allowed to visit certain areas.
  - Consider how your wellness offer fits with adventure and eco-tourism facilities and who they can be jointly promoted through digital media promotion - this market will be very active on social media.

For more information on market trends on the EU + EFTA tourism market in general, refer to the CBI's 'Trend Mapping' for Tourism.

### Market Channels and Segments

The British, French, German and Italian source markets are highly competitive. Direct sales with local suppliers are increasing via the Internet. However the traditional distribution channels via tour operators and intermediary companies still hold a strong position for volume sales. For further information and an illustration of the range of distribution channels in these markets visit the [CBI Tourism Channels and Segments](#) website page.

**Figure 3: Information sources when making a decision about travel plans in 2012**



Source: Attitudes of Europeans Towards Tourism, Flash Eurobarometer 370, March 2013



- **Tour operators offer one of the best opportunities** to enter the wellness tourism markets in France, Germany, Italy and the UK. Although travellers in France, Italy and the UK book much of their travel online, wellness travellers still tend to book through tour operators or travel agencies.
  - In Italy for example, where online travel booking is the norm, 69% book their spa facilities through a tour operator or travel agent.
  - This behaviour is due to wellness traveller having busy jobs and not having the time to research all the holiday elements by themselves. In addition, people expect a tour operators or travel agents to provide a good level of quality and safety.
- **Niche tour operators need reliable local partners** who can help them deliver high quality tailor-made tours to their clients. They need reliable inbound tour operators, or Destination Management Companies (DMCs) to deliver activities and tours for them that are different from those offered by their competitors.
- **Trade Fairs** offer the opportunity to Tourist Boards to present a co-ordinated wellbeing destination.

#### Considerations for action

- Tour operators and DMCs should contact tour operators in their target market that specialised in wellness tourism or Latin America.
- Wellness spa hotels or resorts and providers of wellness treatments should focus both on inbound tour operators/DMCs and tour operators from France, Germany, Italy and the UK.
- Research websites of health and wellness tour operators in France, Germany, Italy and the UK to get an idea of the needs and requirements of their wellness clients.
- Encourage a co-ordinated approach to marketing between spa and wellbeing operators
  - A joint presence at Trade Fairs between wellbeing operators
  - Participate in travel agent familiarisation visits
  - Encourage journalists to visit your destination

Trade associations, trade fairs and databases can be good sources for finding specialised surfing and Latin American tour operators. Examples of such sources are:

#### Trade Associations

- British Travel Association (ABTA) <http://abta.com/go-travel/before-you-travel/find-a-member>
- The British Association of Independent Tour Operators (AITO) [www.aito.com](http://www.aito.com) has a search facility to find specialist tour operators.
- German Travel Association (DRV) [www.deuschertourismusverband.de/themen/touristische-studien](http://www.deuschertourismusverband.de/themen/touristische-studien) has reports on the German travel and tourism market including adventure travel
- French Tour Operator Association: SNAV Organisation Nationale des Professionnels du Voyage <http://snav.amadeus.fr>
- Italian Federation of Travel and Tourism Businesses Federazione Italiana Associazioni Imprese Viaggi e Turismo [www.fiavet.it](http://www.fiavet.it)

#### Trade and Consumer Shows

- BIT Borsa Internazionale del Turismo [www.bit.fieramilano.it](http://www.bit.fieramilano.it) held annually in February, in Milan, Italy
- ITB Berlin – [www.itb-berlin.de](http://www.itb-berlin.de) largest tourism trade fair in the EU market held annually in March
- Salon International du Tourisme et de Voyages - <http://www.sitvcolmar.com> - international tourism trade fair, held annually in Colmar, France in November
- Tour Nature [www.tournatur.com](http://www.tournatur.com) walking and trekking trade fair held annually in September in Dusseldorf
- World Travel Market (WTM) [www.wtmlondon.com](http://www.wtmlondon.com) the world's largest travel market, held annually in November in London.

#### Internet Research

You can also look for specialised tour operators by using search engines such as Google. To narrow your search use the domain for each country. Search domains and examples of keywords:

- **France:** [www.google.fr](http://www.google.fr) Keywords: vacances bien-être, vacances spa

- *Germany:* [www.google.de](http://www.google.de) Keywords: Wellness-Urlaub, Wellness Reiseveranstalter
- *Italy:* [www.google.it](http://www.google.it) Keywords: vacanze spa, vacanze benessere
- *UK:* [www.google.uk](http://www.google.uk) Keywords: Wellness/ spa holidays/ tour operators

For more information on market channels and segments on the EU+EFTA tourism market in general, refer to CBI's 'Market channels and segments' for tourism

- **Internet is used extensively for researching wellness holidays.** Internet penetration among travellers from France, Germany, Italy and the UK is amongst the highest in the world. Although these wellness travellers still book their holidays via travel intermediaries, especially the senior and family segments, they also increasingly research their holiday by themselves and may book some holiday elements separately on the Internet. Social media websites and websites with User Generated Content (UGC) are found to play an influential role in encouraging online booking, even among older age groups.
- **Social media networks** such as Facebook, Instagram, Pinterest and Twitters and consumer review sites, primarily TripAdvisor are overtaking word-of-mouth recommendations for the younger wellness travellers.

#### Considerations for action

- Make sure you have a professional, high-quality website with quality photos and videos and detailed product information.
- Ensure your website is well optimised in order to be picked up in Google searches. This has become increasingly technical, and Google change their search engine optimisation (SEO) criteria regularly. Unless you are very knowledgeable it is best to use a SEO specialist, as this is likely to be your most important form of marketing.
- Consider increasing awareness of your company online by using travel review websites such as [Tripadvisor](https://www.tripadvisor.com), [Travity](https://www.travity.com), [Zoover](https://www.zoover.com), and [HolidayCheck](https://www.holidaycheck.com).
- Create a trustworthy image by becoming a member of trade and wellness associations and placing the logos of these memberships and of certifications of your company on your website. Also, place testimonials and reviews to increase your trustworthiness.
- Engage visitors with social media, encourage/ incentivise reviews and feedback. This is likely to be especially valuable amongst younger age groups and active travellers.

## Market Competitiveness

Figure 4: Most important regions for Wellness tourism products and services in 2020

Therapeutic Services	Spiritual & Holistic Services	Wellness Hotels & Resort Spas	Lifestyle-based Services
<ul style="list-style-type: none"> <li>• Central &amp; Eastern Europe</li> </ul>	<ul style="list-style-type: none"> <li>• Far East</li> <li>• South East Asia</li> </ul>	<ul style="list-style-type: none"> <li>• Africa</li> <li>• Central &amp; South America</li> <li>• Middle East</li> <li>• Australia, New Zealand &amp; South Pacific</li> </ul>	<ul style="list-style-type: none"> <li>• Northern, Southern &amp; Western Europe</li> <li>• North America</li> </ul>

Source: Acorn Tourism, 4WR: Whom, Where and What? Wellness Tourism 2020

### **Destination Competiveness**

Central and South America's key assets for wellness tourism are considered to be:

- The natural environment
- Traditional & complementary treatments

Figure 4 above identifies the wellness tourism products and services that are expected to be strong in different regions by 2020. Central and South America's offer is expected to stay strong in wellness tourism as well as in leisure and recreational spas. It is expected the region will focus on Wellness Hotels and Resort Spas by 2020.

However as can be seen in Figure 4 there are several other regions competing in that sector.

To stay competitive, the following competitive factors can be considered:

- *Supporting factors and resources:* eg, ease of accessibility by air, unique cultural, historical or natural attractions, and availability of accommodations.
- *Core Wellness Resources & Attractions:* A wellness destination will be attractive if it also has unique wellness resources. This is particularly important in enabling a destination to differentiate itself from destinations with similar offers. It includes:
  - traditional, indigenous, culture-based or location-based healing
  - therapeutic or wellbeing resources
  - nature, which is also considered a core wellness resource as a natural environment also enhances travellers' wellness.
- *Wellness Destination Policy & Planning:* Specific policy and planning that promotes and supports the country, as a wellness destination is required.

### **Considerations for action**

- Evaluate your country's attractiveness as a wellness destination by giving your destination a score, ranking from 1 to 10 in the various categories. Do the same for popular wellness destinations among British, French, German and Italian wellness travellers such as India and Thailand. This will help you compare and identify your strengths and weaknesses. You can then decide which category needs the most improvement and if you are in the position to improve it. For example:
  - Work together with other wellness (tourism) stakeholders and create a spa/wellness association or cluster to serve as a platform for promoting wellness tourism.
  - Encourage the association's co-operation with the national government on industry development and promotion. Areas of focus can be education and training, regulation accreditation and quality standards, and marketing.
  - Develop a national wellness tourism website separate from the national tourism website. This can serve as an effective means of promoting and communicating your country's specialised offerings, while reaching the expanding audience of the online wellness tourism market.

For more information on market competitiveness on the EU+EFTA tourism market in general, refer to CBI's 'Market competitiveness' for tourism.

### **Useful Sources**

- European Spa Magazine - <http://www.europeanspamagazine.com> - magazine for the European wellness and spa industry. Provides updates on new product and technology trends in the spa and wellness market.
- German Wellness Association - <http://www.wellnessverband.de> - provides news, surveys, trends, and statistics related to the wellness market in Germany.
- Global Spa & Wellness Summit -

<http://www.globaspaandwellnesssummit.org> - international organisation that brings wellness leaders together in a summit. They publish several useful reports on wellness business management, marketing, and market trends.

- ISPA - <http://www.experienceispa.com> - leading professional organisation of the worldwide spa industry, comprising around 3,000 health and wellness member providers from 75 countries.
- The Spa Traveller - <http://www.thespatraveller.com> - online wellness travel magazine.
- Virtual Spa - <http://www.virtualspa.com> - professional resources for enhancing your business and career in the spa industry.

Some information is only available in the local language. You can make use of free web translation services, such as Google Translate:

<http://translate.google.com>