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Innovations in well-being tourism in the Nordic countries

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Innovation in tourism is an emerging research theme, and there is a growing understanding of the frameworks for and circumstances involving innovative activities in the sector. However, there is also a need to uncover the particularities of innovations in its sub-sectors. Based on case studies in Denmark, Finland, Iceland, Norway and Sweden, this article investigates categories of product innovation in well-being tourism that ensure modernisation and quality improvement, aligning these with developments in the still more sophisticated tourism market. The article then outlines diversifications that expand the conception of well-being. In the Nordic countries, such diversifications comprise festivals and events, season-enhancing products and products for new target groups, for example, children. Third, the importance of technology supplies for the innovation of the well-being product is demonstrated. Integrating mobile devices and interactive media is of interest to Nordic operators, although the speed of development and implementation is hampered by a range of structural and institutional barriers. A fourth category of product innovations, institutional innovations, is then discussed, comprising collaborative structures that ensure new resource constellations. In Nordic well-being tourism, commercial success in the future calls for entrepreneurial muscle and public–private sector partnerships in capacity conjunction.

Keywords: innovation; diversification; technology; institutions; Nordic countries; well-being

Introduction

When considering the increased use of the term ‘innovation’ in scholarly texts, the specification of what that term defines and how it comes about is remarkably infrequent (Hall & Williams, 2008; Hjalager, 2010; Williams & Shaw, 2011). Innovation studies tend to concentrate on strategy, addressing how and why enterprises and destinations with novel approaches to their operations are regarded as particularly advanced and successful (Bieger & Weinert, 2006; Dwyer & Edwards, 2009; Mattsson, Sundbo, & Fussing-Jensen, 2005; Novelli, Schmitz, & Spencer, 2006; Orfila-Sintes & Mattsson, 2007; Svensson, Nordin, & Flagestad, 2005). Prescriptive texts prefer to suggest managerial and governance measures for future innovation efforts in order to compensate for changes in the business environment, structural deficiencies or to repair previously insufficient focus or growth and partnership (Flagestad, 2006; Hallenga-Brink & Brezet, 2005; Nordin & Svensson,

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2007; Ottenbacher & Gnoth, 2005). Accordingly, time and again, innovation stands as a paradigmatic, sometimes even empty, *mantra*, a term without substance.

Emerging studies do, of course in their own context, fulfil an academic and applied purpose in terms of developing the conceptual frameworks and contributing to the understanding of driving forces of innovation. Weidenfeld, Williams, and Butler (2010) and Martin (2004) provide excellent, highly interesting and useful examples thereof. However, in order to enhance the understanding of the nature, content and newness of innovation, it is necessary to launch studies of explicit and manifested innovations in the industry. Recent examples include Mayer's (2009) study of the intrinsic development of the cable car in winter sports tourism. In addition, Blichfeldt (2009) canvassed a camping site using similar methods. Most recently, Rønningen (2010) addressed the role of tour operators in innovations in the SME market. Other recent examples attend to specific innovations and innovation dissemination in the hotel and restaurant sector (Enz & Siguaw, 2003; González & León, 2001; Orfila-Sintes, Crespi-Cladera, & Martínez-Ros, 2005; Ottenbacher & Gnoth, 2005; Ottenbacher & Harrington, 2007). Opening the black box of what genuinely constitutes innovation can contribute to new theoretical understandings and generalisations.

Tourism is a rapidly developing phenomenon. Treating a tourism product, service, process, etc., as a distinct innovation can arouse some concern in a research context, as this product/service/process may, very shortly after, become mainstream and trivialised to an extent that it no longer deserves the label innovative, as it is conceptualised under the term innovation dynamics in Utterback (1994). It is not often that innovations are so groundbreaking as, for example, the managerial concepts developed by the Disney theme parks (Wasko, 2001) or package tour operations launched by Thomas Cook (Brendon, 1991), both examples often referred to as radical in the sense that they challenged accepted wisdom in tourism. This article posits an attempt to comprehend the pursuit of innovation in a segment of tourism and for a shorter period of time, well-being tourism. Well-being tourism is a field of study, and the innovative activities referred to include events from the years 2008–2010 in a selected region of the Nordic countries.

This study is part of a larger Nordic research project on the development and potential branding of well-being tourism on a cross-national base. Attempting to brand and sell the Nordic countries as a well-being destination is hardly sufficient to create economic success and viable development. Continuous destination product development is essential to maintain attractiveness and competitiveness. If unique selling points are to link with higher level customer needs fulfilment, a stream of new products, new delivery methods, new marketing strategies and new organisational forms will be critical. Wellness has only marginally been included in academic innovation studies from this perspective (Krczal & Weiermair, 2006; Pechlaner & Fischer, 2006).

In this context, well-being tourism can be defined vis-à-vis wellness tourism:

Well-being is a multidimensional state of being describing the existence of positive health of body, mind and soul. Well-being is an individual issue, but is manifest only in congruence with the well-being of the surrounding environment and community.

Nordic tourism is characterised by many small enterprises, not least in areas of interest for nature-based well-being tourism (Hall, Müller, & Saarinen, 2009). In addition, in the extreme north, seasonal fluctuations are prevalent and price levels are high. Nevertheless, Nordic tourism has provided radical new tourism products, a most successful recent

example being the ‘ice hotel’ concept now found in several locations and expanding in scope and scale (Hjalager, Huijbens, Flagestad, Björk, & Nordin, 2008).

One purpose of this article is to analyse the development of competitive products and services in the field of well-being tourism enterprises under harsh climactic and economic circumstances. An innovative product or service is something that is new to the customer and/or for the producer or service provider in a particular context and, thus, an innovation does not need to relate to ground-breaking changes. An innovation might be radical in the sense that it changes the nature of the product and how it is produced, or it might be incremental, changing only smaller details, although many small amendments may add up to considerable transformations (Hall & Williams, 2008; Hjalager, 2010; Shaw & Williams, 2009).

Four interrelated aspects of well-being are the subjects of this article and include

- (1) core product/service innovations related to wellness traditions,
- (2) product diversifications which expand the notion of well-being,
- (3) technological innovation and new methods of providing services, and
- (4) institutional innovations.

As shown in Figure 1, core product/service innovations represent development within existing production and consumption logic. Product diversifications embody examples of innovations that bring nature, culture or other environmental factors into stronger focus, and combine new elements with more traditional services to generate something new or unexpected within the well-being context. The technological dimension is crucial, given Nordic high-cost business conditions, noting that suppliers are critical to success in the innovation of services (Hjalager, 2010). Finally, original institutional structures may bind suppliers, producers and consumers together under new governance mechanisms.

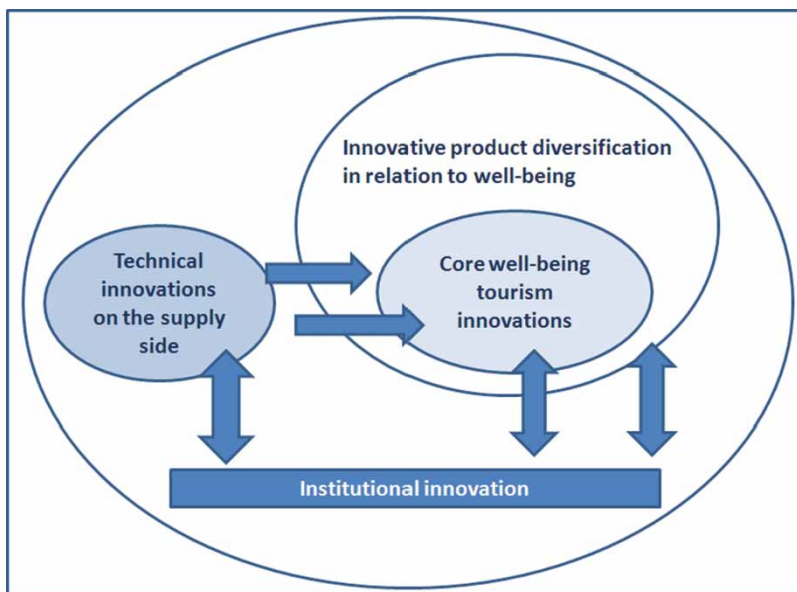


Figure 1. A conceptual model for innovations in Nordic well-being tourism.

Market-related innovations are not specifically considered in this article, as the study has a focus on supply.

Methodology

The study is organised with case investigations in so-called laboratory areas, one in each of the Nordic countries. As the term suggests, the researchers' aim was to initiate and draw on close collaboration with local actors in a multiple case study set-up. The laboratory areas served as the arenas for a systematic collection of empirical information about the well-being product and its suppliers. In practice, details in the research have to some extent been determined by local needs and wishes, as long as the major objectives of the project could be accommodated. Accordingly, the method can be characterised as a piece of 'action' research (Reason & Bradbury, 2006) with an intensive interaction, so as to accommodate for the needs of the stakeholders. The process in the laboratories areas included a variety of interventions by the research team:

- participation in and contribution to workshops and seminars,
- supporting creative experiments with evidence,
- interviews with suppliers of tourism products and services and with other actors,
- study visits to locations and enterprises with a well-being product,
- contribution to surveys and other analysis,
- discussions and consultations with board members and key stakeholders.

During the project, a total of 110 stakeholder interviews were undertaken (24 in Denmark, 26 in Finland, 20 in Iceland, 25 in Norway and 15 in Sweden). Interviewees were chosen in different ways: to some extent they were identified from documents researched related to each laboratory area, through snowballing from the first interviewees, or following the suggestions of regional developers of the area. The interviews were semi-structured with key stakeholders, such as entrepreneurs and business people, public servants, destination management organisation representatives, non-governmental organisation representatives, etc., all in one way or the other involved in the development of the case areas. The framework for the semi-structured interviews was made jointly by all researchers participating in the Nordic project.

Notes and preliminary case descriptions have been elaborated as intermediary reports for the team's collaborative use. The structure that governs the organisation of the article is the result of a double theoretical and empirical examination. Initiating with the classical Schumpeterian approach (Drejer, 2004), an attempt was made to identify product, process, managerial and market innovations in a rigorous way. However, the confrontation with the specific cases led to an amendment of the categories to better fit into the observations in the field of well-being tourism. Accordingly, the categories emerged as a more accurate description of the innovative activities in well-being tourism in the Nordic countries. This is a pragmatic solution for a case study set-up, although the weakness is a lack of opportunities for later systematic comparative studies beyond the Nordic context.

Core product and service innovations

Not surprisingly, there is a wholehearted focus on developing new products and services that meet customers' most critical needs and expectations. Much innovation in tourism is

customer and market driven (Hall & Williams, 2008), and activities in the laboratory areas decidedly confirm this tendency.

The offerings detailed below illustrate a variety of approaches and topics, despite all being close to the spa and wellness traditions. Within these traditions, water experiences are vital, and this experience entails a strong element of relaxation and pampering. It is also demonstrated that some innovations concern minor issues, details and incremental improvements.

A key issue for the advancement of traditional well-being facilities is the continuous and proactive concern for water quality, the heart of the original wellness product. The Mývatn Nature Baths in Iceland is one example. These were founded upon the steam that comes from the ground. Traditionally, the local population had made use of the hot water and steam for bathing, especially in one particular area named after the activity, Hotspring bathing hills (*Jarðbaðshólar*). In 1996, two local entrepreneurs decided to revitalise the tradition and constructed a fibre-plastic facility over one of the steam crevices. By so doing, they created a natural steam bath, and as the steam results from magma-heated surface and groundwater, it is relatively odour free, as opposed to the often distinct sulphur smell of geothermal water. The steam bath became an immediate success with the local population and word spread among tourists in the region. With demand growing, the idea of developing good service facilities was born. Two years later, a limited holdings company, Mývatn Bathing Company Ltd, was established for that purpose and six years thereafter, in 2004, the present facility was opened to visitors. This facility is only partly built around the old natural steam bath. The centrepiece of the facility is a blue thermal pool with water provided from the National Power Company's nearby energy facility. There, bore holes provide steam that propels turbines and generates electricity for local industry. Thereafter, the steam is led directly to the pool. This surplus water was being released at the roadside of ring-road number 1, which passes through the area, and was attracting a considerable tourism bathing crowd, furthering demand for facilities to be built. Analysing the marketing strategies of the present facilities and the relationship this facility has to wellness tourism presently can only be tentatively established. Under the general terms of rest and relaxation, the Mývatn Nature Baths advertises that one should come there to relax and soak in the hot water in beautiful surroundings, an 'escape from it all', in that sense. The marketing focus is not on wellness but is simply about providing a needed service, bathing, in a way which is traditional. There was a need for a year-round recreational facility in the area and prospective customers were already located in the area. As this form of bathing is traditional, and locals can get reasonably priced season tickets, their goodwill and co-operation were ensured. Apart from a stunning setting in a natural environment, the facilities at Mývatn are extremely unsophisticated and not subjects of any concerted innovation endeavour.

Another important strand of innovation is concerned with the tangible spa products. Anttolanhovi Spa in Finland is situated on the shore of Lake Saimaa in Finland and provides hotel, restaurant and rehabilitation services. A distinct concept is the 'wellness bar' (following the idea of the minibar), found in all the villas. The bars are filled with Finnish wellness and well-being cosmetic products from Lumene and Cutrin, both labels owned by LUMENE Oy. The intention is to give customers a chance to pamper themselves. Skincare products from Lumene and hair care products from Cutrin are all manufactured in Finland. In addition to the wellness bars, it is possible for customers to buy these products in the Anttolanhovi shop. Lumene was the first cosmetic business that combined berry oils in cosmetic products. The main raw materials for their products are cloudberry, blackcurrant, cranberry, blueberry, lingonberry, birch, heather and peat. All the raw materials are gathered from arctic areas; the plants and berries used thus accumulate nutrients and vitamins during the short and

intensive growing season. Studies have shown that arctic berries are rich in antioxidants, vitamins and essential fatty acids (omegas). Lumene wants their products to include at least 80% natural ingredients. The firm is also cooperating with the Finnish Association for Nature Conservation, and the Allergy and Asthma Federation, a non-profit public health organisation. Cutrin's products are designed especially for Nordic hair types. Customer feedback on the wellness bars and their high-quality products has been very positive. The manager of the Anttolanhovi hotel declares that the products of Lumene and Cutrin support the whole business concept of Anttolanhovi. The co-operation started when the hotel manager met with management of the Lumene factory and received a positive reception to the 'wellness bar' concept. After presenting the idea to Lumene, she received a proposal from Lumene as to which of their products could fit into the 'wellness bar'.

In the Swedish laboratory area, in Sweden, we observed innovation in the design of well-being tourism. The spa facility, Copperhill Mountain Lodge Åre, in Åre, Sweden, is working consistently with service design as an ingredient in their product innovation, including intangibles more intensively. The spa is designed to soothe all senses. Like many spas, it provides room for relaxation and contemplation to help one regain one's zest for life, with new energy and inspiration. The culture of the indigenous Sami people has been the inspiration for their spa concept, introducing Nature's four elements: (1) *earth/plants*: the spa is built in rustic and local materials. The colour scheme is earthy, dominated by locally sourced wood and rock, including pine and slate. The treatment rooms are designed in the style of Sami tepees, where the visitor can relax with the scent of birch oil and the sounds of traditional Sami music, 'yoiking'. All spa products are sourced from the Swedish producer, Kerstin Florian, and are based on natural resources including thermal mineral water, mud, algae, herbal extracts and essential oils. (2) *Water*: water brings life. 'Hot springs' with still water both outdoors and indoors are being built as part of the spa. (3) *Fire*: the new spa will have an open fireplace, representing warmth and love, relaxing and soothing. (4) *Sun*: natural light and sunshine floods through panoramic windows. Visitors can also step right outside of the sauna to have a roll in the snow, or relax in the new outdoor hot spring, with views of Mount Åreskutan. Open air, vast expanses and a sense of freedom are thought to characterise the experience.

The idea of wellness as a passive relaxation is challenged by the Finnish Institute of Aquatics, located in the Jyväskylä region. This facility is involved in the development of new water activities and water-related sports equipment. The institute is also in charge of educating fitness instructors for various water sport activities such as water running (with a water running belt), using submerged trampolines and aerobics training in the water. These training and aerobic forms have been developed into the following designed experiences: AquaBailamos, AquaBoxing, AquaTrim, AquaArmyInterval, AquaHappy-Feeling, AquaKickRock, AquaJogging, AquaLineDance, AquaAttack, AquaCapoeira, AquaFunk, AquaDisco, AquaHarmony and AquaPilates. New equipment to support exercising in the water has also been developed. Prototypes of new swimming exercise equipment are loaned to indoor swimming pool facilities in Finland for test use, and users and physical education instructors are asked to give feedback on them. The institute also launched a competition for customers and asked what kind of exercises one can do with the product. This resulted in many new ways to use a product and also a few suggestions for improvement. In one case, the product was slightly modified following some of the suggestions.

These examples demonstrate that core product and service innovations include various aspects of quality, and that this category of innovations alone and in its own respect incorporates many opportunities. In the sharpening of the profile, cultural elements and

inspiration from the adjoining natural resources are made an intrinsic part of the development as well (Huijbens, 2011). In order to address new and progressive needs of customers (Smith & Puczkó, 2009), the innovative endeavour includes services beyond the pampering elements. Tourism in the Nordic countries necessitates facing high labour costs. This can be seen in the range of innovative efforts noted. As a result, Nordic tourism businesses attempt to move away from products with labour-intensive elements to a greater degree of self-service, without compromising the quality of the products, services and experiences.

Product diversifications

Considering the market development (Bushell & Sheldon, 2009) in well-being tourism and intensified global competition (Cohen & Bodeker, 2008; Erfurt-Cooper & Cooper, 2009) in the field, an active diversification and expansion of the well-being product seems essential, and as shown in the figure, it allows for an innovative effort in adjunct fields. The laboratory areas studied have addressed the opportunities in various ways. Some examples are given below. The product diversifications aim at attracting new customer groups, beyond the traditional core female aged 45+ segment (Mak, Wong, & Chang, 2009; Smith & Puczkó, 2009). In a Nordic climactic and economic context, prolonging visits or extending the season is also fundamental. In addition, and very importantly, the diversifications enhance the customers' memorable experiences.

In many instances, the resources for a diversification are plentifully available in a region, but a coordinating conceptualisation and marketing are the missing links. In eastern Finland, for example, there is an effort to challenge the very passive stance of well-being and to promote the customer's more active role in her/his own well-being and health. The facilities are already in place. A conceptualisation that guides the marketing effort is based on six fundamental pillars: (1) spirit, mind and self-development: relaxing excursions in the forest and lacustrine environment; (2) health: Nordic walking exercise in the area as well as traditional and preventative treatments; (3) healthy cuisine: local raw materials and wild fish from clean waters; (4) inner and outer beauty: Finnish saunas and peat sauna treatments; (5) relaxation and comfort: swimming in the lake, the Finnish sauna experience, baths in a hot water barrel, relaxation by an open fire; and (6) tailor-made elements of movement and fitness: lake-focused guided tours, for example, kick-sledding or skating on the ice. In eastern Finland, there are packaged services and products connected to the wider theme and content of lake-related wellness which have quite successfully led to a nature-based enhancement of the understanding of well-being (Konu, Tuohino, & Komppula, 2010; Tuohino & Kangas, 2009).

A relocation can mobilise new and more diverse products. A well-being concept was elaborated and tested for families in a Danish laboratory area. The main assumption was that children and their parents spend too much time at computers and are alienated from interacting with nature for the benefit of body and mind. The four-day well-being package teaches a group to live in nature, feel the joy of moving in forests, along rivers, etc., and reframes the idea of healthy eating. The liberation of the fantasy from the restriction of electronic media is a key element, and the families get tools to continue a healthier lifestyle and to enjoy social relationships with each other to a greater extent. The planning group, which consisted of personnel at a sports centre and two hotels, tried to invent and implement new accommodation forms for this category of tourists, namely spectacular and exciting tree-top houses. Constructing buildings in a protected forest environment, however primitive, raises discussions with the authorities in charge of nature conservation, and poses a challenge to accommodate both sustainability and tourism experiences.

Åre in Sweden is recognised for a continuous development and diversification of its products and services in order to expand, attract customers and broaden the tourist season. Recently it has developed the largest zipline park in Europe. Zipline is a ropeway where visitors are strapped in on a harness, swishing above the beautiful natural landscape of Åreskutan and its wild terrain. It provides the participant with a feeling of flying. The participant is elevated 60 m above the ground and the line is several hundred metres long, reaching speeds of up to 70 km/h. Included in the Zipline is an Ecotour. The meaning of Ecotour is that the guides share their knowledge on the environment, flora and fauna and history of Åre. Hence, the Zipline offers a combination of excitement, beautiful scenery and education in natural science. Zipline was Åre's first outdoor activity to be open year-round.

In an attempt to diversify into other sectors of the economy, the organisation, Sauna from Finland, included ideas about the development of entire sauna villages and a sauna museum, thus enhancing the historical and cultural elements of their product and service offer. Sauna is already a theme for local festivals and competitions in Finland.

Expanding both the customer base and the reputation for social responsibility, the Swedish non-profit organisation, Totalskidskolan, is in itself not new but providing a unique offering, from its base in Åre. Totalskidskolan is a ski school that welcomes skiers with a permanent disability – visual, physical, severe, complex or learning. The underlying assumption is that skiing is for everyone. Anyone who has an interest will be provided with the opportunity to experience the speed, snow, mountain environment, joy and excitement of skiing. The organisation arranges ski camps for children, youth weeks and ski school weekdays during the winter season. As a social benefit, using the highly adapted and specially developed equipment does not affect the price. Totalskidskolan subsidises the costs of specialised equipment.

The rhetoric of well-being is being expanded greatly, and the examples above show that a business diversification takes place in order to approach new customer groups, all seasons and a much broader range of experiences. Consolidated business in a Nordic context requires a focus on the diversification due to market and climatic circumstances. A next more sophisticated step in this direction, initiated by individuals in the Beitostølen area in Norway, aims at a stronger synchronisation with the health and medical sector. In spite of the fact that the Nordic countries are well equipped with advanced medical institutions, efficient and promising diversification has taken place only in smaller fragments of the market, for example, in sports health. As is explained further below, there are institutional barriers to innovations that require an interaction between the primarily commercial well-being sector and the conventional, publicly controlled medical sector.

Technological innovation and new methods of providing services

In a Nordic context the technology dimension is essential due to high labour costs, and that also accounts for well-being tourism. Some well-being can be pursued without a 'high touch' element. Process innovation includes the introduction of new technologies that can lead to more rational service provision and/or new services. Enterprises in the laboratory areas work on this. However, these facilities are mainly in the development or test phases. Already they attract significant interest, and they are pointers to an emerging area of operation for well-being tourism.

In the Jyväskylä region in Finland, a technology business called FirstBeat is providing products and services for monitoring health and well-being. FirstBeat cooperates with the Finnish heart rate monitor manufacturer, Suunto. With the help of the software, it is

possible to assess physical workload, daily stress and recovery, the health promoting effects of physical activity, effectiveness of fitness training, and energy expenditure and weight management. The stress monitoring has also been tested in tourism settings in Jyväskylä.

Advanced technologies are moving rapidly into the sports, leisure and rehabilitation sectors. In well-being tourism, implementation is still fairly modest. However, new forms are under consideration. In the Danish laboratory area, there has been some focus on the rehabilitation needs of patients who have been under medical treatment due to, for example, knee or hip surgery. Training is necessary not only to regain health but, as is now the case, to regain fitness. Pleasant environments can increase the efficiency and dedication devoted to such efforts. Persons under rehabilitation can use trails in nature or facilities in wellness centres, closely monitored by modern technologies. Technology can assist in communication with medical staff. In addition, technological assistance can empower users and provide them with a better understanding and control over their rehabilitation. Specifically, smartphones are frameworks for many new applications that help and motivate patients. At this time, the support of professional medical organisations is the most difficult obstacle to planning and implementation.

The technology related to sensors in human environments is an example of another area of product innovation. Sensors can be applied for many purposes. Vuokatin Aateli in Finland concentrates on offering high-quality sensors to accommodate villas and apartments. The company is using the latest technology in its luxury villas. This includes carbon dioxide measuring devices in order to automatically modify the air-conditioning of different rooms to keep the oxygen level optimal for guests. Apartments and villas are also monitored remotely. The manager located elsewhere can help if the customer has problems with some equipment. In addition, the system will alert management if a guest has forgotten to turn off the water before leaving or if a window has been left open in winter. Such systems help the proprietor to monitor the accommodations and keep them in good shape for future guests.

Technology is also being used to track tourist visitors with the purpose of understanding their behaviour, and providing adapted offers. In the destination of Åre, for example, technology has been used not only to access information on tourists' movements during winter sports but also to find out more about the people visiting the traditional ski resort in the snow-free seasons. GPS signalling devices indicate where the visitors spend their time. The development also aimed at new concepts and product development with input and ratings from customers.

Specialised technology providers are moving into the well-being arena, and new strategic alliances of crucial importance for the innovation of products and services are emerging. It appears that mainly larger enterprises, for example, in Åre, seem to possess the receptive capacity for new technology as well as the competencies needed to launch into development co-operation with external specialists. Being dominated by smaller enterprises, it is questionable whether the Nordic countries, in general, can ensure competitive advantages in this field unless subsidised by institutional innovators and their investors.

Institutional innovations

Institutional innovations are concerned with creating new modes of collaboration and establishing organisations and procedures not hitherto seen. The aim of institutional innovation is to reap benefits – economic benefits, in terms of visitors, spin-off effects, etc. – which could not be harvested by single stakeholders acting alone. Institutional innovations are

often about bridging sectoral barriers or linking mental frameworks and pooling resources in new ways, as well as regulating this collaboration.

Networking and co-operation between different business sectors is evolving in 'Sauna from Finland'. This concept aims at creating new types of business activity in Finland and simultaneously profiling Central Finland as the 'Sauna Province'. Sauna from Finland started as a network of business efforts. Co-operation strengthened between the different actors, leading to the establishment of an association around the concept. The goal of the association is to promote Finnish sauna culture, support the development of services connected to sauna activity, and support and inspire new entrepreneurial activities. The concept aims at bringing together actors from different business sectors (e.g. the sauna industry, tourism, wellness/well-being and the service sector) to create new types of business activity. Stakeholders in the area emphasise the sauna manufacturers and their important role. For instance, the sauna stove manufacturer, Harvia, has its production facilities in the area. Hence, Sauna from Finland is moving towards a clustering.

Well-being is most often considered to be a leisure-related phenomenon. However, work stress is a serious problem for many employees and, as a consequence, also for their employers. Combating the problem by providing new and attractive services is an idea in the portfolio of the Danish laboratory area. Professionals in stress handling claim that it is necessary to create a complete 'time-out', away from home and everyday tasks and obligations. Many accommodation facilities are ready to offer premises away from home. However, to appear as a well-being product, it also includes a coordinated and flexible selection of stress therapies and life coaching, gentle forms of exercise in natural surroundings and healthy food. Personal services such as therapy are expensive, and many people do not feel that they can afford an extensive well-being break, no matter how much they need it. Therefore, the actors in the laboratory area attempt to collaborate with insurance companies, large workplaces and public authorities in order to share and mitigate costs.

Cross-sector innovative collaboration in the area of well-being tourism is taking place between spa hotels and retail shops in the following laboratory example. The Comwell Hotel chain has hotels in Denmark and Sweden, three of which offer extensive spa facilities. In 2009, the chain collaborated with a producer of skincare products, and the result is a series of products used by the hotels including body lotion, body oil and body cleansing foam. Natural ingredients include avocado and hibiscus extracts. The collaborative partner is Matas, a retail chain with more than 200 shops in Denmark and Sweden. The products have been given a signature name, Spalosophy, and are used in the treatments in the Comwell hotels' spas. The products are also sold in all hotels in the chain and in the Matas shops. It is claimed to be very important that Matas matches Comwell in terms of geographical coverage and in perceived quality of product while remaining affordable. It is particularly emphasised that the products do not contain phthalates, parabens or any allergy-provoking perfumes, consistent with the Matas company image as a retail chain for all Danes, popular for 'no nonsense', honesty and reasonable prices. The product series is featured on Comwell's website, where Matas is also mentioned. The Comwell name appears on the bottles, while there is no direct link to the hotel chain at the Matas website. The CEO of Comwell was astonished at the rapid success of this initiative. Jointly, the partners had estimated a sale of 5000 units during the first three months of introduction, but for that period, the products sold 75,000 units in the spas and Matas shops. They found it to be a 'splendid marketing' initiative. Comwell has mounted a follow-up initiative by publishing a small handbook entitled 'Spa at home', which describes simple ways to continue to enjoy a spa experience after having visited a Comwell facility.

The handbook is also part of the marketing of Comwell and Matas' cosmeceuticals. Attention to the potential of cosmeceuticals has increased as a consequence of the collaboration. Comwell would welcome an expansion of the Spalosophy series and increased use of Danish ingredients.

Well-being concepts and related business development is also about the development of regions and communities. That is taken into account in Åre's Vision 2011. A long process of informal meetings with the most influential (self-appointed) actors in the destination resulted in the Vision 2011 strategy. This strategic plan states where the destination is heading and what it aims to become. The Vision 2011 constellation is a rather untraditional way of organising public–private co-operation at a destination. Focusing on the role of local government, it is even more remarkable. For a publicly led effort, it is unusual to see that the effort is quite informal, and yet includes a very influential group of private business parties. A minimum of formal records are kept, which may indicate a lack of democratic transparency. However, the public actors' part of the Vision 2011 group has approached a manner of organising and working that appears to be readily accepted and common among these private actors. The boundary between the public and private sectors also appears to be increasingly blurred with regard to policymaking and in particular to a destination which is embracing initiatives and strategies. For example, after the local government decided to financially support the establishment of an arena, event and assembly hall at the privately owned Holiday Club with €5.3 million, it was naturally criticised because the expenditure could affect more traditional public investments, for instance, in schools and health care. The local government also provided land and infrastructure. However, it is clear that a project of this size could hardly have been successfully carried out without this kind of joint approach and the innovative efforts of the local government. This form of destination governance can be described as process innovation. The public–private partnership, with its informal yet highly influential character, with certain known rules of the game and an exchange of resources, such as information and the knowledge to negotiate shared purposes and arrive at a shared view of the future, certainly has innovative elements and structures. It was also essential to the successful development of various well-being concepts across seasons.

The institutional innovations mentioned here aim at a re-channelling and productive re-composition of resources across organisations, including in the areas of competencies, financial flows, purchasing power and supportive publicity. The relevant actors in the Nordic countries have readily found areas of institutional innovation, particularly those which will better link together hitherto separate commercial sectors. It has become evident, however, from studies in the Nordic countries that the otherwise powerful welfare state and public sector maintain a marginal role in the development of the Nordic well-being product (Hjalager, 2005). It is not likely that, in a Nordic context, there will be an amalgamation of the traditional health sector and the tourism-related well-being phenomenon (Kelly & Smith, 2009). Yet there are several ways to facilitate positive spillovers. One driving force is the fact that lifestyle diseases are threats to the feasibility of publicly financed health services, and therefore a broader perspective on what contributes to good health is required.

Conclusion and discussion

The work in the laboratory areas noted generally shows considerable creative power and ability, as the examples exhibit. The stakeholders are, for the most part, inclined to innovate, and they are ready to collaborate with others to achieve results. However, when taking into

account the customers' needs and profiles and the characteristics of the unique selling points in the Nordic countries, there are still areas of interest for future development. The interviews with both commercial and public sector actors in the laboratory areas point to a range of future developments as innovation challenges, and the analysis of the previous trajectories underline the need for a more ample and inclusive strategic approach. Among these, are the following:

Re-inventing local well-being traditions as part of a core strategy. The sauna tradition, cross-country skiing and bathing in hot springs and lakes are examples of traditions that have been translated into genuine tourism well-being products. Other traditions can be considered as possibilities for development. Reinvention does not necessarily mean creating an exact copy of another successful venture; in most cases, it is necessary to further develop plans which will accommodate the practical performance of the venture, to create an aura and interest in the phenomena and to ensure business opportunities for those who provide facilities and services.

Product diversification in traditional wellness facilities. Many facilities are focused on traditional wellness, for example, the hotel spas and thermal baths. For them, it is crucial to expand the offering. Co-operation with outside actors can enhance well-being in nature, for example, on horseback, on skis, on hiking, walking or guided nature interpretation tours. The products might also be widened to more therapeutic and semi-medical specialities. The borders of individual service offerings and destinations in general are blurring, presenting both a challenge and an opportunity for product development.

Developing well-being concepts for children as part of a diversification strategy. Children are the future consumers of wellness and well-being. Their interest in well-being and health concepts must be kindled early. At the same time, their approach to 'body and mind' is different, and products need to be rearticulated and remodelled, with active elements, and with collaboration with parents and relationship building with others.

Integrating products from nature into the experience more intensively as part of a wider diversification. There is a long list of herbs and plants which could be used more intensively in wellness treatments, and the list of food products is also very extensive, although research in ethno-botany is lacking in the Nordic countries. More profoundly, vast wilderness areas and non-anthropogenic landscape vistas can facilitate a sense of wholeness and oneness with nature so important to many urban dwellers today. Furthermore, nature provides building materials, and materials for a range of designer gifts and home decorations. The experience of well-being takes place through the consumption, for example, of experiences, treatments or foods, and the interpretation of Nordic values can also be attached to many local products.

Boosting the use of technology for all purposes. Labour is the most costly element in the production of tourism services and experiences in the Nordic countries. There is a great incentive for enterprises to increase productivity by all available means. The use of technologies for all purposes is essential. Backstage technologies, such as the use of IT in booking, management, communication and control, are crucial. However, increasingly, technologies go hand-in-hand with improved services. Thus, smartphone and iPad applications help users of well-being services with access to supplementary information. These and other devices also enhance the core well-being products, for example, by providing personally adapted continuous

measurement and treatment of health-related data. Tailored well-being programmes and schedules are emerging. Increased collaboration between IT providers and health and tourism actors can promote further development with wider economic benefits.

Stimulating curiosity and learning, which require new institutional features. Some tourists are not looking for pampering alone; they want to better understand the destination and its characteristics. This can involve developing resources, for example, through websites, brochures, books, TV programmes and smartphone applications, all providing specificity about the well-being service offer. Such resources should embed narrative, or storytelling, at the human resources contact stage. As illustrated, some Nordic-lived values are unspecific, and their practice is tacit. There is thus also a need for translation of work and recreation practices and behaviours for both formal and informal hosts.

Mapping and marketing well-being resources through the Nordic landscapes, also with institutional renewal. Well-being trails can be a product organisation that combines many resources: spots for silence, places of spiritual power, areas with health-giving plants or archaeological significance, locations offering opportunities for various forms of physical activity and of course the traditional commercial offerings such as spas, accommodations and healthy food restaurants.

Enhancing medically related offers with the invitation of service institutions. Population ageing leads to an increase in demand for wellness products and services with certified medical profiles. The Nordic countries enjoy a high standard in medical services which are widely available to Nordic citizens as part of the benefits of the welfare state. There tends to be a very rigid separation between well-being and health services. It is a challenge to create new understandings of scientifically tested and approved well-being measures that enhance the effects of medical services or serve as preventive measures.

Creating well-being events with wider institutional range. The possibilities for inventing exciting, entertaining and interesting events in relation to well-being have hardly reached a viable level. Health and wellness exhibitions may, for example, bring out both touristic products and other types of products and services. Festivals can focus on healthy food and eating. Hands-on events having to do with cosmetics and cosmeceuticals attract both children and adults and may attract new user groups. Competitions can activate larger groups, for example, in terms of weight loss programmes. Further, in terms of learning, courses, seminars and workshops can be organised. These, linking up with transcendence motives, can foster future events with the aim of creating new binding social relations to local areas and populations. There is, generally, a need to develop the ideas, management and enhancement of well-being events.

Enhancing the ethos. Ethos refers to the overarching Nordic traditions and their lived values as well as the behavioural and interpretative codex in Nordic society. There is a desire and need for tourism enterprises and actors to be outspoken about what is important. Ways in which the Nordic people define their cultural ethos can be incorporated into well-being tourism offers in order to boost the unique selling points of the Nordic countries. This requires greater emphasis.

Areas for the future crafting and reinventions mentioned in this article are characterised by a strong focus on Nordic preconditions, and particular strengths and opportunities. As shown, opportunities exist both in terms of further innovation of the core products, in

diversifications, with the inclusion of technology, and in terms of institutional changes and reformatting – and in combinations hereof. Thus, competitiveness will hardly be achieved by merely imitating wellness and well-being tourism efforts observed in other countries, such as otherwise well-known and highly professional Alpine wellness and well-being tourism products (Pechlaner & Fischer, 2006; Smith & Puczkó, 2009). The Nordic approach will benefit from choosing other directions, directions which include people (Gelter, 2000; Liburd & Derksen, 2009), technology and nature (Müller & Jansson, 2007). In addition, given the burgeoning problem of lifestyle-related diseases a shift in focus on behalf of public sector authorities seems to be underway (García-Altés, 2005; Nahrstedt, 2004). Synergies can thus be created with those offering well-being services catering to people's need to balance their lifestyles in harmony with their perceived well-being. Therein lie the fundamental opportunities to develop a Nordic well-being concept that can be beneficial for tourism enterprises in the region. Future studies will be needed to follow up on the specific progress of Nordic well-being tourism and the product and services provided. Utterback's (1994) theoretical framework of the intrinsic dynamics may be a base for longitudinal studies that can explain why some concepts have the potential of survival and others have not.

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