



Wellness Tourism Worldwide

Improving Well-being
& Economic Growth
through Travel

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

Full Research Report

In cooperation with the Hungarian National Tourism Plc.



HUNGARY

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4WR: Wellness for Whom, Where and What

Wellness Tourism 2020

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4WR: Wellness for Whom, Where and What

Wellness Tourism 2020

Wellness Tourism Worldwide (WTW)

Mission Improving Well-being & Economic Growth through Travel

Description Wellness Tourism Worldwide is an international trade alliance comprised of wellness and tourism related businesses, organizations and institutions. Founded in recognition of the wide gap between health, well-being, leisure, tourism and sustainability, WTW is based on the domains of well-being and Quality of Life (QoL).

We bring together key stakeholders from across countries, regions and sectors who share the collective goal of accelerating wellness tourism growth. Key stakeholders in Wellness Tourism include:

- Government agencies (ministries of tourism, ministries of economic development)
- Tourism organizations and related businesses (destination management organizations, associations, travel agents, MICE, hotels, airlines, spas)
- Corporate entities focused on employee well-being (corporations, insurance groups)
- Health providers and fitness related businesses,
- Companies and organizations focused on sustainability,
- Higher educational institutions offering wellness and well-being programs, and other interested parties

Services: Research, Education, Development and Promotion

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Founders

Camille Hoheb, M.S. (USA)

Camille Hoheb has performed strategic planning and directed both operations and marketing to the healthcare and wellness industries for twenty years. Her career has spanned-and-linked physicians, hospitals, medical spas and wellness destinations worldwide. She developed 100+ medical spas nationwide, held executive positions with several spa companies. Prior, Ms. Hoheb specialized in hospital development for ten years where she managed a hospital-based wellness center, and developed business and marketing plans which increasing inpatient and out patient volume. She was responsible for public relations, physician relations, community outreach and health promotion. Later, Ms. Hoheb was charged with developing health tourism and increasing executive health business for the only medical and wellness institute within a 5 star luxury hotel brand.

After earning from the National Institute of Health her Master's degree in Health Care Administration, Ms. Hoheb received certifications in Integrative Medicine, Complementary and Alternative Medicine and Health and Spirituality from the National Institute of Health. She also holds a California license in real estate.

Having authored many articles on health and wellness tourism, integrative health, spa reviews, spa operations and corporate health, Ms. Hoheb has also been quoted in a wide variety of publications including the TTRA, Travel Market Report, Wall Street Journal, Medical Tourism Magazine and Beauty Confidential. Her articles have appeared in UK, Turkish, Romanian and French publications and magazines in the U.S. including American Spa, Day Spa Magazine, Yoga Journal, Massage Therapy Journal, Massage & Bodywork, Healthy Aging, Health Tourism Magazine, Medical Tourism Magazine, Dermascope, Skin, Inc and Les Nouvelle Esthetique and Spa.

Formerly serving on the Advisory Boards of Health Tourism Magazine, Corporate Health and Wellness Magazine, Ms. Hoheb is also a member of Professionals in Human Resources Association. She chaired the first Spa & Wellness tract of the Medical Tourism and Global Health Congress, which spanned two days and 10 sessions. Ms. Hoheb is a member of the Global Spa Summit Community; an invitation only, internationally recognized conference shaping the global spa industry.

Ms. Hoheb has presented in Asia, Europe, North America and the Middle East with a broad range of topics ranging "North American Consumers: Opportunities in Health and Wellness Tourism, "Vacations:Impact on Health, Productivity and Happiness" and "The Future of Thermal Tourism – A Global Perspective" to "Synergy Between Spa and Medical Tourism", "Spas and Corporate Wellness" to "Corporate Wellness and Health Tourism". Ms. Hoheb also speaks on topics which bridge the gap between spa, wellness, health and tourism industries.



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László Puczkó, PhD MSc MA CMC Co-Founder (Hungary)

Dr. László Puczkó is a managing director and head of tourism section at Xellum management consulting company and an international speaker. He graduated in Business Administration at the Budapest University of Economic Sciences in 1993. He holds a Masters degree in Art & Design Management from the Hungarian Academy of Arts and Crafts, a PhD from Budapest University of Economics and Public Administration and is a Certified Management Consultant.

He is president of the Association of Tourism Consultants (Hungary), Guest Professor at Parnü Kolledz (University of Tartu, Estonia) and HAAGA-HELIA University of Applied Sciences (Finland) and was a Member of the Travel and Tourism Research Association Europe Chapter Board. Dr. Puczkó is a member of the Global Spa Summit Community; an invitation only, internationally recognized conference shaping the global spa industry.

His main areas of expertise are laid in tourism research, strategy preparation, planning and management in the following areas: health/wellness/spa tourism, heritage and cultural tourism, national/regional/local planning, product and project development and experience mapping and enhancement.

In the recent years Dr. Puczkó has been involved in many development projects aiming at thermal bath developments, both at regional, local and site level. His work included conceptualization, financial and market feasibility and marketing planning.

During his career, in the area of tourism research Dr. Puczkó has organised and performed a series of primary research projects focusing on perception, marketing, attraction management and impacts of tourism both in Central European Countries and globally. Based on his works several market analyses have been prepared focusing on the characteristics of health tourism, theme parks and thematic routes, heritage tourism, attraction and visitor management, and impact analysis. He has been involved in over 100 advisory projects.

Besides his advisory work, he has been a visiting lecturer at various higher educational organizations, both in Hungary and in other countries.

Former positions: researcher, and lecturer at the Tourism Research Centre of Budapest University of Economics and Public Administration (1993-2001), manager at KPMG Advisory Travel, Leisure and Tourism Group (2001-2004).

He is a co-author of professional books on health and wellness tourism, the impacts of tourism, visitor management and tourism management in historic cities and has been interviewed by many international professional and consumer journals and magazines.



4WR: Wellness for Whom, Where and What? - Full Report

The *4WR: Wellness for Whom, Where and What? Wellness Travel 2020 Full Report* is a research report presenting the biggest **opportunities in wellness tourism** (including international and domestic travel) over the next 10 years. 4WR collected information from 140 visionaries representing stakeholders from wellness, tourism, spa and healthcare industries in over 50 countries worldwide.

Wellness tourism is one of the fastest growing forms of international and domestic tourism. This trend is not expected to change in the coming 5-10 years. There is one major risk, however: the globalization of standardized and uniform products and services. **Key findings of the 4WR Full Report help developers, managers and policy makers and others vested in wellness tourism build on or develop individual competitive advantages and as importantly, avoid costly common mistakes.** The report exposes the biggest **opportunities** over the next 10 years, to better define new product development strategies.

Use the report to aid in strategic planning, development & promotion. 4WR: Full Report can support your decision-making, risk planning and policy formulation, by answering questions such as:

- Which wellness tourism products and services will become popular over the next 10 years by the following geographical regions: Northern-, Western-, Southern-, Central & Eastern Europe; North-, West-, South-, Central America; Africa; Middle-East; South East Asia; Far East; Australia, New Zealand & South Pacific
- Which wellness tourism products and services will decline in the next 10 years by the following geographical regions: Northern-, Western-, Southern-, Central & Eastern Europe; North-, West-, South-, Central America; Africa; Middle-East; South East Asia; Far East; Australia, New Zealand & South Pacific
- Which wellness tourism products and services are not well known yet still present an opportunity for market growth?
- What are the strengths, weaknesses, threats and opportunities for developers, policy makers and operators?
- What are the key recommendations for industry and organizations facing a dilemma regarding their underutilized, low-performing services
- What are the market segments' (out of men, Gen Y, families, singles) 10 most utilized wellness tourism products and services)?
- Learn about the four types of funding for wellness tourism.



Health, Wellness, Well-being & Travel

Health-enhancing practices date back to ancient times, for example:

- Indian Ayurvedic practices go back as far as 5000BC.
- The earliest known writings about Chinese medicine go back to 1000BC.
- The earliest reference to healing waters is about 1700 BC. Hippocrates, the classic philosopher and physician of the Hellenistic age, and a prophet of natural healing methods, said: '...water is still, after all, the best'.
- The word 'spa' is thought maybe to have originated from Latin and phrases such as 'sanitas per aqua'. Greeks and Romans focused on both cleanliness and fitness and understood the health benefits of various types of water treatments.
- The ancient civilisations of Asia and the Middle East and indigenous peoples all over the world have been aware of the benefits of massage, yoga, meditation, herbal medicines, and other forms of healing and spiritual practice for many more centuries than in Europe.

In the modern era, one of the most widely-accepted **definitions of health** is that of the World Health Organization (WHO, 1948), which stated that

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

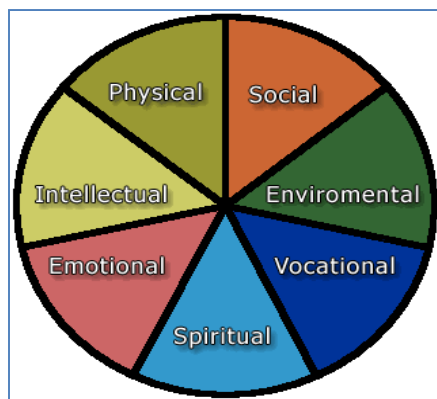
However, since 1948, the WHO has broadened its definition further to include physical and mental health and broader issues of wellness and lifestyle management. So the definition of health becomes:

The extent to which an individual or a group is able to realize aspirations and satisfy needs, and to change or cope with the environment. Health is a resource for everyday life, not the objective of living; it is a positive concept, emphasizing social and personal resources as well as physical capabilities. (WHO, 1984)

This definition corresponds much more closely to what is commonly becoming known as **wellness**. Where did the term wellness come from originally? In the 1950s, Herbert L. Dunn, an US physician was a biostatistician who observed that as life expectancy increased; patients were more at risk from lifestyle factors than at risk for contagious diseases. This observation was the impetus for coining the word wellness in opposition to the term illness. Dunn's idea of wellness included physical, social and spiritual well-being. It wasn't until 20 year later that the modern concept of wellness and John Travis emphasized the need for individuals to take responsibility over their own health. The term wellness originates from the combination of well-being and wholeness, addresses human health in a holistic or comprehensive sense and assumes that each person will actively participate in protecting their health, in preventing diseases and will not leave all this to medication.

However, it is important to note that there are different historic, cultural, and linguistic understandings of health and wellness. Interestingly, wellness has been an English word for a long time, although it was rarely used and seemed rather archaic until the 1950s.

In some languages (e.g. Finnish, Hebrew) there is no word for 'wellness', and it is merely translated as 'health' or 'well-being'. The German word 'Wohlbefinden' has the exact translation of 'well-being', whereas 'Wohlfühlen' means 'well-feeling'. The word has now immigrated to Italy and has been integrated into the Italian language when 'benessere' is a word denoting the meaning of 'well-being'. Even dictionaries vary. For example, wellness in the dictionary.com does not bear any resemblance to the official entry in the Oxford English Dictionary, which defines satisfaction as *"fulfilment of one's wishes, expectations, or needs, or the pleasure derived from this"*.



Here, we should briefly make a distinction between **wellness, satisfaction, well-being, happiness and quality of life**. Terminology can be somewhat confusing as wellness, well-being, health and other similar terms are often used interchangeably. It could be argued that happiness takes this a stage further, although it is perhaps a more temporary state of emotion. Considerable research is now devoted to producing global indices of happiness for numerous countries (e.g. Bhutan). Happiness seems to be about creating a fulfilling and meaningful life through the right conditions (e.g. love, attachment, engagement, flow).

The New Economics Foundation (2004) makes a distinction between happiness and well-being as follows:

Well-being is more than just happiness. As well as feeling satisfied and happy, well-being means developing as a person, being fulfilled, and making a contribution to the community.

This definition takes us beyond the transformation of the individual through self-development and personal fulfilment towards a sense of social responsibility. **The concept of wellness** takes this idea even further and includes domains such as physical, mental and spiritual health, self-responsibility, social harmony, environmental sensitivity, intellectual development, emotional well-being, and occupational satisfaction (Müller & Kaufmann, 2000; The National Wellness Institute, 2007). Quality of Life is arguably even broader and more complex, combining both objective and subjective elements, for example health, standard of living and well-being (e.g. Cummins, 1997). There are two focal concerns of wellness:

Wellness is a state of health which comprises an overall sense of well-being and sees a person as consisting of body, mind and spirit. Lifestyle and self-responsibility for health are paramount in the quest for a better quality of life. Wellness is the optimal state of health of individuals and groups.

- The realization of the fullest potential of an individual physically, psychologically, socially, spiritually and economically.
- The fulfilment of one's role expectations in the family, community, place of worship, workplace and other settings long-term.



Wellness Tourism Worldwide subscribes to the notion that wellness is more than a spa or a physical orientation (e.g. fitness). WTW is based on the domains of wellness and quality of life indicators. This approach addresses human health in a comprehensive manner and assumes that individuals will actively participate in protecting their health and in preventing diseases.

The wellness industry encompasses everything from spa, food and nutrition, complementary and alternative medicine, to active-aging, and fitness, to workplace wellness, medical and wellness tourism. With regards to **tourism**, spa and wellness tourism are often considered synonymous and the same can be said of medical and health tourism. Yet all four have unique and different meanings and are manifested in various ways around the world.

Travel for Health

Travel can make us happier three ways: 1) with the anticipation and planning of the trip 2) enjoying the vacation 3) relishing the memories that often last a lifetime. Tourism can enhance our well-being and quality of life, especially if we do it regularly enough, and we may even experience moments of joy. Research studies suggest that going on trips can affect meaningful change, increase work productivity and as importantly, improve health by enhancing sleep and remarkably, decreased the incident of heart disease. These benefits can be enhanced significantly if we engage in health or wellness tourism specifically. That is to say, we travel with the explicit aim or principle motivation of improving our physical and mental condition. This can include improving emotional well-being, such as stress reduction and calming the mind, as well as healing or rejuvenating the body.

By 2000 health motivated travel became very popular and we could observe the proliferation of approaches and services and many countries, destination and operators (re)entering the health tourism scene. Wellness Tourism Worldwide has mapped out the recent situation as well as the expected changes in the coming 10 years. We developed a **Global Health Tourism Service Grid** in which we introduce the inter- and intra-relationships of the key services and approaches in the spectrum that extends between medical and wellness services. The Global Health Tourism Service Grid aims at summarizing the most important types of services and assets. Not only umbrella terms, such as wellness or health can mean different things in different countries. Other globally used terms, such as spa also refers to different concepts. For example in the U.S. spa composition is focused on day spas with a small percentage of hotel spa and spa destinations while the European market has a much different orientation towards composition, services and consumer orientation. In Europe the focus is on spa/baths. Countries with significant thermal water resources mainly refer to baths, whereas on most countries customers would look for pampering and beauty when visiting a spa (i.e. top spa services in the US are massage and salon services).

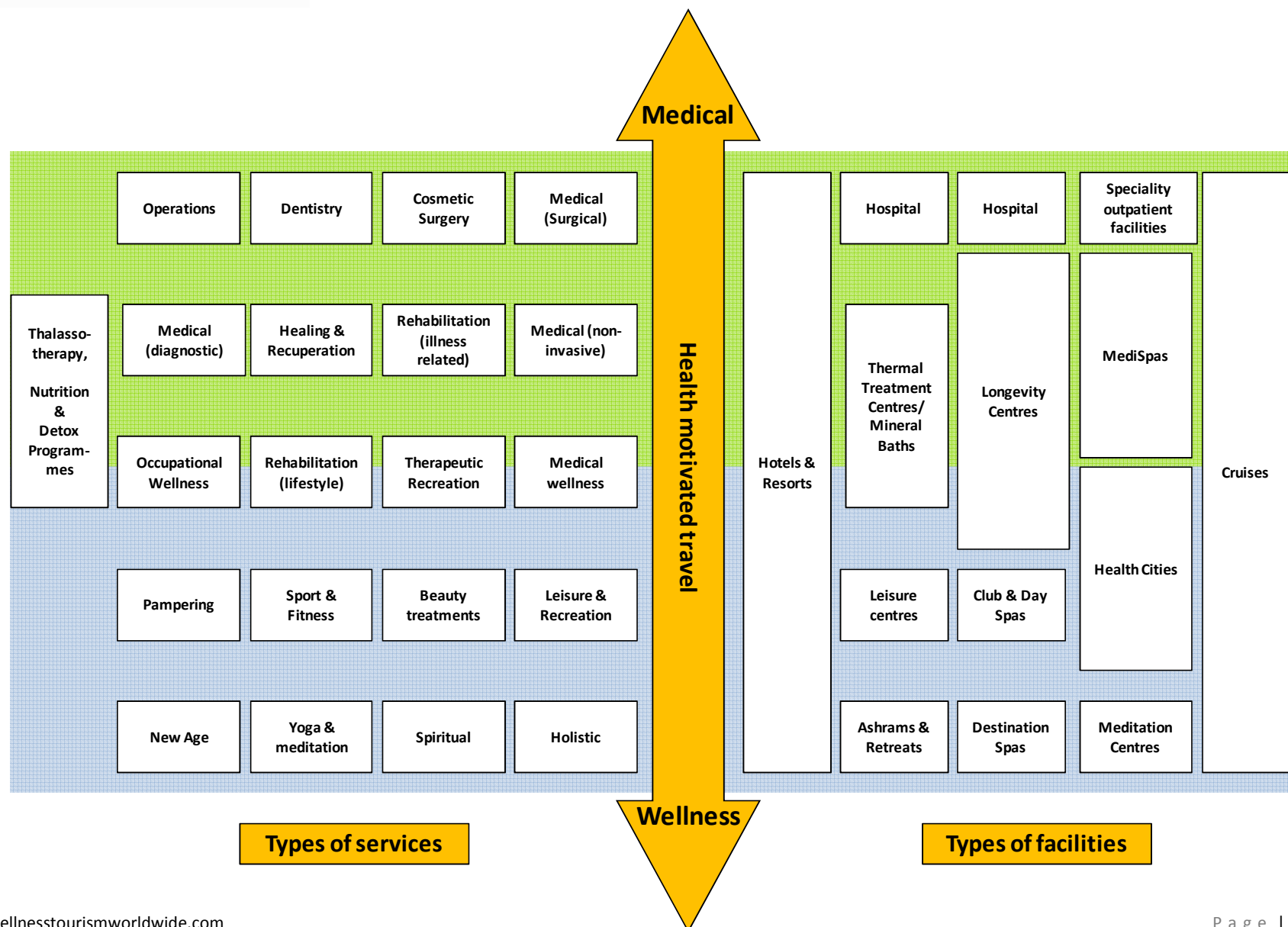
Wellness Tourism Worldwide understands that health motivated travel ranges from travelling for invasive treatments (operations) to travelling to participate in a spiritual activity. The spectrum is extremely wide and we observe a constant proliferation of services and products.



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4WR: *Wellness for Whom, Where and What*

Wellness Tourism 2020





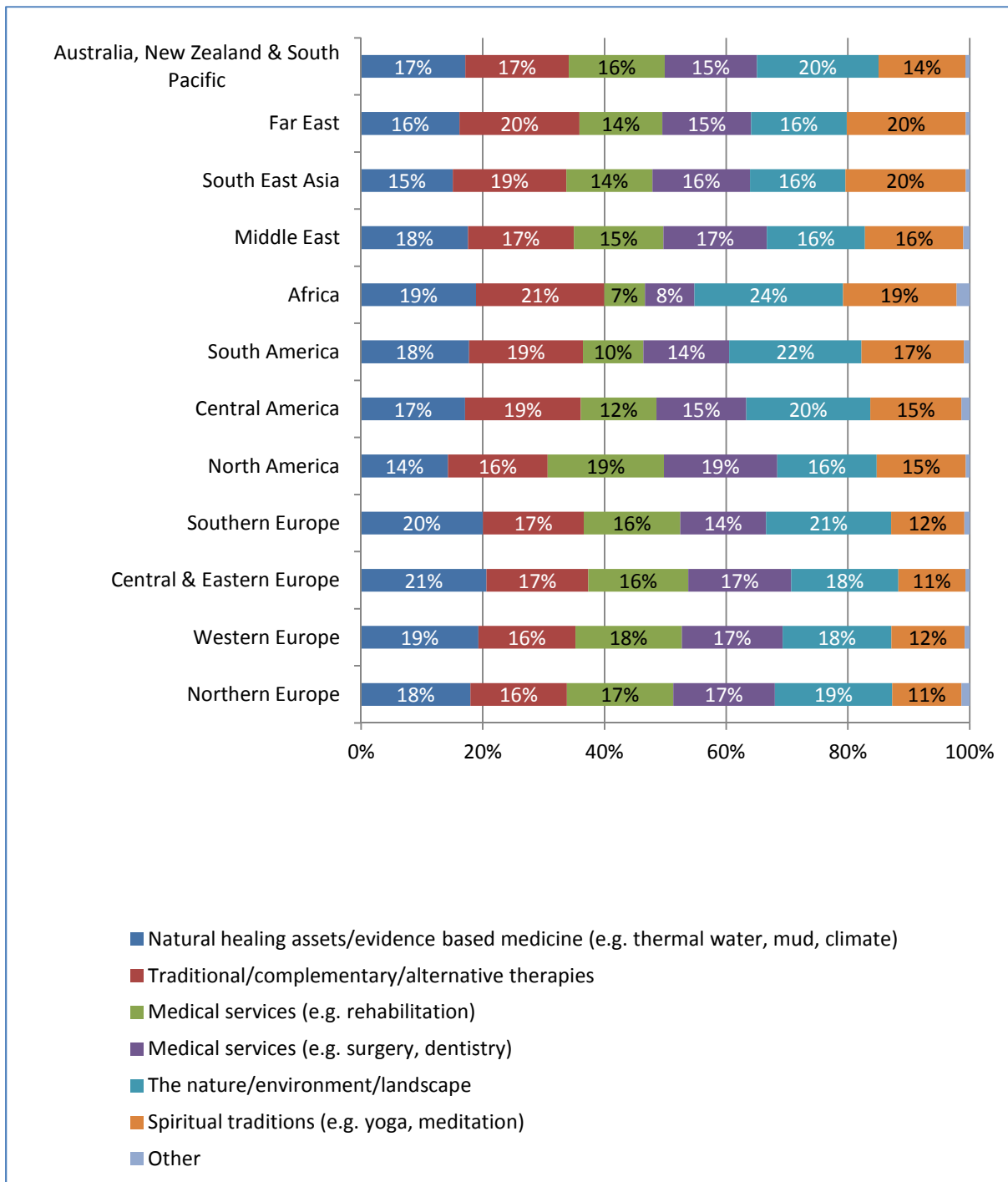
What? - Current Assets (2011)

One of the key objectives of 4WR was the recognition of assets available for wellness tourism. This is key information since the wide range of available assets can serve as one of the foundations for future developments and is essential to product diversification.

4WR found that:

- **Africa:** In Africa, the natural environment and traditional spirituality received relatively high importance as assets for tourism.
- **Asia:** In South-East Asia, spirituality achieved the highest importance (the highest absolute rating among all the regions, too), while medical treatments and services as well as alternative treatments were also important. In the Far East, spirituality and complementary and alternative methods were rated as important assets.
- **Australia, New Zealand and the South-Pacific:** The natural environment and traditional and alternative treatments are important assets, whereas medical services/treatments have the lowest ratings.
- **Europe:** Nature and the environment are important in every region of Europe, particularly in Southern Europe. Natural healing assets are significant in Western and Central-Eastern Europe. Both non-invasive medical treatments (e.g. rehabilitation) and surgical services are important in every sub-region (except Southern Europe).
- **Middle-East:** Natural healing as well as traditional services seem to be important, as are medical services.
- **The Americas:** In North America both invasive and non-invasive medical services are considered to be the most important assets. Alternative treatments and the natural environment also enjoyed high ratings, and spiritual treatments appeared to be more important than in Europe. In Central and South America, the natural environment, the traditional and complementary treatments were important, and medical assets got low ratings in both regions (those results highlight the significant differences in terms of the availability of medical services for tourism purposes and for local needs).

The regional analysis of 4WR data concludes that somewhat surprisingly regions do not differ greatly in terms of available assets that can be used in wellness tourism (For terminologies used in the Report please refer to the [Glossary of Key Terms](#)). This means that every region has wide range of opportunities for wellness tourism development.





What is Hot Now?

Applying a service typology based analysis 4WR can state that the **most popular wellness tourism services** are:

- **Beauty treatments** (89% of the respondents named it as very popular, and popular)
- **Sport & fitness services** (89%),
- **Leisure and recreational spas** (85%), and
- **Spa & wellness resorts** (83%, respectively).

These services can easily be considered as global products since most of the service offers and provision has a tendency to be standardized and is available in almost all parts of the world. In certain regions and countries traditional and local products, like:

- **Evidence based services** (78% of the answers named it as very popular, or popular),
- **Wellness rituals** (65%),
- **Yoga and meditation** (60%) are very well established and popular (For terminologies used in the Report please refer to the [Glossary of Key Terms](#)).

Although 4WR is aimed at wellness tourism services, **medical tourism**, even if only just briefly, has to be considered and mentioned. Wellness and medical tourism, as seen earlier are the key form of travelling for health and certain services, and there are numerous services that are on the borderline, e.g. medical wellness. There is no clear cut distinction between wellness and medical, since that very much depends on cultural, religious and other factors, such as the availability of natural healing resources. Information about medical travel can help us to understand the recent status and future opportunities of wellness tourism, too.

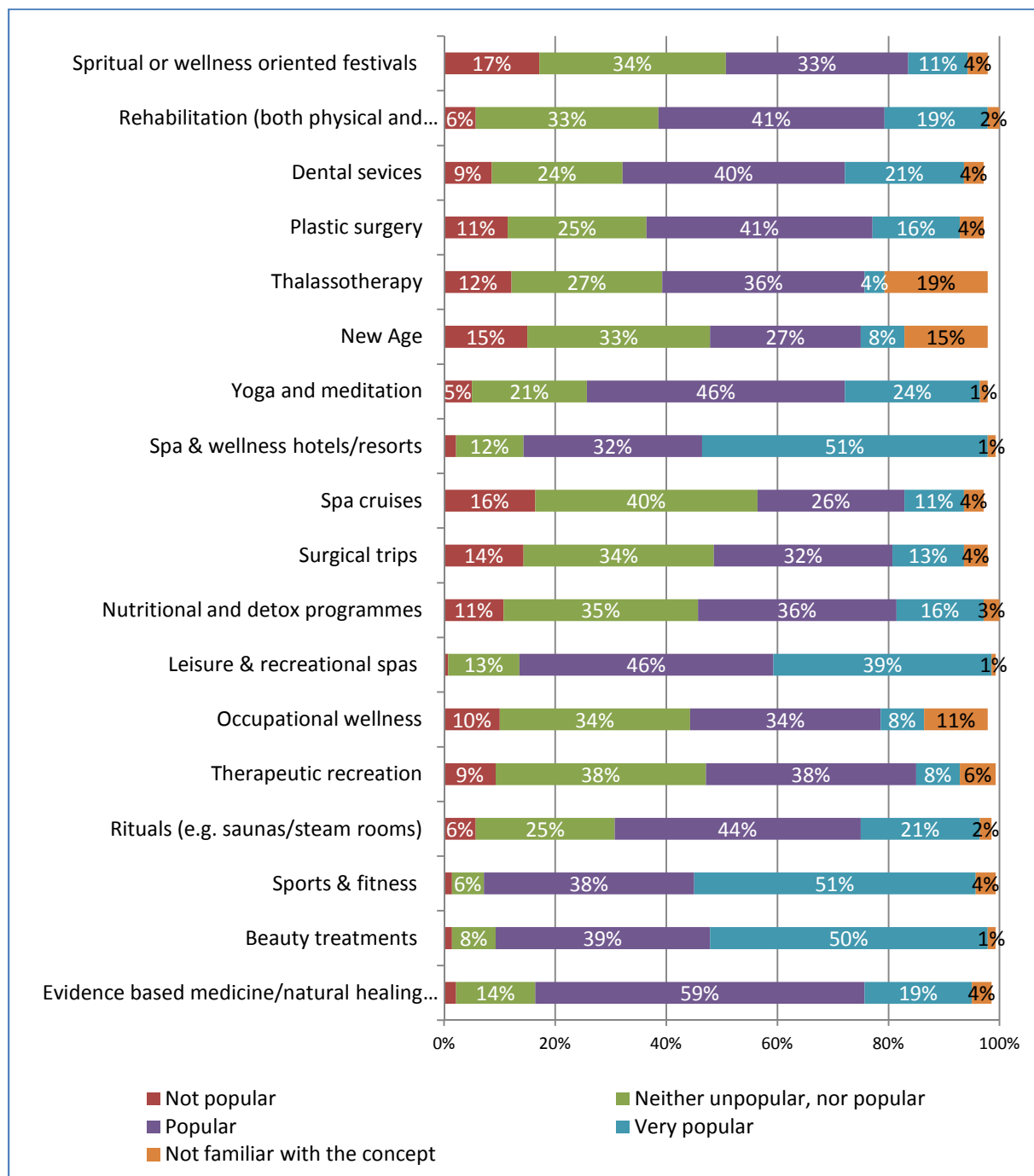
According to the findings of 4WR Traditional medical tourism services (i.e. mainly travelling for surgical interventions, dental services, rehabilitation) seem to be popular (58 % of the respondents considered it as popular, and very popular). It has to be noted, that several wellness approaches have very close links with mental and psychological health. Travellers in search for mental balance or better mental state look for complementary or alternative approaches, many of which (e.g. Ayurveda, yoga retreats, faith, mediation) are closely related to medical treatments.

Based on the findings of 4WR, several **niche products** can be labelled as being neutral ('neither popular, nor unpopular'). The neutral position does not necessarily mean that in certain regions or countries these products would not enjoy a higher degree of popularity:

- **Spa cruises** (40% of the responses considered it neither popular, nor unpopular),
- **Therapeutic recreation** (38%), and
- **Nutritional and detox programmes** (35%).

In some other cases 4WR identified **lack of information** even among professionals about products, which highlights the need of more information provision and sharing experiences?

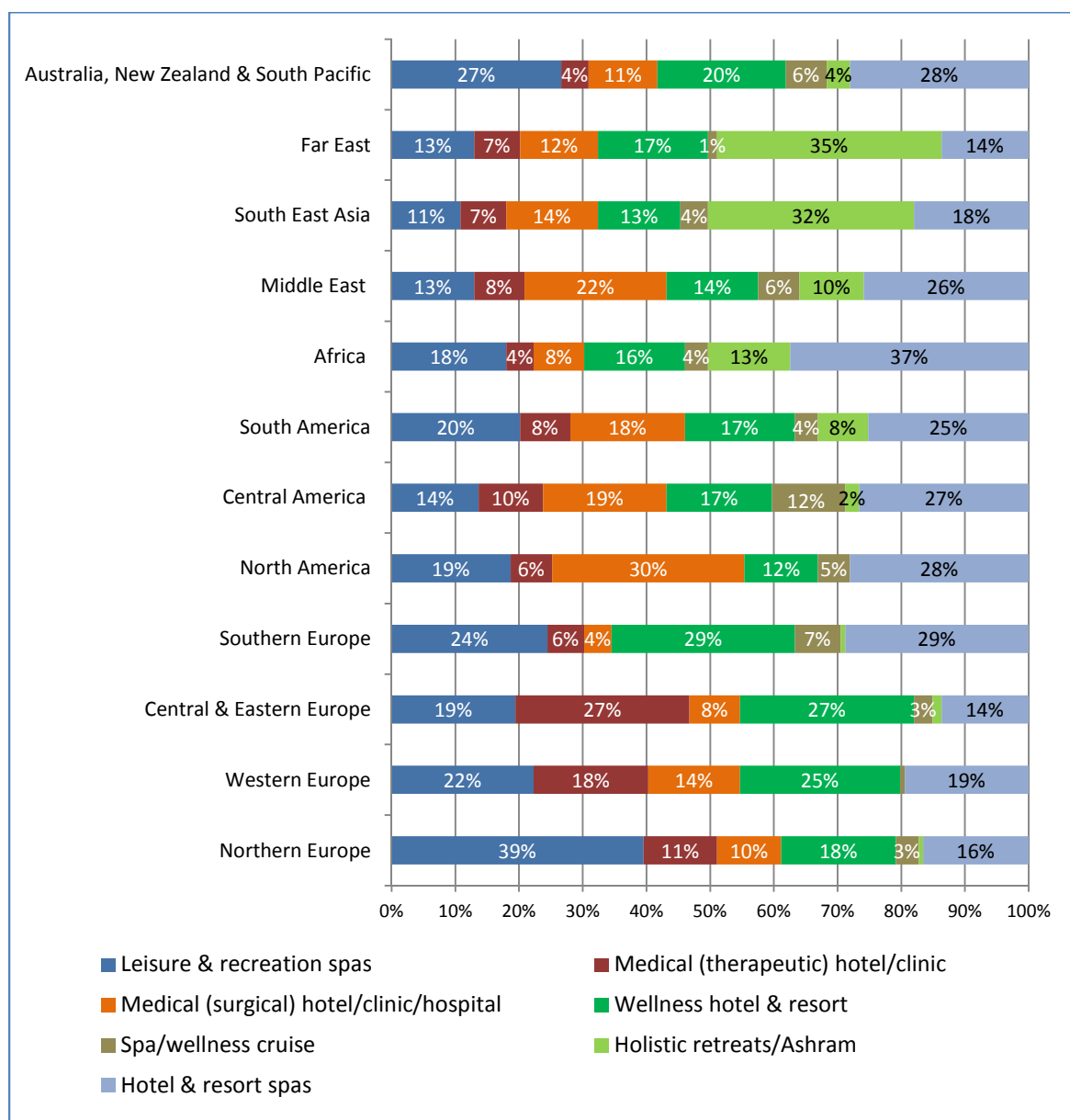
- **Occupational/workplace/corporate wellness** (19% of respondents reported unfamiliarity with the term),
- **Thalassotherapy** (19%), and
- **New Age** (15%, respectively).



What is Hot Now – By Regions

Considering the important geographical and cultural differences in global wellness tourism, the information collected should be analyzed region-by-region. In this regional analysis we can highlight the specific products and services that are popular in a certain region as of 2011.

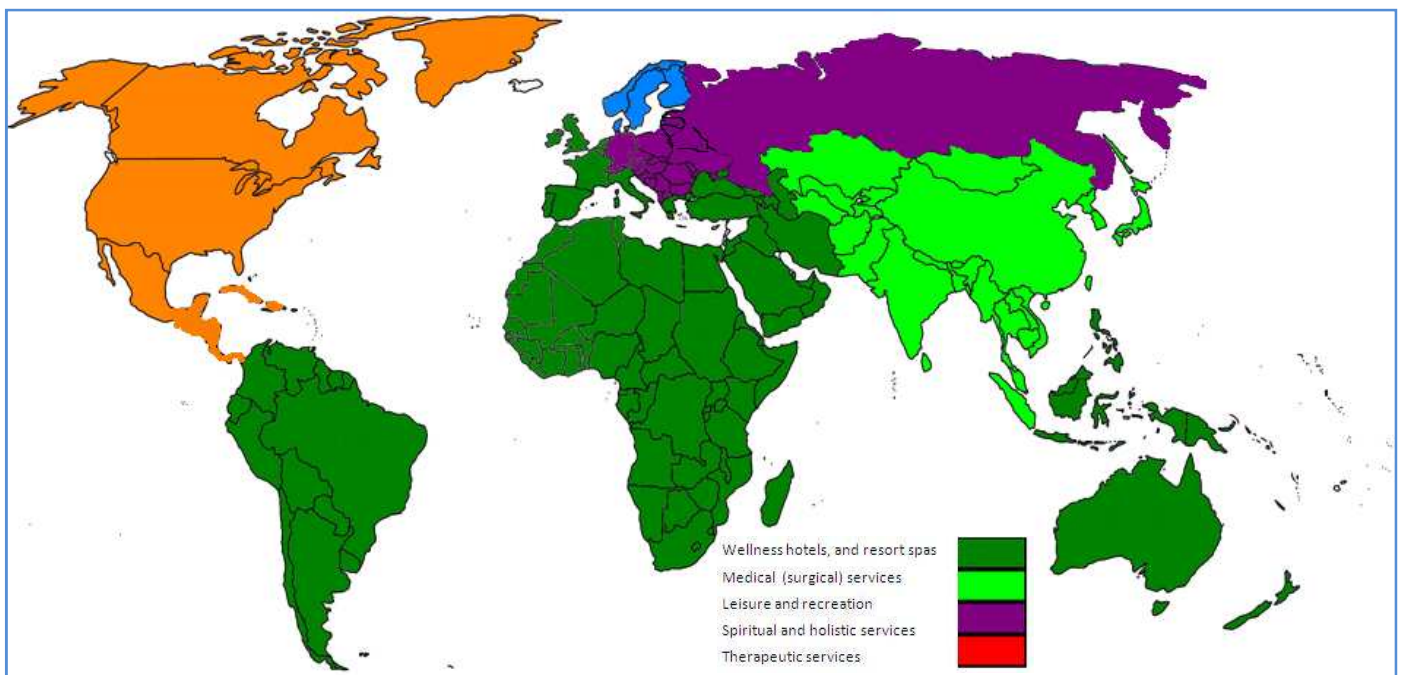
Traditions, lifestyle defining approaches (e.g. yoga) and the availability of **natural assets** (e.g. thermal waters) shape the world in terms of key wellness tourism resources.



The chart gives a great overview of the availability of certain services and visualizes the existing regional differences and specializations. The existence and development of certain services certainly depends on the availability of related resources (e.g. thermal springs, the sea or spiritual heritage).

The currently most important assets are very different from region to region, which could serve as sound foundation for international wellness tourism, if they were utilized in a competitive fashion since international wellness travellers typically look for special qualities and local experiences:

- Large number of leisure and recreation spas operate in Northern Europe,
- Therapeutic medical hotels/clinics are typical of Central Europe,
- Surgical medical clinics play an important role in North America,
- The number of wellness hotels & resorts is significant in Southern Europe,
- Holistic retreats are fairly common in the Far East, and
- Spa and wellness cruises show moderate (but higher than average) importance in Central America.

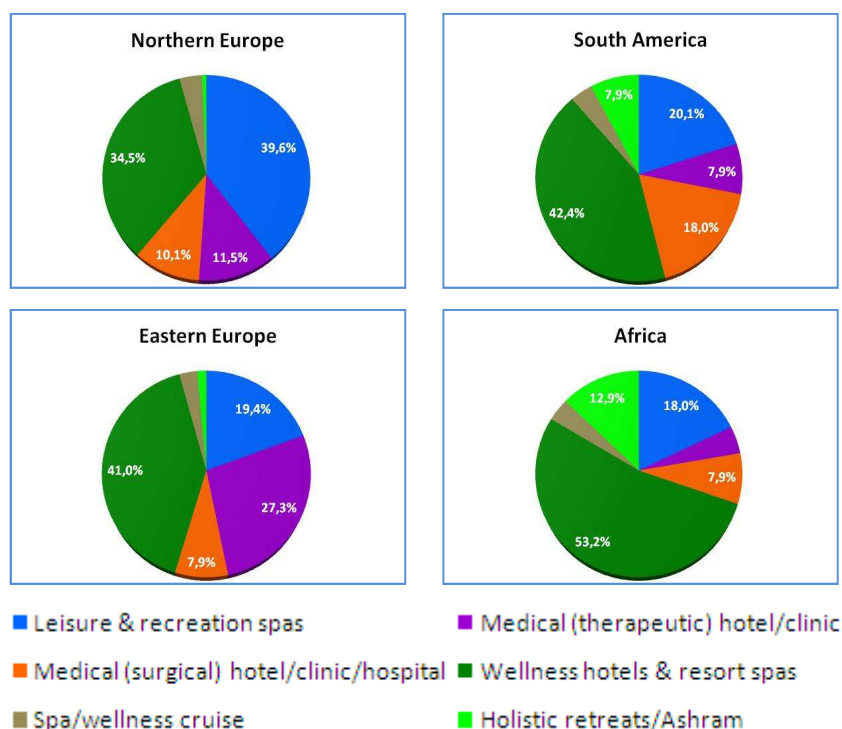


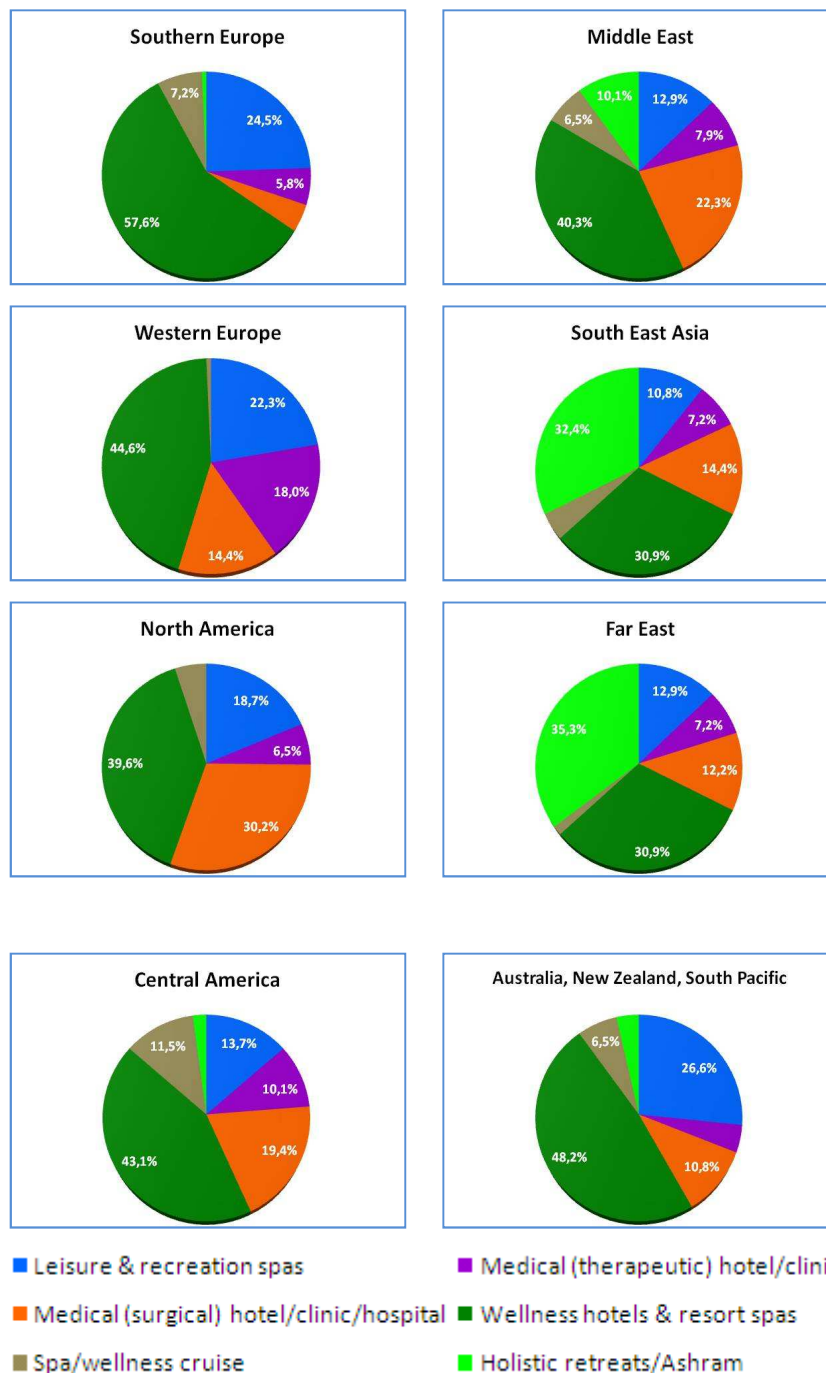
According to the most popular services, the world's map is characterized by five main service groups:

- 1) **Wellness hotels and resort spas**, that offer wide range of wellness services from fitness, through beauty to spa treatments, and provision is often based on some water resources.

- 2) **Medical (surgical) services** refer to trips where treatments involve certain operation(s), e.g. dental or cosmetic works, or even life-saving operations.
- 3) **Leisure & recreation** is more related to everyday life and lifestyle than to tourism. Wide range of facilities and services are provided (e.g. waterparks) for visitors who are looking for relaxation, fun and revival.
- 4) **Spiritual and holistic tourism** services focus on the spiritual quest of the individual leading to transcendence or enlightenment. This may or may not have a religious affiliation, but it is often likely to include rituals, ceremonies, and traditions that are derived from different religions
- 5) **Medical (therapeutic) services** are somehow different from surgical. It has similar elements, i.e. medical checkups and diagnosis, but its difference lies in the fact that it often requires a long stay or a repeat visit to the destination. Therapeutic tourism tends to use some natural assets that have a healing capacity and it has links to Therapeutic Recreation which focuses on rehabilitating people with illnesses or disabling conditions.

The detailed regional analysis reveals that there are significant differences in wellness tourism region-by region. Marketers, developers and policy makers need to take these differences into consideration; especially that travellers are expecting more and more destination-specific or authentic services that complement globally available products and services that has the tendency to provide '*placeless*' experiences.

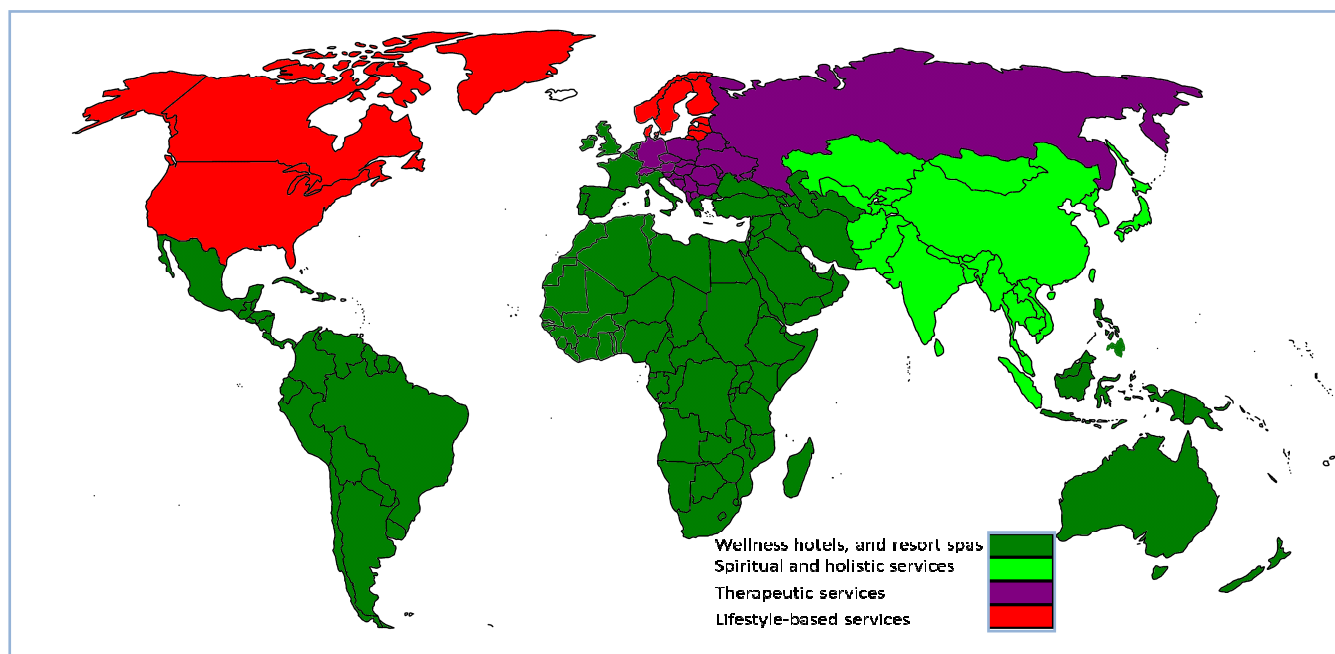




In light of these findings, especially in comparison with information about the available assets, regions seem to have missed to capitalize the assets, since in many regions, standardized services have become the most popular (e.g. wellness resorts or spas). This should be noted by developers and policy makers, since this can lead (and in many destinations already did) to losing competitive advantage and can risk sustainability.

Where - Regional Hotspots 2020!

4WR also focuses on the future state of wellness tourism and projects popular products and services by or in 2020, categorized by region. Comparing current data with future trends, the supply of wellness tourism services will change significantly in the coming 10 years. According to 4WR traditional, lifestyle defining approaches (e.g. yoga) will become widely accepted in wellness tourism services in North America and Northern Europe.



Wellness hotels and resort spas are already are and forecasted to remain to be the most popular wellness tourism product in several important continents and regions by 2020 including Africa, South America, Central America, Australia and New Zealand.

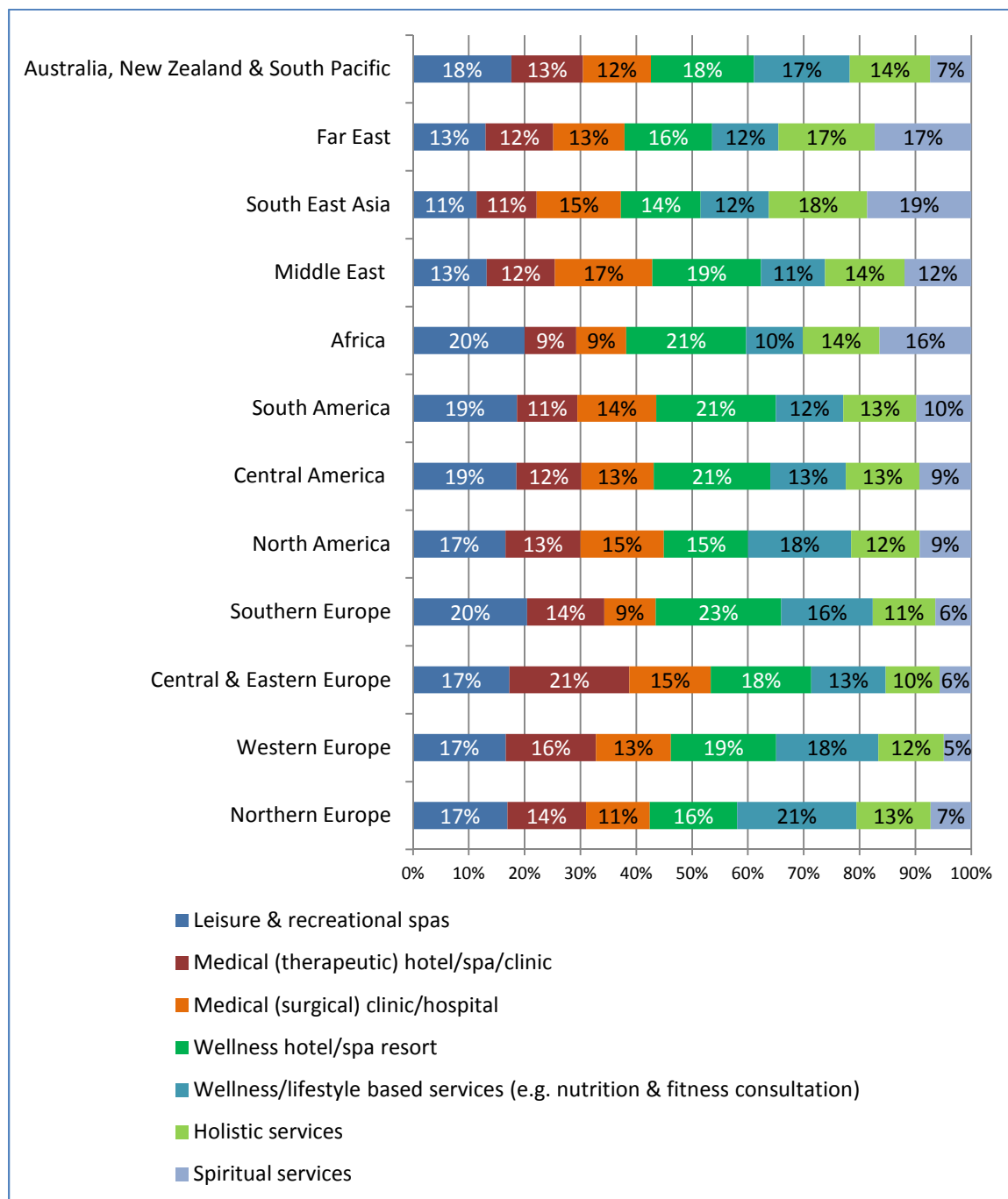
Spirituality remains dominant in Asia. In Central and Eastern Europe, therapeutic services and treatments are mainly based on the availability of natural assets (e.g. thermal waters) and will stay/or become the most important.

Products that **will be available globally** and will lose their differentiating qualities by 2020 include beauty treatments, massage of any kind, and sauna of any kind, day-spas, and some spiritual practices (e.g. yoga or meditation).

Products & Services in 2020	Most Important Region
Therapeutic Services	Central-, Eastern Europe
Spiritual & Holistic Services	Far East, South East Asia
Wellness Hotels & Resort Spas	Africa, Central and South America, Middle East, Australia, New Zealand & South Pacific
Lifestyle-based Services	Northern, Southern and Western Europe, North America

Many fusion/crossover products (e.g. hotel-to-hospital conversions, e.g. medhotels) or new products and solutions (e.g. various apps) not yet known or understood globally (for terminologies used in the Report please refer to the [Glossary of Key Terms](#)).

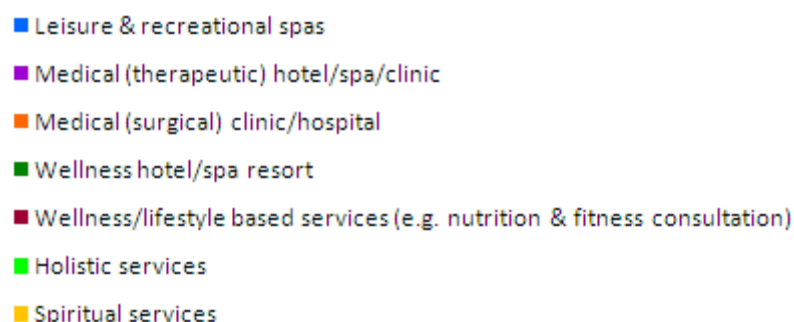
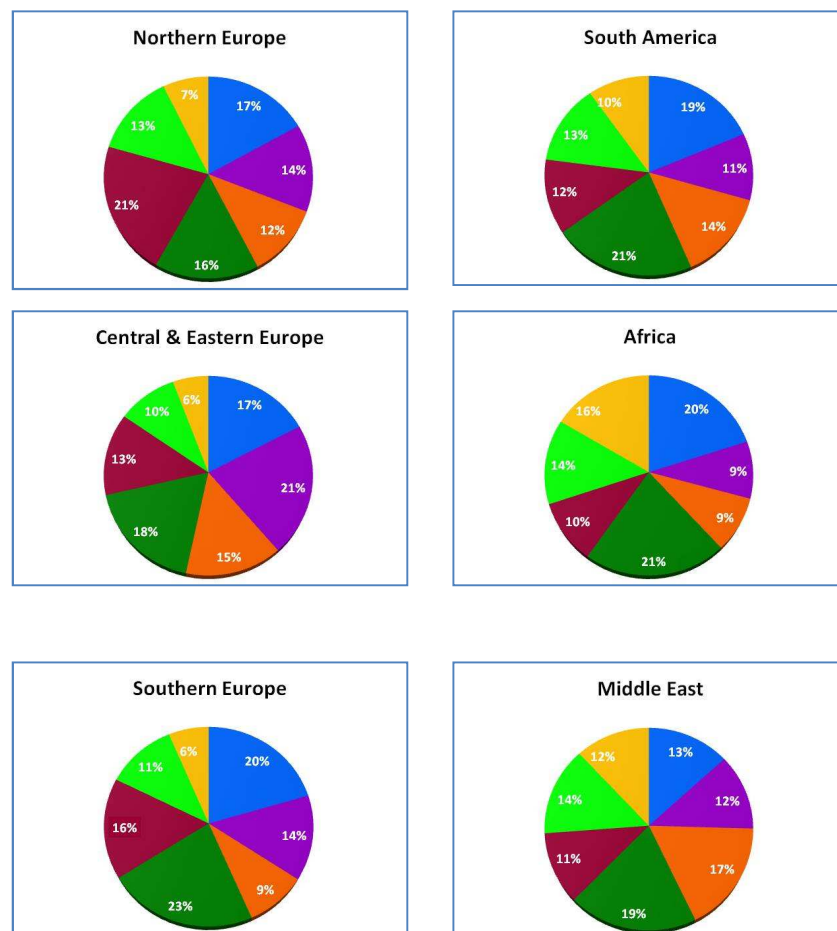
4WR highlights the trend; however, that there is a clear interest in the market to see new services and products that can differ from standardized services. The wellness tourism industry needs to better inform the market about the available assets and products, since many new products are not known and concepts are not yet generally accepted.





Summarizing the key trends we can say that:

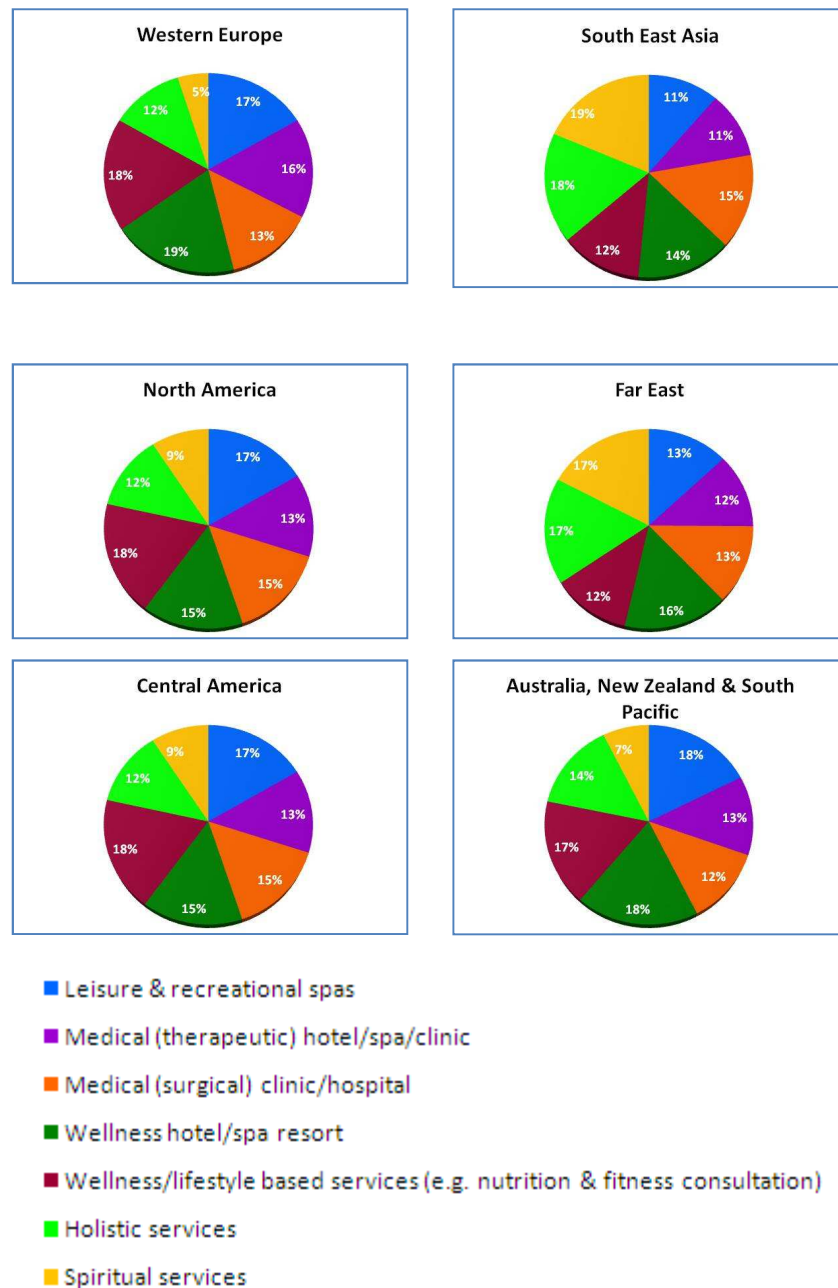
- **Africa** will show an increase leisure and recreational segment, based on wellness products.
- In **Australia, New Zealand and the South-Pacific** leisure and recreational spas, as well as wellness hotels and spas seem to be the most important in 2020, while the new lifestyle based services (e.g. combination of physical fitness, nutrition and will gain ground.





In Asia and the Middle East:

- In **Far East** holistic and spiritual approaches/services will still be the most important services, with a strong wellness base.
- **South-East Asia** will still be the main centre for holistic and spiritual tourism.
- In the **Middle East** wellness as well as medical tourism will determine the market.



In the Americas:

- **South America and Central America** remain to be strong in wellness tourism, as well as in leisure and recreational spas.
- In **North America**, wellness and life-style based services will gain importance, based on leisure and recreational spas, and wellness hotels.

In Europe:

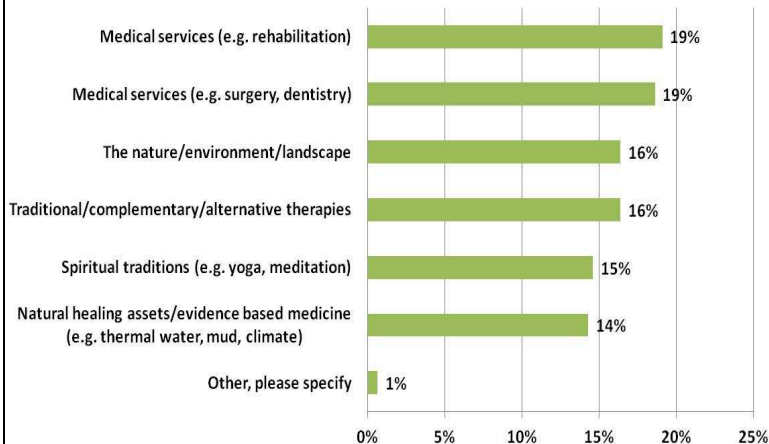
- **Southern Europe** seems to be the most dominant in leisure and recreational spas (with the highest rating in the world), but wellness hotels and spas will dominate the market.
- In **Central and Eastern Europe**, therapeutic medical services still dominate the market, but wellness and lifestyle-based services will be important.
- The **Western European** health tourism market will be dominated by wellness hotels, but leisure and recreational spas remain to stay popular.
- **Northern Europe** will be the most important hub for wellness and lifestyle-based services, with leisure and recreational spas.



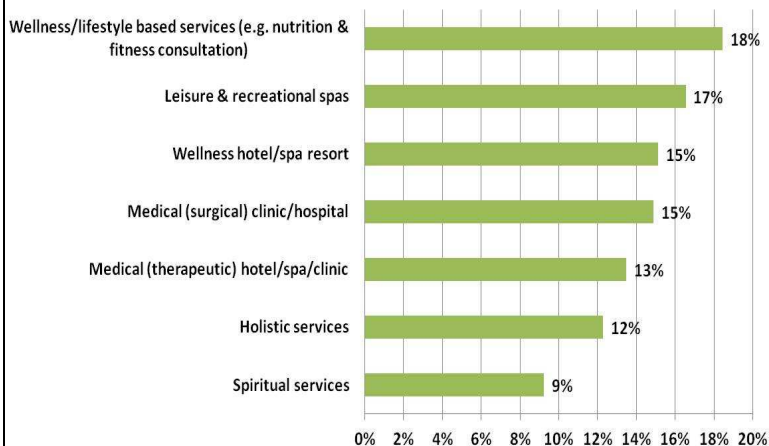
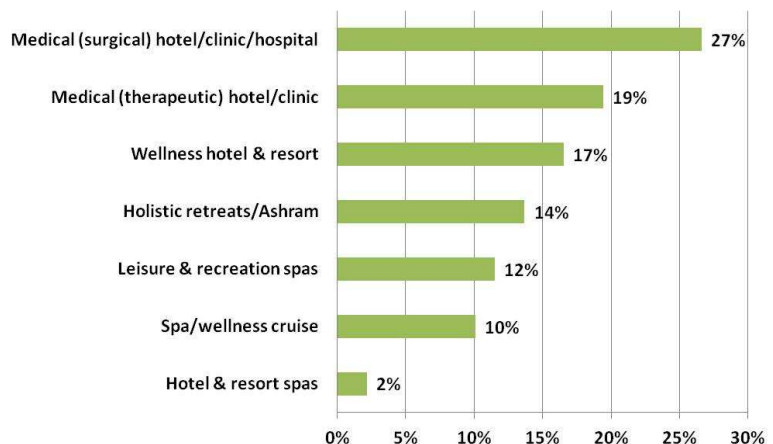
North America



Assets 2011



Services 2011



Services 2020

Key findings

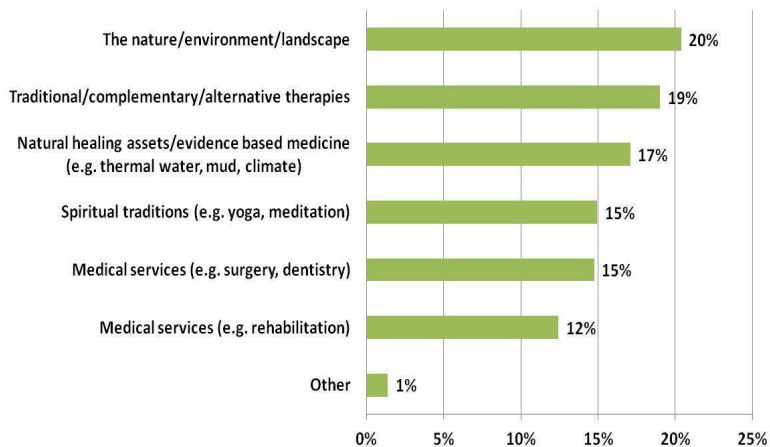
- Current key assets include medical, nature and CAM.
- Lifestyle and wellness based services will become increasingly significant
- Medical services will be eclipsed by the focus on disease prevention.



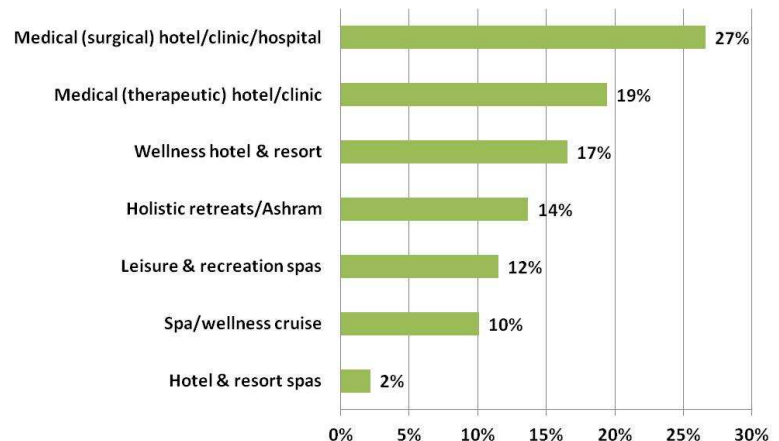
Central America



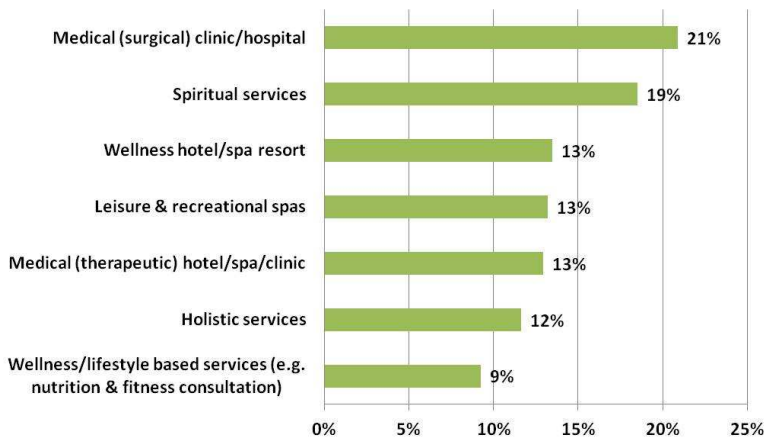
Assets 2011



Services 2011



Services 2020



Key findings

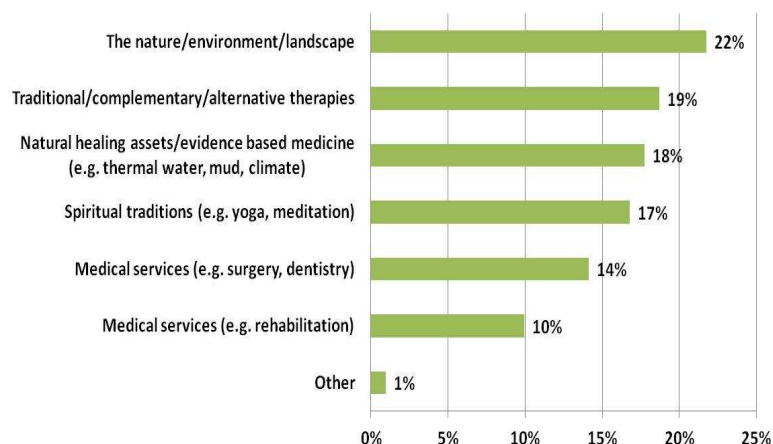
- Surgical medical services seem to be the dominant product, however natural resources and complementary treatments are the main endowments.
- There are uncaptured resources in the area of developments connected to nature and complementary treatments (eg. spiritual services, resorts, holistic treatments).



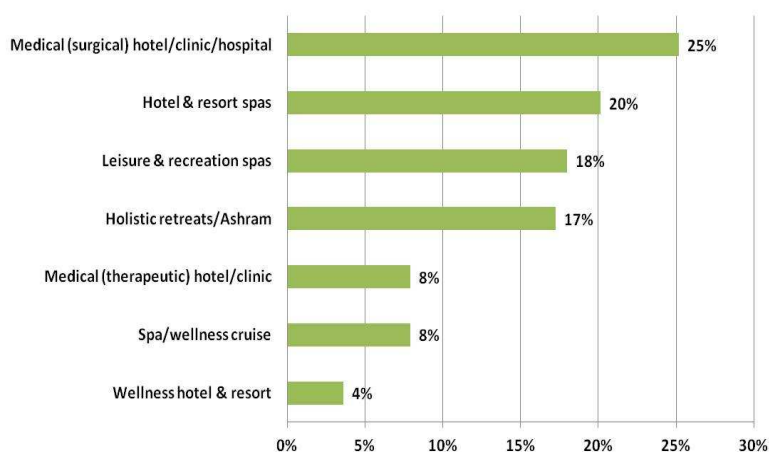
South America



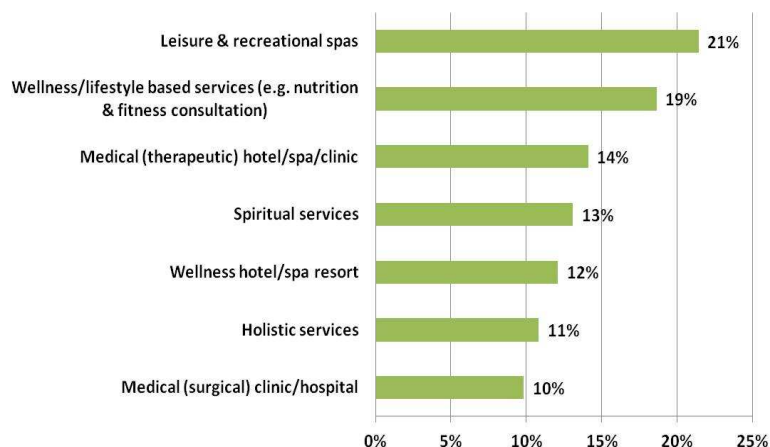
Assets 2011



Services 2011



Services 2020



Key findings

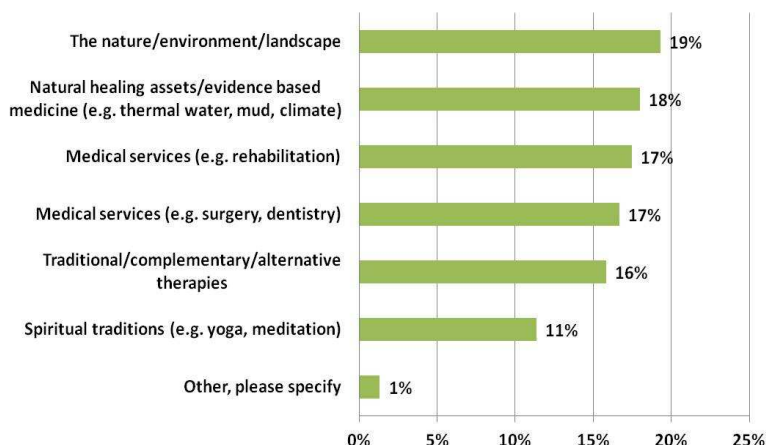
- Leisure & recreational facilities are already available in the region, and will grow according to the forecasts, so will therapeutic medical services connected to CAM.



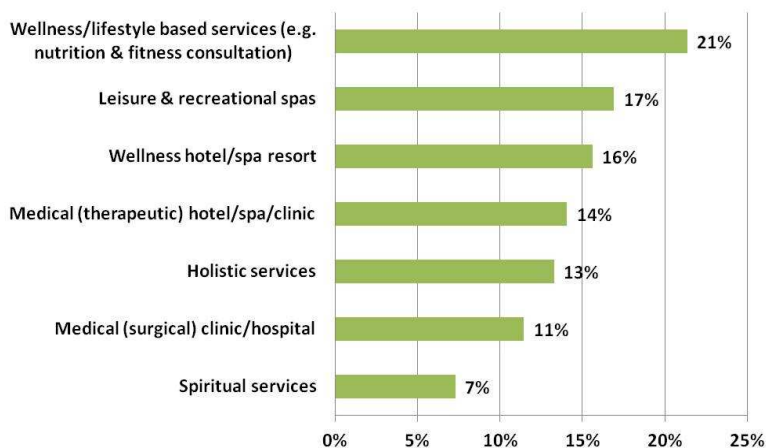
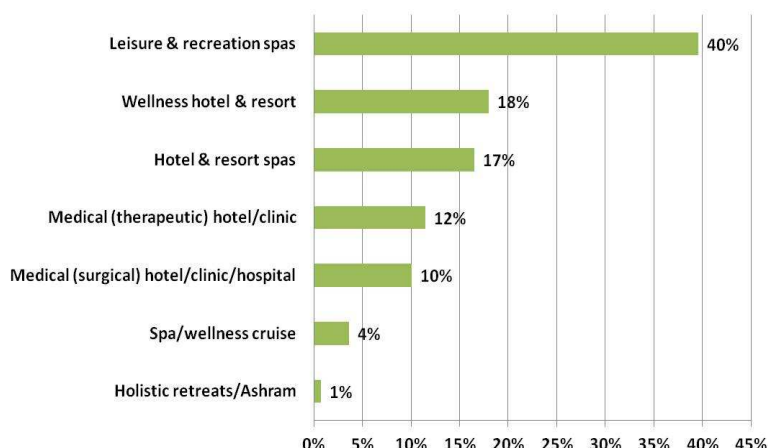
Northern Europe



Assets 2011



Services 2011



Services 2020

Key findings

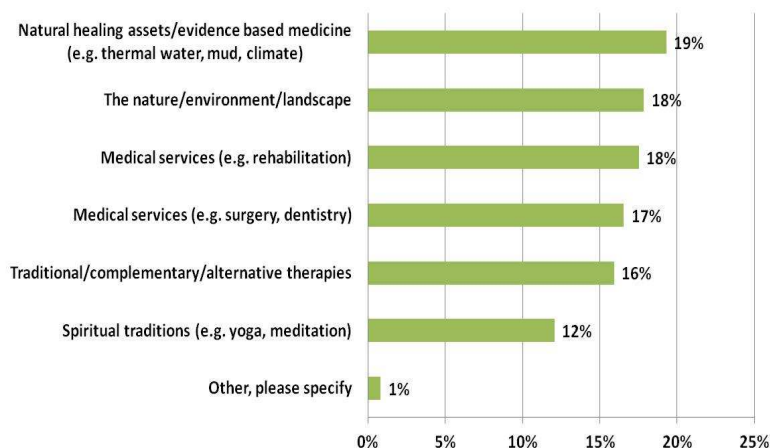
- Nature and the natural healing assets are the dominant resources of the region, but these so far are partially used in wellness tourism.
- According to trends, wellness and lifestyle based services will gain ground (e.g. Nordic Well-being).



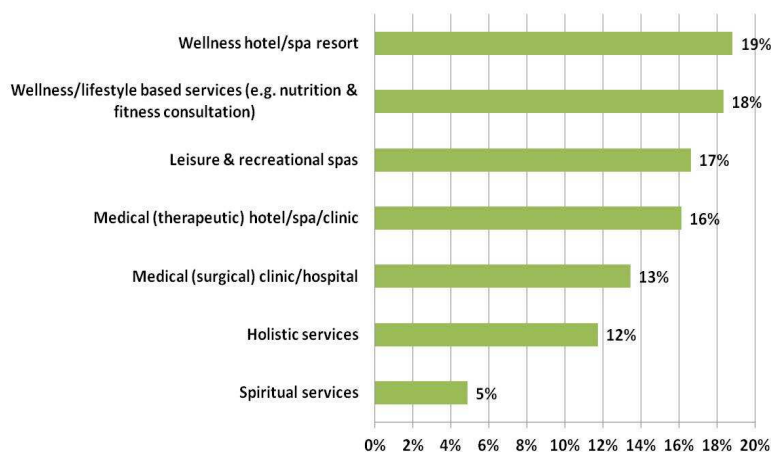
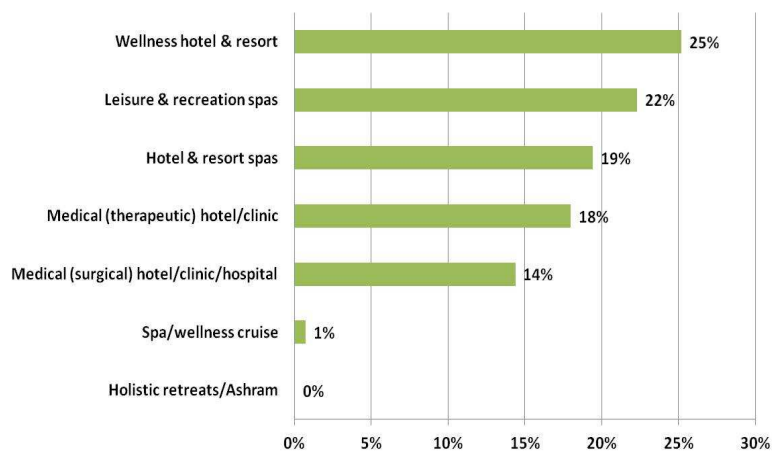
Western Europe



Assets 2011



Services 2011



Services 2020

Key findings

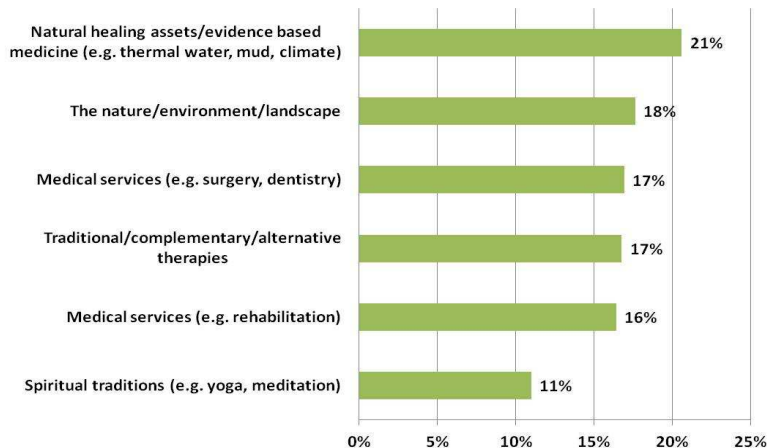
- Natural resources and healing assets determines the market, and remain to be important.
- Lifestyle-based services will start to develop.



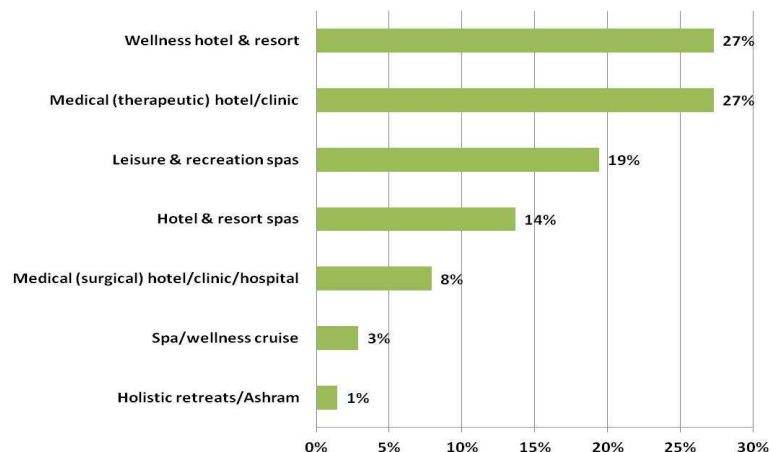
Central and Eastern Europe



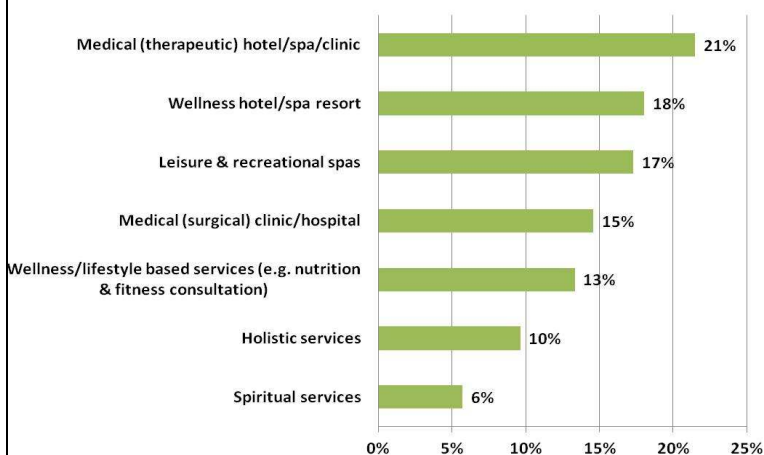
Assets 2011



Services 2011



Services 2020



Key findings

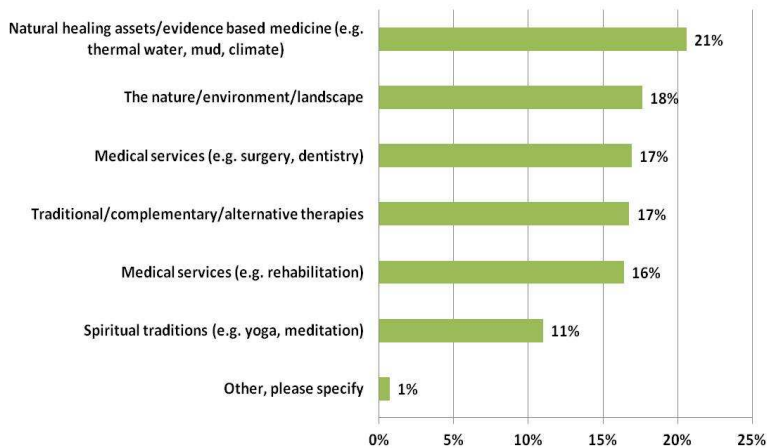
- The natural resources and healing assets are the key factors in the region, which remain to enjoy similar popularity.
- The trends of 2020 do not show any changes, however there are new global trends, so the region should focus on producing innovation capacity, and developing product diversification.



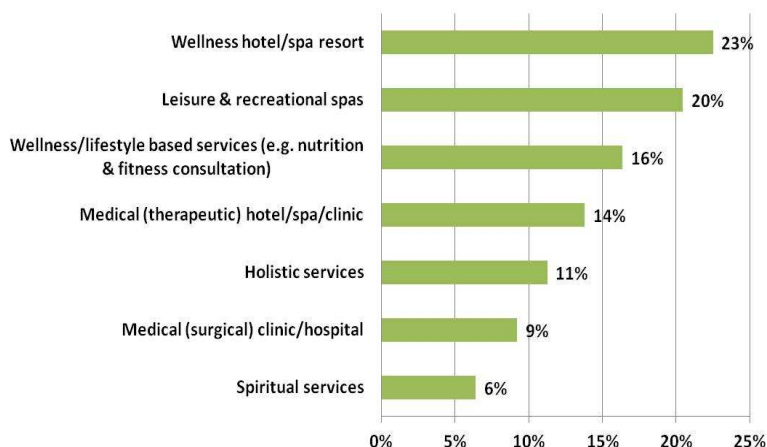
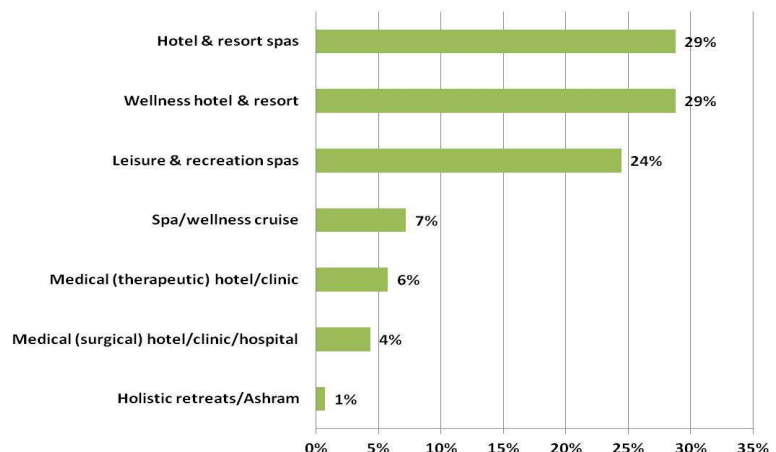
Southern Europe



Assets 2011



Services 2011



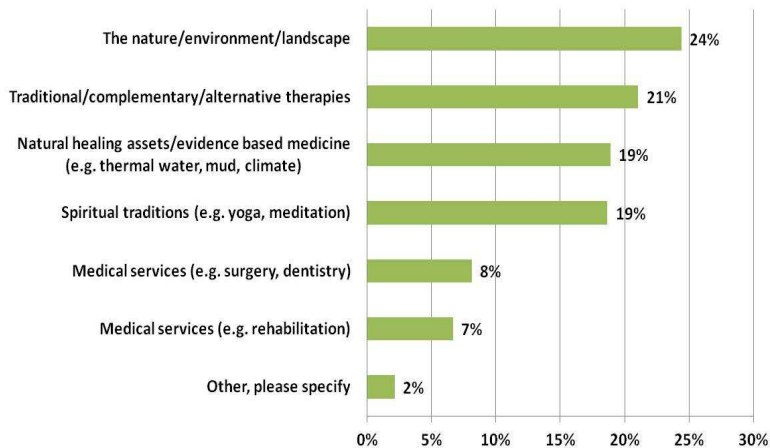
Services 2020

Key findings

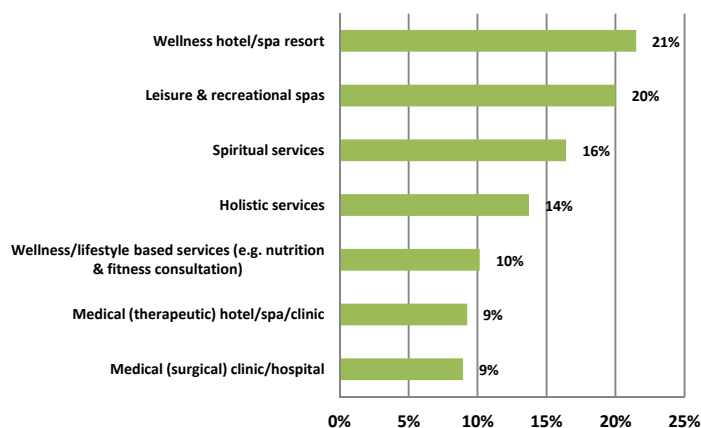
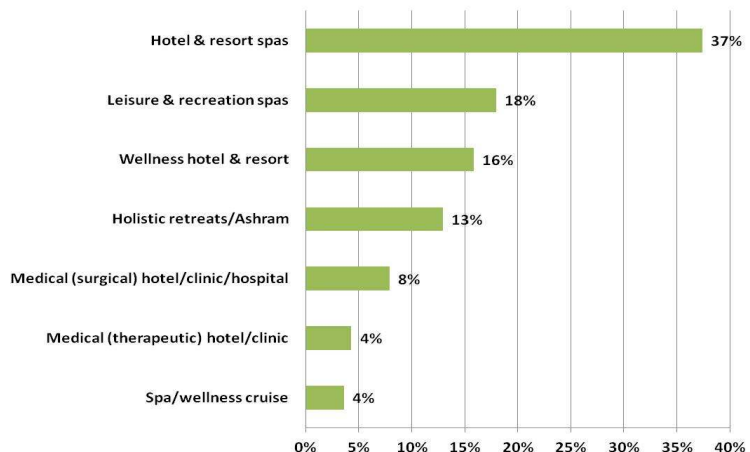
- Natural healing assets and complementary services haven't reached their potential, and it cannot be expected either in the future.
- Great changes are not expected, so the innovation capacity and the product diversification should be enhanced.



Africa



Services 2011



Services 2020

Key findings

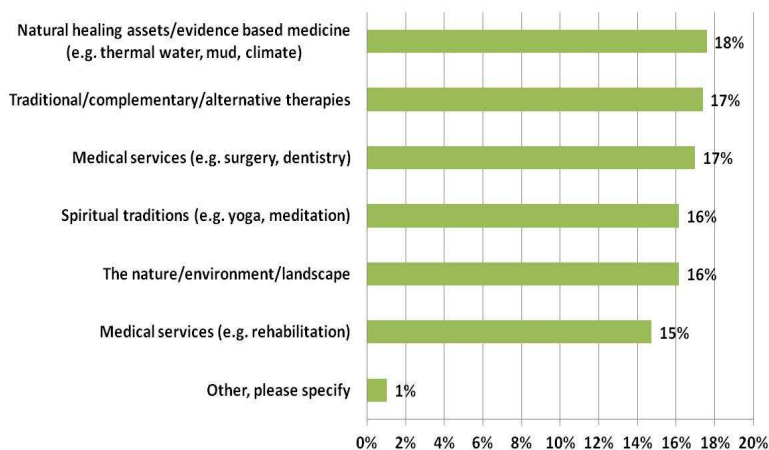
- Complementary services are dominant but have not been captured yet, and it cannot be expected either in the future.
- 4WR does not predict definitive changes, therefore the focus should be placed on innovation & diversification.



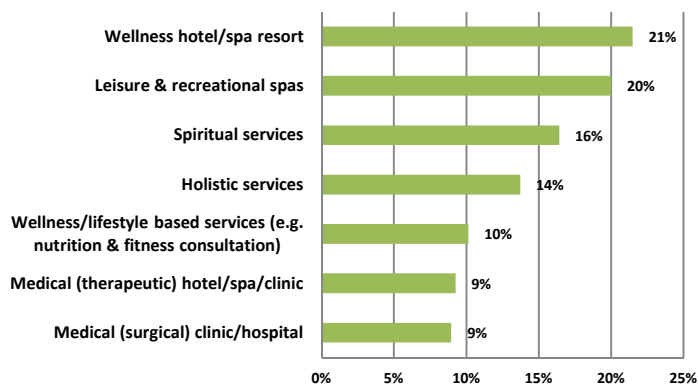
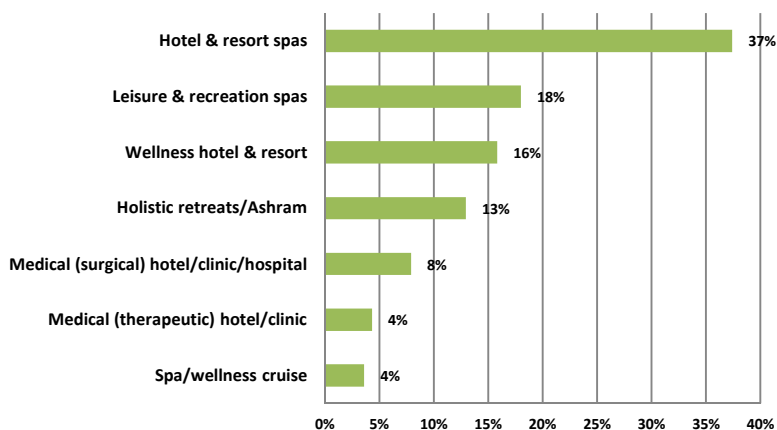
Middle-East



Assets 2011



Services 2011



Services 2020

Key findings

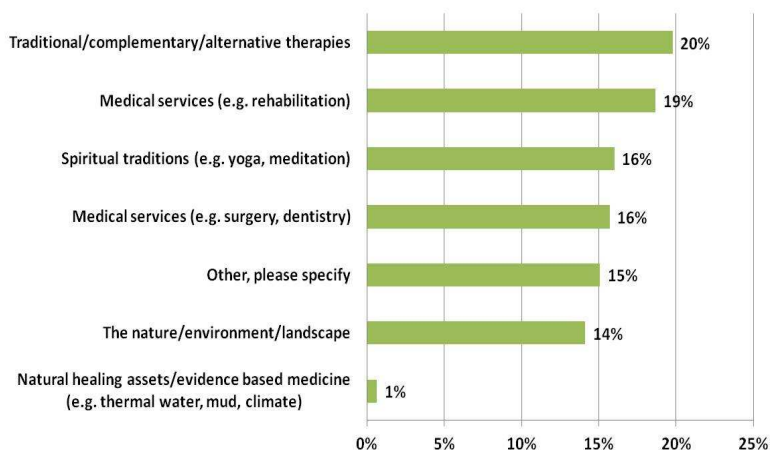
- Wellness and leisure services play a dominant role in the region, but spiritual and holistic services can be expected to increase.



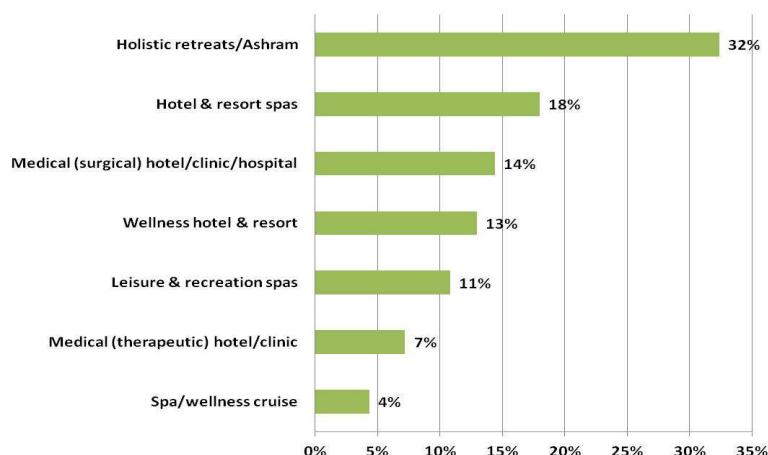
South-East Asia



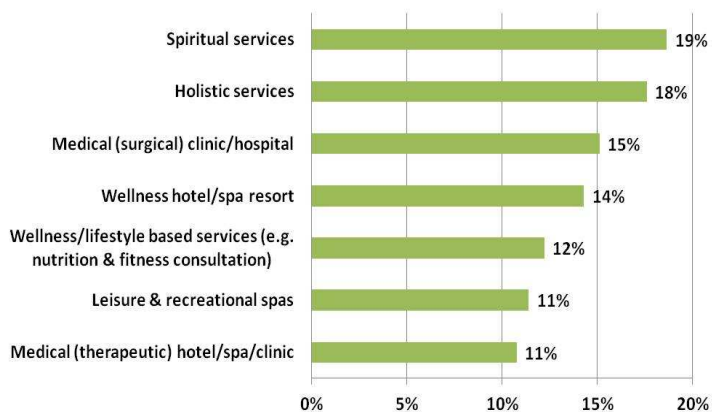
Assets 2011



Services 2011



Services 2020



Key findings

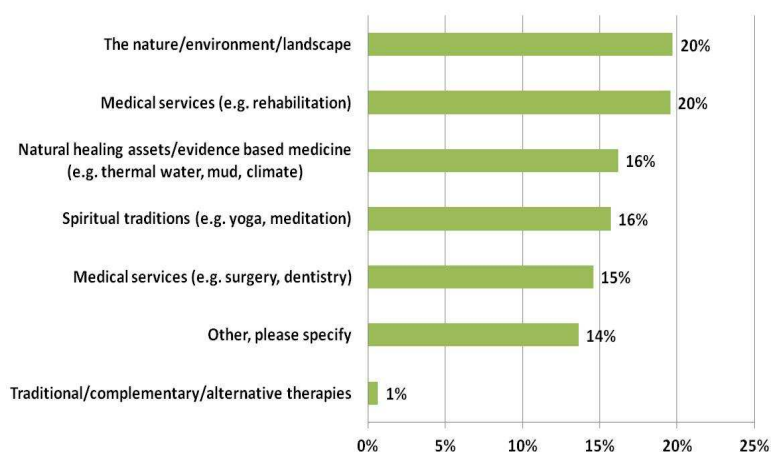
- The region will show great specialization in spiritual and holistic tourism, but medical tourism will be important as well.



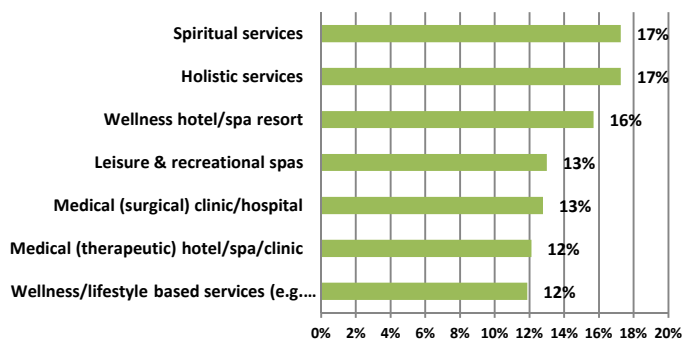
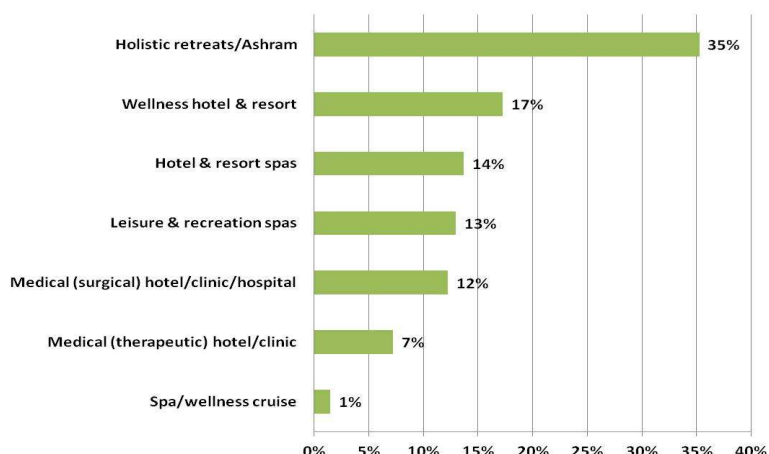
The Far East



Assets 2011



Services 2011



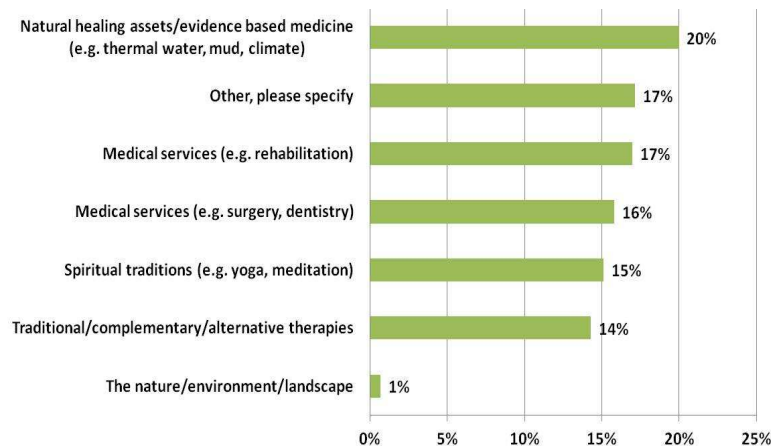
Services 2020

Key findings

- The region will show changes toward lifestyle-based and therapeutic services from holistic and wellness tourism, by capturing the great natural (e.g. thermal) and therapeutic resources.

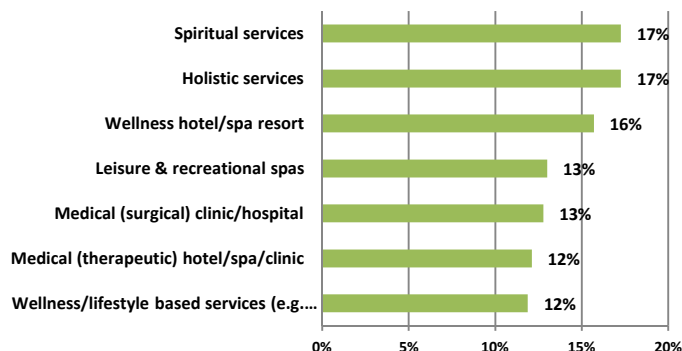
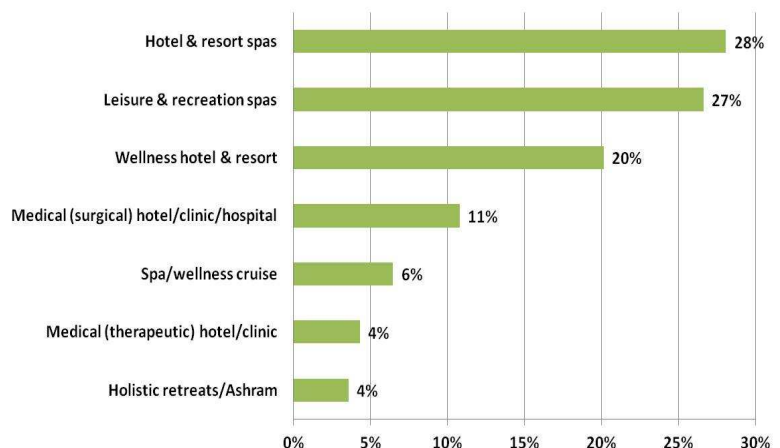


Australia, New Zealand & the South Pacific



Assets 2011

Services 2011



Services 2020

Key findings

- The region has basic assets in natural resources, which not yet been captured.
- According to 4WR standard, non-site specific services will become available, which can raise some doubts about the success of these developments.

Regarding the **product-base analysis** the following, overall results can be highlighted considering the global health motivated travel market:

- There is no indication of emerging megatrends expected before 2020.
- Wellness destinations and hotel spas will remain as dominant products (having 18.5% of the answers), while leisure & recreational programs and services will be the 2nd most popular service (16.7%).
- The new trend of wellness and lifestyle based services will increase dynamically, and reach the 3rd on the popularity list of wellness products.
- Leisure and recreational spas will be particularly popular in Southern Europe and in Africa. Wellness hotel and spas will be outstandingly important in Southern Europe, Central and South America as well as in Africa. While wellness and lifestyle based services will dominate the Northern European as well as the North American market.
- Holistic services as well as medical services will show an average popularity regarding the global trend.

	Lifestyle	Leisure	Spiritual	Wellness	Therapeutic	Medical
Australia, New Zealand & the South Pacific	▲	•		•		
Africa		•	▲	•		
North & Central America	▲	▲		▲		▼
South America		•		•		•
Middle East			▲	•		•
South-East Asia			▲	•		•
Far East			▲	•		
Northern & Western Europe	▲	▼		•		
Central & Eastern Europe		•		•	•	
Southern Europe	▲	▲		•		

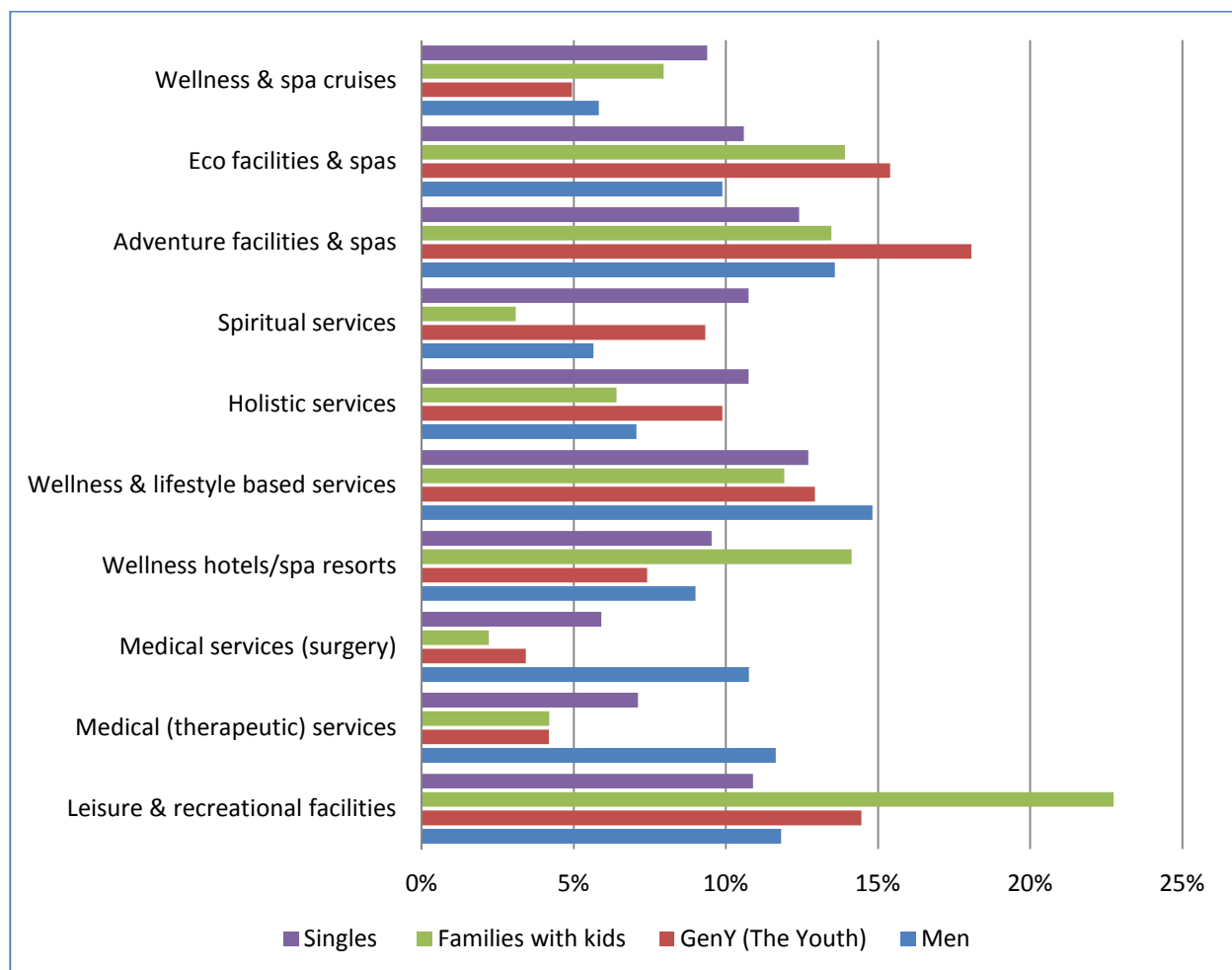
Legend: ▲ – growth, • - stagnation, ▼ – decline; blank box indicates that the given product is not significant



For Whom: Consumer Preferences

Four segments chosen for preference analysis include **men, singles, GenY** and **families**. Wellness tourism preferences were analyzed against 10 tourism products (i.e. leisure and recreational facilities, therapeutic services, medical services, wellness hotels/spa resorts, wellness/lifestyle based services, holistic services, spiritual services, adventure and eco facilities and spas, and wellness & spa cruises).

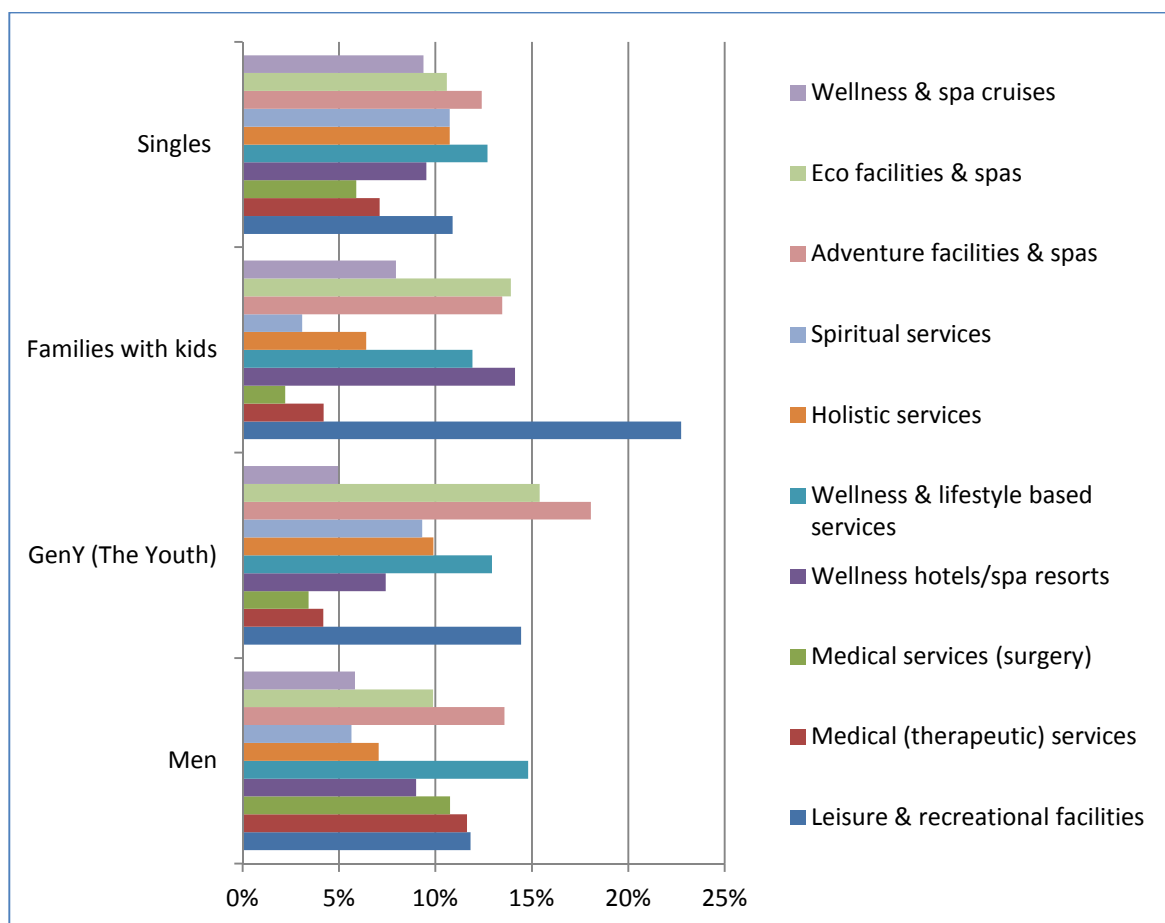
Certainly, there are many other segments in wellness tourism, but these four were selected (from the many) as not yet considered to their full potential and needing more attention.





Regarding segment-based analysis the following results can be seen:

- **Singles** will prefer wellness and lifestyle-based services as well as leisure and recreational facilities and spas.
- **Families** will show a continued interest in leisure and recreational services, but wellness hotels and spas will also be popular.
- **Generation Y** (young people) will show growing demand for adventure and eco facilities and spas.
- The popularity of wellness and lifestyle based services, as well as adventure facilities and spas will grow among **men**.

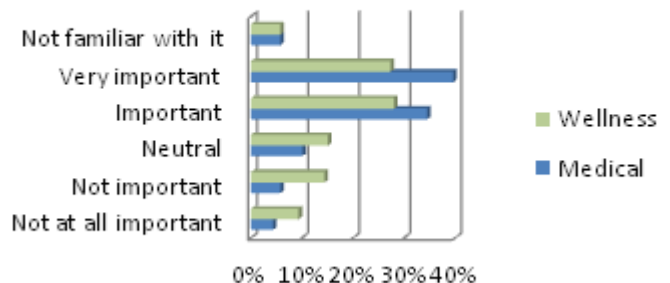




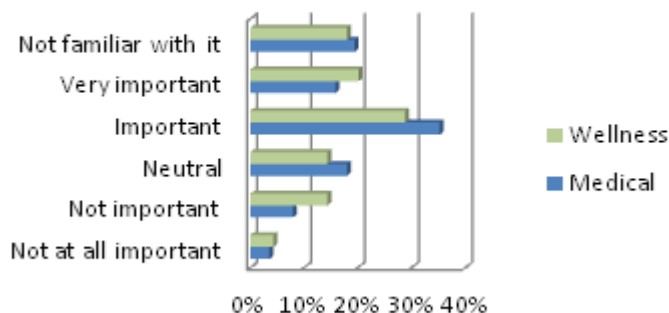
Who Should Pay?

Country practices and approaches to paying for wellness-oriented travel differ greatly. According to the results of 4WR: Full Report, **private health insurance** is expected to play a more important role in providing policies that cover wellness travel.

State health insurance

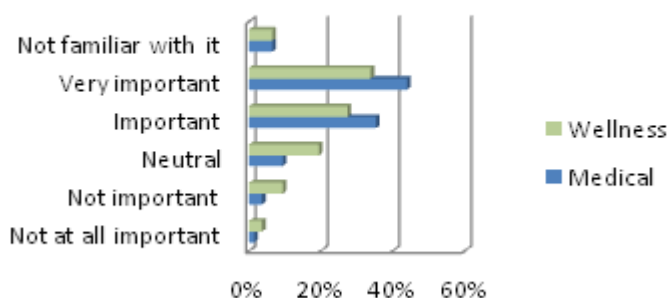


Holiday voucher



Interestingly, respondents participating in the 4WR survey revealed that in the field of medical tourism, the state should be playing a more significant role. There is a significant lack of information about how either private or state bodies can or should get involved in the financing of wellness tourism (e.g. in the form of holiday vouchers in Europe).

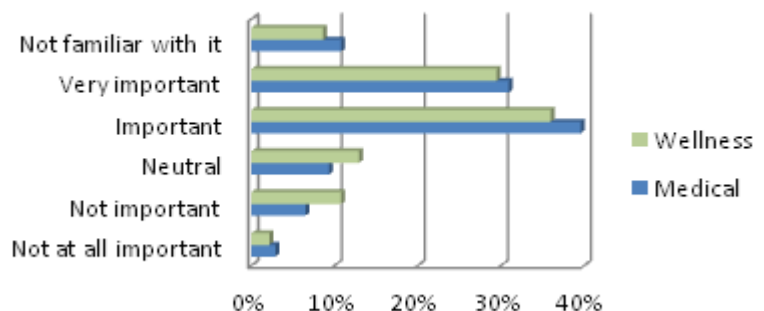
Private health insurance



Considering the financing of the health tourism industry, the most important player is the state health insurance in the area of medical tourism, and private health insurance has a dominant role in the wellness sector.

Support by companies seems to be relevant in medical tourism; however there is a lack of information in this field, as well as in the area of holiday vouchers.

Support by company



Conclusions

Wellness tourism is one of the fastest growing forms of international and domestic tourism and is in step with consumer and stakeholder interest in the burgeoning wellness industry. This trend is not expected to change in the coming 5-10 years. There is one major risk, however: the globalization of standardized and uniform products and services, which may undermine uniqueness and competitiveness. **Key findings** of the 4WR Full Report help developers, managers and policy makers and others vested in wellness tourism build on or develop individual competitive advantages and as importantly, avoid costly common mistakes.

'Spas are an important part of wellness tourism, but wellness is about much more than just spas' (Global Spa Summit, 2011).

- 1) Wellness goes beyond relaxation and is a key element of lifestyle, which is a significant opportunity for the travel and tourism industry, since people following a wellness lifestyle will look for similar services when they are travelling. Wellness tourism is more than spa tourism and includes healthy cuisine, specific fitness or body-mind-spirit regimes, active-ageing or longevity programmes, learning, adventure, spiritual enlightenment, personal growth and has the ability to enhance lives.
- 2) The industry appears to be dominated by wellness destinations and hotel spas however other attractions and facilities are becoming more popular with consumers (e.g. wellness retreats, outdoor recreational activities, lifestyle centres, thermal treatment centres, etc).
- 3) There will be a proliferation of new, cross-over and fusion services and products which will support the development of wellness tourism in countries and regions that are not yet on the global map of wellness tourism. These need to position themselves in a distinctive way so as not to 'disappear' in a competitive environment. Unique and signature products and services need to be developed.
- 4) Spirituality remains important in countries where there is a strong spiritual tradition (e.g. Asia). However, the growing interest in non-religious spiritual practices in increasingly secular societies (e.g. Europe) means that such products and services need to become more widely available.
- 5) Consumers are becoming more attuned to the importance and value of green, eco, sustainable and organic practices and products. These should become more of a norm than an exception in wellness facilities, and the products and services should merit the 'label'.
- 6) A health focused region has the ability to provide enough variety of services to meet the needs of multiple target segments. One facility cannot be all things to all people.
- 7) There is significant potential in targeting the growth segments identified in this report, namely men, singles, families and youth (Gen Y). Men have different needs and expectations from women. Single people may feel uncomfortable surrounded by families and need tailor-made programmes. Young people have few physical health

problems compared to the elderly. Parents with children need relaxation but can rarely achieve this.

- 8) Evidence-based wellness is becoming more important, i.e. consumers need to know that the treatments or rituals that they are receiving have been adequately researched and are safe and beneficial. This could include healing waters, muds, cosmetics, nutrition, etc. Similarly, wellness practices and practitioners should be regulated properly.
- 9) Wellness tourism tends to be fairly exclusive, especially when it is based on wellness hotels and spas. In the future, there is likely to be a democratisation of wellness (especially if young people are being targeted), for example, budget spas, basic retreats, nature-based activities.
- 10) Wellness tourism is likely to be seen as contributing to long-term well-being and quality of life, especially if there is a focus on the whole person and their entire life-span in the form of active ageing and longevity.
- 11) Travel often affords the opportunity to learn about culture, history and other ways of life which contribute to the overall understanding of human nature and ones place in the world, thus corresponding to intellectual and social well-being.

Key Findings/Recommendations for Planning

- 1) There is a very likely risk that the supply of wellness tourism products and services becomes too standardised. However, 4WR revealed that most regions have a number of unique assets which can and should be developed for wellness tourism. This will help to create unique selling propositions, distinctive brands and competitive destinations.
- 2) Several ubiquitous wellness services (e.g. saunas, massage) may lose their differentiating power and become entry-level services without which no wellness provider can (or should) operate. However, they are not enough to guarantee an appealing attraction and other newer or unusual services should be offered in parallel (e.g. rituals, traditions).
- 3) Operators also need to consider the significance of alternative and complementary medical treatments, especially those which enhance mental and social well-being as well as physical health.
- 4) Natural assets, as the most critical component to wellness tourism product development should be utilized in a sustainable manner, protected by legal arrangements and supported by private and public enterprises.
- 5) Natural healing assets (e.g. healing waters) will (re)gain popularity as evidenced by the growing interest in CAM, Ayurveda, Traditional Chinese Medicine and other non invasive approaches to healing and wellness.
- 6) While not discussed in this report, there is an opportunity to better serve and create specialized products and programs for the aging, for those with chronic conditions and /or disability.

Country Best Practice – Hungary

Wellness Tourism Worldwide identified Hungary as a prime example of the key findings, observations and recommendations outlined in **4WR: Wellness for Whom, Where and What? Full Report**.

Role of Tourism in Quality of Life

The National Tourism Development Strategy stated the following objective ‘tourism should contribute to the improvement of the quality of life of citizens as well as tourists’. Hungary is one of the few destinations where tourism is considered a key contributor to quality of life. As one of the activities related to QoL, the Tourism-specific Quality of Life Methodology (so called ‘Budapest Model’) and Index was recently developed and already applied at various destinations.

Abundant Natural Assets

Health-motivated tourism in Hungary is inextricably connected to its thermal baths and historic bathing culture. Hungary has some of the richest geothermal natural water resources in the world. Bathing culture is nearly 2000 years old, dating back to pre-Roman Celtic times. The Turkish occupation in the 16th century left a legacy of (Turkish) baths in Budapest (Hungarian capital), where about 130 mineral and medicinal springs are located.

Because bathing culture is based on natural resources, thermal and medical tourism have always played an important role in Hungarian tourism, and attracted international medical tourists and domestic tourists. Thermal or medical waters can be found in over 80% of Hungary. Nearly 300 thermal springs are used for bathing and there are 385 settlements in Hungary with healing water. Thirteen Hungarian settlements are labelled as ‘health destinations’. The country offers: 107 wellness hotels, 52 medical hotels, 10 spa hospitals, 8 aquaparks, 5 thermal water caves, 1 mofetta (a type of carbon dioxide healing bath). Natural assets specific to Hungary include the Hévíz natural thermal lake or the Miskolc-Tapolca thermal bath in a natural cave system.

Quality Assurance of Wellness Hotels

Hungary is one of the few destinations that have created a standardization system both for wellness and medical hotels. For years, a Government Decree regulated hotels active in health tourism. Since 2011, the Hungarian Hotel and Restaurant Association is responsible for quality assurance and has developed a set of criteria for wellness hotels. Being part of the Europe-wide Hotelstars Union system, hotels applying to become wellness hotels need to fulfil a series of expectations (e.g. service provision, facilities), which are monitored regularly.

State Support for Wellness Tourism Developments

Over the past 10 years the Hungarian Government identified health tourism as the most important form of tourism. Health tourism developments (e.g. wellness hotels, medical hotels, baths) are supported by national and European Union co-funded sources resulting in dramatic quality improvements and the proliferation of services in almost every part of the country.

Co-Funded Holiday Voucher System for the Improvement of Well-being

According to the Western European model, social tourism typically aims to offer services at attractive prices to as many people as possible. A further objective is to promote authentic tourist locations and to organize sustainable holiday stays which focus on social, learning, cultural and sports components. The state of Hungary historically supported domestic tourists' visits to thermal (and medical) waters, often for several weeks at a time. Holiday vouchers, which are tax-free incentives and are co-financed by the beholder and his/her company, could be redeemed at designated service providers (app. 12,000), many of which are wellness hotels and thermal baths. The travel of disadvantaged social segments (over 100,000 a year) was supported by the system operator. The new SZÉP Holiday Card will provide improved services and easier system management and is expected to increase the number of already app. 1,000,000 beneficiaries.

Hungary has unrivalled natural assets and wellness tourism services. Hungary fully leverages its rich spa history, cultural orientation and natural assets. Both the tourism industry and governmental bodies agree that wellness tourism is the key to the improvement of wellness, well-being and happiness of citizens and visitors, alike.



www.hungary.com

WTW believes that policy makers together with the industry have multi-faceted and multi-level options to make wellness tourism a successful business, a sustainable product and way in which well-being can reach as many segments of the society as possible.

This is the way of achieving the democratization of wellness.

Glossary of Key Terms

Active Aging allows people realize the potential of physical, social and mental well-being. The word active refers to continuing participation in social, economic, cultural, spiritual and civic affairs, not just the ability of being physically active.

Adventure Facilities & Spas are cross-over facilities offering spa-like treatments, healthy gourmet food and an abundance of outdoor activity. Adventure-spa goers are looking 'for learning or advancement in outdoor skills ... and are active vacationers who want a healthy and active' trip. Guests typically want to combine adventurous, outdoors activities by day (e.g. rock climbing, kayaking, hiking, biking, yoga) with pampering spa services and luxury treatments by night (Pascarella, 2008)

Budget Spas are those applying the 'budget' concept (e.g. flights, hotels or cruises) to the world of spas. Budget spas provide basic services for everybody, but then everything else has to be paid for separately, according to what people actually use.

Complementary and Alternative Medicine (CAM) medical and health care systems, practices, and products that are not generally considered part of conventional medicine, i.e. medicine as practiced by holders of M.D. (medical doctor) and D.O. (doctor of osteopathy) degrees and by allied health professionals, such as physical therapists, psychologists, and registered nurses. CAM practices are often grouped into broad categories, such as natural products, mind-body medicine. Practices that focus on the interactions among the brain, mind, body, and behavior, with the intent to use the mind to affect physical functioning and promote health. Examples include meditation, yoga, and manipulative and body-based practices (<http://nccam.nih.gov/health/whatiscam/>)

Corporate/Occupational Wellness (or health incentive), as defined by the National Wellness Institute (2007) focuses on the satisfaction and enrichment that people receive through work. Occupational Wellness focuses on the satisfaction and enrichment that people receive through work (National Wellness Institute 2007), which will go beyond the Fitness Club memberships and will provide, as part of the cafeteria system employees with a wide range wellness-oriented services, many of which will take place as part of a trip.

Dreamscapes are experience factories, which have fantastic, futuristic or breathtaking architecture or location. They have at least one feature which could be described as one of a kind – i.e. THE largest, tallest, and most spectacular, etc. They have the feeling of transporting visitors to another world and completely absorbing them.

Eco Facilities & Spas are cross-over facilities offering the traveller a design and philosophy which complements the rhythms of nature. The treatments and food integrate indigenous plants and rituals (Smith & Puczkó 2008).

Eco-Fit Resorts are resort spas or retreats offering guests with relaxation services and facilities to improve their physical and mental health through nature-based recreation in eco-friendly surroundings. This may include sports or fitness activities ranging from active adventure (e.g. jungle trekking, sandboarding in the desert) to light movement (e.g. gentle swimming or walking). Special nutritional programmes would also be designed using fresh, organic and local ingredients, and all beauty and pampering treatments would also use traditional and indigenous products

Evidence-based Medicine means interventions for which there is proven scientific evidence consistently showing that they improve and how they improve patient outcomes across larger populations

Hol-Life Retreats are retreat-style wellness centres or destination spas where people will go for some time away from their stressful lives and workplaces to recover and refocus on themselves and their needs. These do not merely represent an escape from everyday life, however. Instead, people will undertake a number of courses, classes or workshops to learn how to manage and balance their lives better when they return home. This will include all aspects of life e.g. physical health, social interaction, work-life balance, emotional well-being, and spiritual needs.

Medical Tourism is where people who live in one country travel to another country or travel within their country to receive medical, dental and surgical care while at the same time receiving equal to or greater care than they would have in their own country, and are travelling for medical care because of affordability, better access to care or a higher level of quality of care. (after Medical Tourism Association, <http://www.medicaltourismassociation.com/en/medical-tourism-faq-s.html>).

Medical (Surgical or Clinical) Tourism refers to trips where treatments involve certain operation(s), e.g. dental or cosmetic works, or even life-saving operations.

Medical (Therapeutic) Tourism is somehow different from surgical. It has similar elements, i.e. medical check ups and diagnosis, but its difference lies in the fact that it often requires a long stay or a repeat visit to the destination. Therapeutic tourism tends to use some natural assets that have a healing capacity (Smith & Puczkó 2008).

New Age is a free-flowing spiritual movement; a network of believers and practitioners who share somewhat similar beliefs and practices, which they add on to whichever formal religion that they follow (Religious Tolerance 2006)

Retreats are places affording peace, quiet, privacy, or security and practicing holistic activities

Spas are places devoted to enhancing overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit (ISPA, <http://www.experienceispa.com/spa-goers/spa-101/types-of-spas/>)

Spa-Living Environments (or Spa Lifestyle Communities) are environments where people can move permanently, or temporarily (e.g. to a summer home), which may give boost to time-share developments. Urban dwellers will also have similar services nearby, since more and more spas are developed around urban centres (Smith & Puczkó 2008).

Spiritual and Holistic Tourism focuses on the spiritual quest of the individual leading to transcendence or enlightenment. This may or may not have a religious affiliation, but it is often likely to include rituals, ceremonies, and traditions that are derived from different religions

Thalassotherapy provides services by and services based on the sea. Water, algae and salt are all used in the products (Smith & Puczkó 2008).

Therapeutic Recreation focuses on rehabilitating people with illnesses or disabling conditions.

Quality of Life usually refers to the degree to which a person's life is desirable versus undesirable, often with an emphasis on external components, such as environmental factors and income (Diener 2005).

Well-being is what is non-instrumentally or ultimately good for a person (The Stanford Encyclopedia of Philosophy 2007).

Wellness Tourism refers to trips aiming at a state of health featuring the harmony of the body, mind and spirit, self-responsibility, physical fitness, beauty care, healthy nutrition, relaxation, meditation, mental activity, education, environmental sensitivity and social contacts as fundamental elements.

Wellpitals/Medhotels blend services and qualities of hospitals, hotels and spas. A wellpital/medhotel offers various medical as well as wellness and spa services – without the hospital, clinic or sanatoria, or even a standard hotel feeling and image. This can manifest itself in either the form of an extended spa, modified hospital or even a cruise ship.