

PLANNING AND DEVELOPMENT OF SPA & WELLNESS TOURISM

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Abstract:

Wellness and spa tourism have been growing rapidly in recent years on the global level, with Europe as a key player. This paperwork focuses on the planning and development of wellness and spa resorts and tourism, placing great value on strategic management and marketing in the process of creating unique and relaxing client experiences amplified by authentic connection to nature. Furthermore, the study explores steady growth of wellness and spa tourism in Europe, with special attention to particular countries that have a major role in its constant development. Data obtained in research indicate that wellness concept will be much needed in post-Covid era.

Keywords:

Spa and Wellness tourism, Planning and Development, Strategic Management.

INTRODUCTION

Wellness has been emerging in recent years on the world tourism market as one of the important hotel products. The word „wellness“ stands for healthy state of spirit, mind, and body. In alternative medicine, the term was first used by Halbert L. Dunn, in the mid-1950s. The term wellness became popular in the 1970s, when the American National Wellness Institute in Wisconsin defined it as an active process essential in making decisions towards successful existence (Zimmer, 2010). Wellness focuses on minimizing three aspects of stressors: physical (which damages nerves), chemical (creating toxins), and mental (hormone problems). The same thing claims Vitner et al. (2012) that wellness is a complex concept, which includes few elements of life such as: physical, mental and spiritual well-being. Based on facts, wellness can have very useful effect for human mind and body; it ensures the preservation of health and a higher quality of life of the population (Kasagrande and Gurnák, 2017).

The term “wellness” actually represents a certain way of life, in which people, through their own choices and decisions, contribute to the development of their health and overall life (Rančić, 2019). By embarking on a wellness (healthy) lifestyle, where harmony of body, spirit and mind is achieved, and the experiences gained in wellness

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tourism represent much more than just a trip, they contribute to self-satisfaction in self-awareness (Cederström and Spicer, 2015). Wellness tourism, therefore, provides opportunities for a variety of activities, which can be realized in everyday life and during tourist trips (Kirkland, 2014). This, of course, applies not only to spa and health resorts, but also include coastal, mountain and city centers (Hoeger et al., 2018).

Also, wellness programs are an essential segment of wellness tourism. The goal of a wellness program is for people to have enough energy for daily life activities to generally feel good (Edlin and Golanty, 2015). Wellness programs also allow individuals to take greater responsibility for their health (Mattke et al., 2013). Private wellness programs exist to improve the rate of health, reduce and eliminate smoking, and regulate body weight. Furthermore, wellness programs, nowadays, are recognized by an increasing number of companies, in order to improve the morale, loyalty and productivity of their employees (Jones et al., 2019). Programs in wellness tourism are primarily related to beauty programs, which is a very broad concept, as well as the availability and use of swimming pools, saunas, gyms, relaxation and consumption of healthy food and drinks (Cvikl and Meknic, 2011).

Wellness concept is closely related to spa. The term “spa” derives from the abbreviation “salus per aquam” which means “water to health”. This term is used in most definitions with the term water, according to the above abbreviation (Cristian-Constantin et al., 2015). Out of the many definitions of this term, it is necessary to single out the one of the International Spa Association (ISPA) which describes spas as “places focused on improving well-being, providing professional services aimed at rejuvenating the body, mind and spirit” (ISPA, 2013).

LITERATURE REVIEW

Wellness tourism, as an essential segment of health tourism, came to life in Europe in 1989, when the Austrian spa Bad Hofgastein used the term “magic wellness” in its brochure. In Europe, wellness tourism began to develop rapidly in the 1990s, especially in Austria, Germany and Switzerland. Then, health insurance began to cancel the financing of health-tourist stays in health resorts. In order to survive on the market, spa and health facilities had to introduce changes in their offer, in order to satisfy the requirements of the guests, who paid for their stay (Csirmaz and Pető, 2015). Guests began to expect a higher level of hedonism and individual attention, in addition to the classic medical and hotel services (Voigt and Pforr, 2013). It is for this reason that the concept of wellness tourism appeared, which soon expanded beyond the classic health resorts, because in a way it became a trend (Heung and Kucukusta, 2013).

Mueller and Kaufmann (2001) believe that “wellness tourism is a set of all associations and phenomena, resulting from travel and stay of people, whose main motive for travel is maintaining and promoting health”. According to Vitner et al. (2012) wellness tourism simply implies as a universal offer of conditions and procedures for achieving the excellent spiritual and physical maturity of an individual, for which the term wellness is commonly used. Ivandić et al. (2016) have similar opinion that wellness tourism refers to tourist trips motivated by the desire to achieve physical and spiritual balance through the organized application of energy and health programs, preventing possible diseases.

Wellness tourism, as a part of health tourism, nowadays records vigorous growth in Europe (Gudelj, 2019). It is inevitable that good health is necessary aspect (or a prerequisite instead of necessary aspect) for normal human function and thus normal life activities (Rančić et al., 2014), therefore there is a more pronounced concern about appearance, diet, exercise, etc. Because of previous-mentioned reasons, many tourist facilities and destinations provide conditions for preserving and improving health (Ivandić et al., 2016).

Health tourism as an indispensable sector of tourism, aims to advocate, sustain and accomplish physical-mental state, using healing elements, health-sport services, where these visitors-guests stay outside their place of residence (Jovičić and Hrabovski- Tomić, 2009; Gligorijević and Novović (2014)). Additionally, health tourism includes medical and wellness tourism (Muić, 2019). Medical tourism consists of people who travel to a destination for the treatment of a certain disease, undergoing some medical treatment or surgery, then because of the need for dental services, etc. According to Racz et al. (2021) health tourism consists of five elements: sun and fun movements, interesting activities such as: sports, gym, biking, running etc.; travel for health motive; travel for spa enjoyment- massages, pool activities combined with other fun elements.



Next to wellness tourism, the modern concept of a spa center includes a diverse offer of its services, which positively affect the psychophysical health of its consumers. This can be done by various recreational programs, cosmetic treatments, medical services, counseling on nutrition and other topics, stress management techniques, spiritual and educational upliftment, etc (Ashton and Klinhom, 2020). Spa centers are created and opened in various places, such as mountains, coastal places, cities, rural areas, islands, etc., which generally have the potential to meet all the needs and requirements that affect the achievement of general well-being (clean air and natural environment, healthy diet, etc.) (Smith and Puczkó, 2014).

Some of them specialize in a certain type of services, but all spas are connected to wellness, ie. support the main idea of wellness, the idea of achieving balance of body-mind-spirit, through healthy life choices (Berber et al., 2010). Many authors researched spa tourism topics: Han et al. (2020) researched quality of wellness tourism in Thailand; Hashim et al. (2019) researched what motivated tourists to visit wellness and spa destination; Csirmaz and Pető (2015) wrote about global trends in recreational, spas and wellness tourism; Voigt and Pforr (2013) discussed wellness tourism in general; Milicevic et al. (2013) researched topics on wellness tourism in Serbian spa tourism; Beganović et al. (2021) addressed the topic about medical spas and modern spa facilities in Bosnia and Herzegovina; Jakšić Stojanović et al. (2019) researched trends in health tourism trends in Montenegro.

Authors Smith and Puczko (2009) are predicting further development of health-spa-wellness tourism industry, which will be based on the following concepts:

- ◆ **Wellpitals** - a mixture of hospital and wellness;
- ◆ **Spa Living Environment** – more and more spas are developing around urban centers, allowing people to use spa services (Csirmaz and Pető, 2015);
- ◆ **Eco-Fit Resorts** – relaxation and improvement of physical-mental state health through activities in the natural environment (Quintela et al., 2010)
- ◆ **Dreamscapes** – Bright future of health-wellness tourism will be very attractive for visitors who are attracted by a completely different world, with a fantastic and beautiful spa architecture and a suitable location. (Kazakov and Oyner, 2020)
- ◆ **My Spa** - this is more about lifestyle than tourism (Nair, 2020)
- ◆ **Hol-Life Retreats** - wellness and spa facilities, where people go for a short break, where they are away from the stressful life and workplace, in order to relax, recharge and enjoy themselves. (Silva and Mayer, 2021)
- ◆ **Well Working** - Business wellness is already familiar concept for the majority of companies (Bushueva, 2020);
- ◆ **BudgetSpas** – Creating a “budget” for the service (i.e., fleets, hotels or cruises), i.e., budget spas, which will provide services to everyone, where people will pay only those programs they use at low prices (Sawicki, 2014).

Selfness is a new variant of wellness where, in addition to caring for the body and physical well-being, the emphasis is placed on the inner fulfillment of guests, i.e., the establishment of a balance between life and work. The most important goal of the selfness program is for people to improve their quality of life by using some of the services offered to them (Smith and Puczko, 2009).

Wellness tourism industry is in close correlation with health and spa facilities, along with outdoor activities (Kulczycki and Lück, 2009). Location for the development of wellness tourism should be special, with natural environment setting and easy way to access (Moscardo, 2011). It is particularly important for creating unique, relaxing, multi-sensory experience also known as a customer journey, which is according to Haven et al. (2018), the key to success for spas. Moreover, management should bear in mind that all spa activities, spa packages (including healthy quality food and drinks), products and services need to be priced differently in regard to size group, length of visitors stay, etc. (Masiero and Nicolau, 2012). In addition to this, spas should retain their authenticity, which is very important for the value of wellness tourism. For wellness experts, authenticity is not only about facility size, fitness offering, treatment menus or interior design - additional components such as food should also be given close attention. According to Zrnić et al. (2021), authenticity of food, particularly traditional food, should be preserved as it helps positioning the destination on global tourist map.



Planning and development of spas and wellness tourism destinations must be clearly organized and in accordance with the latest clients demands, which include modern development of spa facilities and patterns specifically designed for spa centers (Sibinović and Belij, 2010). Also, best tool for wellness destination planning and development is promotion alongside with information channels (Sharifpour et al., 2014). Among the first steps that the developer of a new spa center or wellness resort has to take is preparation of market study and financial projections, which is most likely to be created by a consulting firm and further refined by the management of the company. Many consulting companies agree that when it comes to spa and wellness development, strategic planning, clear vision, identification of customers and competitors and creating value proposition would be the most important steps. In addition to this, throughout all phases of planning and development, following three pillars are crucial: business and financial planning, human resources management (recruitment, trainings, handbooks and manuals), and site development. As globalization has intensified competitiveness between tourism regions and destinations, Gross (2015) claims that strategic management is one of the key factors to secure competitive advantage on the market. According to Stanković and Đoković (2019), strategic management is often replaced by strategic planning, but planning is the very first step of the process in which goals and objectives are defined. Robbins and Coulter (2012) listed all the activities of strategic managements, as follows: vision, mission and goals identification, external and internal environment analysis, strategy defining, implementation and control. In opinion of Schweder and Leung (2016) who researched wellness resorts opposed to traditional ones, these are four important aspects when planning wellness resorts:

- ♦ It has to provide alluring experience to guests, by integrating facilities, service platform and design;
- ♦ All services need to capture rate of guests;
- ♦ Design of resort needs to be in harmony with nature, to provide authenticity and local culture (including sustainable design);
- ♦ It differentiates from traditional resorts in terms that investment at the beginning will certainly lead to greater loyalty rate and bigger average spending.

When discussing wellness centers planning, Čerović and Čomić (2013) make distinction between pools and spa facilities, providing clear guidelines for successful planning of both. According to the same authors, pools need to be properly positioned, safe and sun-oriented, strictly following standards and current laws in relation to their size, depth, temperature and cleaning, while in spa planning, following steps should be taken into account: position (guest should be able to get directly to spa and not by walking through lobby), services (reception, showers, lockers, toilettes, gym, jacuzzi, saunas), space planning (visible position, separated from other facilities). To become more competitive, spas also need to pay attention to global trends, wishes and desires of guests, which requires new directions in strategic marketing and in turn can lead to more guests, and thus more profit (Perić et al., 2017). According to Đoković (2018) strategic marketing implies that long-term marketing decisions are made, arising from vision and mission of the company. With regard to wellness and spa marketing efforts, marketing research followed by clear plan and its timely execution is essential. It is crucial to go beyond traditional marketing, as it only considers the cognitive aspect and is used to evaluate the experience, while expectations as well are being part of the experience (Trisca, 2017). When creating marketing plan for spa and wellness resorts, both target audiences are important – internal and external, so different tools and channels should be considered such as e-mail marketing (in line with GDPR where applicable), social media, review and booking sites such as Trip Advisor and Booking.com, theme event organization, advertisements, advertorials, partnership with tour operators, cooperation with influencers, etc. Internal marketing is particularly relevant in creating special offers and packages where spa experience is added to guest's accommodation, which is a way to get guests familiar with spa facilities. The synergy between all the previously mentioned elements can greatly help the development of spa and wellness tourism.



METHODOLOGY

The main focus of this research is the development of European spa and wellness and its market value and share. This study used mixed methods including deduction, to collect, compare and discover data on wellness tourism. Also, a qualitative and quantitative approach as well as descriptive statistics, helped the authors to obtain the necessary information. Further data were gathered from relevant secondary sources, such as: magazines, journals, books, articles, websites, etc. In general, publications from 2010 onwards have been used as a criterion to mitigate the current situation regarding the development of spa and wellness tourism. All collected data are presented in the form of tables and text.

RESULTS

Research study by Global Wellness Institute (GWI, 2018) puts Europe as a leading wellness destination globally. Table 1 shows the picture of wellness and spa economy for period 2015-2017. According to data in Table 1, spa economy in 2015 was close to \$99 billion, with 2.65% global wellness share, with worth estimation of more than a \$3 billion. Furthermore, in 2017, the spa economy worth was estimated at approximately \$4,220.2 billion, with 2.82% global wellness share. Comparing the previously presented data, we can see modest growth rate. Further comparison of data shows a bit higher rate 9.8% of global spa economy, and 6.4% global wellness growth rate.

Table 1. Global market scope

Tourism component	Market Size (Billions of US \$)		Average Annual Growth Rate
	2015	2017	2015-2017
Year			
Global Spa market	98.6	118.8	9.8%
Global Wellness market	3,724.4	4,220.2	6.4%

Source: Global Wellness Institute 2018

Table 2 shows data of spa and wellness economy in Europe and the rest of the world. As in the previous section, the comparison period is 2015-2017. Presented data show growth and demand for spa industry in Europe in comparison to other non-European countries.

Table 2. Europe market scope

Tourism component	Market Size (Billions of US \$)		Average Annual Growth Rate
	2015	2017	2015-2017
Year			
Spa-wellness market in Europe	30.25	33.3	10.1%
Global Spa-Wellness market	98.6	118.8	9.8%

Source: Global Wellness Institute 2018

Analyzing the data presented in 2015, we can see that spa tourism in Europe is worth approximately \$30 billion, with an estimated value of \$98.6 billion. Furthermore, in 2017, details are slightly better with 33.3 billion / 28.03% share of global spa economy/118.8 billion estimated market value. These results show that Europe spa and wellness economy progress rate was 10.1%, in comparison to the 9.8% global wellness-spa economy situation.



According to Mainil et al. (2017), health tourism market share in EU countries is 4.3%. Also, major EU leaders in health tourism are Germany, France and Sweden (56% of all arrivals, 58% of all departures). As health tourism is the combination of medical, spa & wellness tourism, it is an interesting fact that with 2/3 to 3/4 of overall market, wellness tourism clearly leads by EU health tourism countries (Mainil et al. 2017). Furthermore, health-tourism revenues total \$46.9 billion in the EU, and more than three quarters of them are generated by five countries: Sweden, Germany, Italy, Poland and France (Mainil et al. 2017).

These findings are not much surprising, given the fact that wellness tourism development is determined culturally and geographically to a great size, and above-mentioned countries are in that sense very specific. According to Smith and Puczko (2014), wellness in the south of Europe is closely connected to the sea, a moderate life and vibrant Mediterranean nourishment, while wellness in Scandinavia is based on the outdoors activities, movements like slow pace walking and relaxing in pool, etc. All of it makes Italy a perfect destination for sea and wellness enthusiasts, and Sweden a good choice for mountaineers, sport and wellness fans. Smith and Puczko (2014) further argue that Germany, Austria and Switzerland, positioned in-between the Mediterranean and Scandinavia, practically combine elements specific for northern Europe, such as physical health with slower pace that is characteristic of the south of Europe, creating in such a way unique wellness tourism. As for Central and Eastern European countries and Baltic States, they are more oriented towards medical sources and water, thus attracting a specific group of wellness enthusiasts.

According to Costa et al. (2015), several destinations within Europe are market leaders in thermalism (thermal wellness), while Araujo et al. (2015), claim that accompanied industries such as beauty salons are also dominant in European countries. In the study conducted by Yeung & Johnston (2017) a number of EU countries including Germany, Slovenia, Austria, Spain, Italy, Hungary and Poland are positioned among the top ten of the thermal springs market, which comes as no surprise bearing in mind a long-established European tradition of wellness and spa tourism. With respect to it, numerous classic wellness/spa resorts such as Balkans, have a very big tradition in herbal/plant medicine, beautiful natural environment and favorable climate (Kiss, 2015). The Balkans is rich in natural resources (sea coasts, mountains, thermal water, forests), but due to low budgeting in the region, new developments such as wellness hotels and leisure spa will likely focus on foreigner paying visits, who consider services as cheap and exotic (Kiss, 2015).

Regarding the natural beauties and resources, Perić et al. (2017) have the same opinion about Serbia, stating that it has enormous potential in spa tourism, including more than 50 spas and 500 thermal springs, not to mention natural gas resources and mineral mud. According to Mainil et al. (2017), in Croatia, an EU member state will focus on establishing minimum standards for wellness and health tourism centers, while strategically networking with internationally recognized providers of services in health tourism sector.

As Yeung & Johnston (2020) stated in their study, the rapid growth of wellness tourism lately is a proof of rising demand for and profitability of healthier travel experiences. Although Covid-19 pandemic heavily impacted many industries, particularly tourism, the study argues that in coming years the human desire to travel will remain strong, even intensify - specially the desire for wellness-enhancing travels that inspire awe, wonder and connection. It is indicated that wellness tourisms in post-Covid era have a bright future ahead.

CONCLUSIONS AND DISCUSSION

The world of spas and wellness tourism is growing fast and expanding with new offers every day. Wellness tourism has a lot of potentials. Although, last two years were very challenging for every industry, especially tourism sector due to pandemic Covid-19, today's time is very uncertain what needs to change in order to continue spa and wellness development. Also, wellness and spa should be in line with global trends and desires of current and potential clients, so that they can provide them with authentic client journey that will motivate them to repeat the pleasant experience.

According to the available data, Europe is a leading player on the global wellness map, with great contribution of Germany, Italy, France, Poland, Slovenia and Sweden. The Balkans is perceived as an area with a lot of wellness potential, mostly thanks to its natural beauties.



In order to progress, spa and wellness facilities need to adapt, change, pause and move quickly with old/new services and products, new marketing strategy new strategic planning, making sure that guests health and safety are on top of their business list. People will need spas and wellness services especially after recovery from global situation.

It is important to note that this study has some limitations, as most of the data presented were collected prior to Covid-19 pandemic. With respect to that, it is recommended that future research of the wellness tourism focus on current trends and empirical findings related to the post-Covid wellness era.

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