

Well-
being in
Leisure
&
Tourism

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This paper explores the concept of well-being – its makeup, the relationship of its main components, trends in well-being and its relationship with consumers.

**For the Body,
Mind & Soul.**

Table of Contents

Well-being in Leisure & Tourism.....	3
Introduction	3
Learning Points.....	5
The Concept of Well-being	6
The Growth of Well-being Tourism.....	6
International Well-being Tourism Growth	8
Factors Behind the Growth in Well-being Tourism	10
What Consumers Look for In a Well-being Holiday.....	14
Who is the Health and Well-being Customer?	15
What Constitutes a Well-being Holiday?	17
Well-being Tourism & Scotland	18
Opportunities.....	18
Well-Being Certification.....	19
Well-ness Destinations in Pictures	21
Ebner’s Waldhof am see.....	22
Grand Regina Alpin Wellfit Hotel	22
Benefits of tourism to the Wellbeing of the tourist destination.....	22
What are tourist businesses emphasising when marketing the concept of well-being and what specific innovations are taking place?	22
It’s notable that the Beardmore hotel in Clydebank, Glasgow once offered a whisky spa, but an on premises spa no longer exists.	23
The Future of Well-being Tourism	23
Appendix	25
Appendix #1. Best Practice Case Study – “The Feel Good Place”	25
Appendix #2. Best Practice Case Study. The Island of Wellbeing.	26
Appendix #3. Love Cyprus. The Official Portal of the Cyprus Tourism Organisation. 2008.	26
Appendix #4. Well-Being Activities.....	27
Appendix #5. Summary of market factors impacting on the Health & Well-being Tourism Market. Taken from Proseed.....	29
Appendix #6. Trends In International Spa tourism. Taken from Tourism Victoria (Australia).	30
Appendix #5. Spa & Wellness Treatments.....	30
Appendix #2. End notes.	32

Well-being in Leisure & Tourism

"We are desperate to find an oasis, a place where we can be at peace, breathe deeply, regain our internal balance, re-establish the harmony between our body, mind and soul so we can confront this fast-paced, complex and increasingly scary world of ours another day. But we are no longer prepared to make big efforts and huge sacrifices to look and feel better, as we were told we had to do only a decade ago. The time has come to be kind to ourselves: to strive for balance, harmony but also pleasure. Welcome to the wellness revolution!" Marion Joppe, Director at the University of Guelph's School of Hospitality and Tourism Management.

Introduction

Although the globe is currently embraced in a boom of "Wellness tourism", arguably, this is one of the oldest forms of tourism. Examples date back to the "scrupulous attention paid to wellbeing by Romans and Greeks, the quests for spiritual enlightenment of Mediaeval Pilgrims, or the medical seaside and spa tourism of the 18th and 19th Century European élite".

"The proliferation of wellness centres, holistic retreats, spas, spiritual pilgrimages, complementary and alternative therapies is unprecedented. Not only are many people increasingly concerned about their physical, social and psychological wellbeing in their everyday lives, but they are also prepared to travel long distances to experience different forms of wellness tourism."

This paper offers a definition for Well-being tourism, reasons behind the trend in growth of wellness tourism services, UK and International views on Well-being related to tourism, a future likelihood for well-being within tourism, among other items of interest. Note that wellness and well-being are terms used in an intersperse way.

This paper's learning points lead to important questions for Morayshire tourism. These include:

1. Given the rapid and global growth in health and well-being tourism, what strategy has Morayshire adopted to ensure they are in a position to compete for changing tourism trends that include a desire for health and well-being aspects to holiday travel?
2. Given the wealth in Morayshire assets, including rich history, the natural world, industry brands, emigrants world-wide and others, what is the region doing to bring these assets together to create an unparalleled health and well-being holiday destination?
3. How does Morayshire intend to market its current health and well-being holiday options within the global marketplace while simultaneously undertaking further development of the regional tourism industry to strengthen its health and well-being tourism product.

Learning Points

- Emphasise the locality of well-being, and in particular specific local environmental factors that can be marketed. Also, that may include types of gastronomic delicacies including the way in which food and drink is prepared.
- Emphasise the standards based quality approach of well-being such as official designations for high quality like the “Alpine Wellness International” designation. Deutscher Wellness Verband, an expert on well-being tourism and standards advisor “is convinced that quality standards will help the current atmosphere of growing competition in the field and in the offer of cheap stays in faraway destinations, not only for customers, but also hotel owners in becoming oriented in the wide selection of wellness products”.
- There may be “partnership” opportunities in terms of emphasising other quality designations into a well-being destination management approach. For example, certified organic local produced used in gastronomy, Michelin star restaurants as an indication of quality food, awards in architectural design that emphasise relaxation and/or meditation, officially protected forested areas/nature reserves, among others.
- Emphasise the well-being strategy and demonstrate that the destination has a well thought and executed plan that tactically ensures attention to detail for various events and components that result in a “well-being experience”. This appears to be an ever popular concept within developing sustainable tourism.
- Emphasise the cultural aspects of well-being such as the manner in which the local community go about their daily lives and how the experience is “prepared”, be it the gastronomy, activity lessons, sporting events and the like. For example, a town may want to explain its relaxed “laid back” lifestyle and gentle way of treating its fellow citizens, wilderness, up-bringing of children, etcetera.
- An environment characterised by inexpensive flights, holiday package deals and “competitive overseas offerings provide direct competition to domestic offers”. This competitive state requires the experience to be an affordable one as “consumers seem to be prepared to pay from less than £100 to over £200 per person per night for a weekend package including the option of 2 activities or treatments”. It is important to ensure consumers understand what benefits and features they will be attaining for their money in advance of booking.
- Ensure a well-ness holiday can be both easy to find and book. Proceed list this as an essential requirement for businesses within the health and well-being travel market as booking the holiday should be part of the overall wellness experience i.e. stress free. P
- Positioning well-ness holidays in an ever increasingly competitive global environment requires not only offering a unique wholistic well-ness experience, but also includes what other attractions the destination has and how those can be incorporated into an experience. This leads to a need for partnership among both public and private stakeholders for destination tourism management within the well-being concept. “Given that Victoria’s (Australia) key international markets, including New Zealand, Asia, Europe

and North America, have strong spa and wellness product offerings, it is unlikely that spa and wellness tourism will be a single motivator for travel. To attract international markets to undertake a spa experience as a part of their holiday in Victoria, further exploration and development of the State's unique product and experiences needs to be undertaken. It is likely that a spa and wellness experience could be a 'value-add' product for visitors from overseas, and with correct positioning this could lead to increased visitation and length of stay in Victoria".

The Concept of Well-being

Current definitions of 'well-being' encompass both health and mental/spiritual elements, one example being: "the capacity to combine physical, nutritional, mental, spiritual, social and emotional aspects of life in such a way as to ensure positive health and maintain optimum quality of life". This leads to differing viewpoints on what defines Health and Well-being tourism.

The Canadian Tourism Commission (CTC) for example, "supports the idea that health tourism and wellness tourism are two different products". Health tourism would constitute those with medical conditions whose motivation for travel may be to undertake therapies in order to improve their health. Well-being tourism however would constitute generally healthy individuals "who are motivated to travel so that they can experience therapies and activities that will promote, enhance, and otherwise maintain a sense of well being". According to the CTC, "they really are very different needs and are addressed in different ways."

However it has been found in studies that a significant overlap exists between health and well-being tourism, "especially in terms of their markets and in terms of the range of services offered". Furthermore, some experts such as Mary Tabacchi, of Cornell University's School of Hotel Administration, have much simpler definitions for concepts such as health tourism that can cover both health and well being. According to Mary Tabacchi, health tourism is "any kind of travel to make yourself or a member of your family healthier."

Again, although there is no standardised definition or composition, wellness appears to be comprised of four elements. "(1) A lifelong approach emphasizing permanent lifestyle changes; (2) Taking responsibility for one's own actions; (3) Adding to the quality of one's life, not simply extending the length of life, and (4) Making choices that improves an individual's position on the lifestyle continuum". Wellness can be therefore said to have lead to "a more holistic approach to health".

The Growth of Well-being Tourism

As far back as 2000, a House of Lords Report on Complementary and Alternative Medicine noted that “the proliferation of wellness centres, holistic retreats, spas, spiritual pilgrimages, complementary and alternative therapies is unprecedented”.

During the same year STB/Visit Scotland conducted research that indicated “a growing interest in holidays where relaxation and health are the focus as well as a rising interest in well-being holidays”. If we take the largest component of Well-being tourism, Spa visitation, A Topaz Consulting report indicated that “Based upon the reported levels of annual sales, the survey identified year-on-year growth rates of 26% and 28% respectively for 2003 and 2004” within the UK alone.

Visit Scotland’s “The Tourism Prospectus” indicates that health and well-being, along with personal development, unique experiences (individuality), authenticity and safe adventure, was a primary motivating and decision factor for consumers when planning holidays.

Ireland’s demand for health and well-being holiday locations has also shown strength in recent years. Stevens and Associates indicated that “The pace of spa development in Ireland has been dramatic over the past five years” with Ireland’s Fáilte Ireland attributing “its success to basic market forces...investors are responding to what the market demands”.

“The demand for health-tourism services is very promising and has initiated a world-wide mobilisation of health-conscious tourists”. In addition to that point, Proseed include some key statistics within their report on “New Tourism Opportunities for Smaller Rural and Farming Businesses”. “Within the UK there has been a 10% increase in concern over health and appearance between 2000 and 2004, and this is likely to continue, underpinning the UK market”. Furthermore, Proseed indicate that “These trends are borne out by the growing number of activity holidays taken annually by UK consumers”. From an international perspective, “the number of visits made to the UK by overseas residents in 2005 was the highest ever recorded – 30.0 million. The number of visits to the UK doubled between 1985 and 2005, with levels exceeding the previous high in 2004. The number of visits abroad made by UK residents has more than tripled since 1985, to a record 66.4 million visits in 2005” (National Statistics).

It is also worth noting that spending – at least from a UK outbound tourist perspective, has increased in real terms by 6% between 2004 and 2005. This would appear to indicate a greater propensity to spend and therefore lead one to speculate on opportunities within well-being tourism to capitalise on that increase in real spending. However, although 2006 “was another very good year for tourism...for Europe and the rest of the world” the European Travel Commission’s outlook for 2007 was that a slowdown in traffic growth rates and less buoyant global economic outlook would negatively affect travel growth. However that is not to say growth will not continue, but more likely at a slower pace.

As will be mentioned later in this report, improvements in travel infrastructure and affordability have combined to facilitate travel in general as well as health and well-being related travel.

Outside of the UK, numerous countries have been extolling the growth of health and well-being tourism.

International Well-being Tourism Growth

International airline passenger traffic at ACI airports worldwide, 2006

Region	Passengers ('000)	% change 2006/05
Africa	68,140	6.9
Asia Pacific	351,432	8.7
Europe	927,547	6.5
Latin America/Caribbean	84,311	2.1
Middle East	81,441	10.4
North America	184,126	2.9
Total	1,696,997	6.5

Note: Data based on results filed by 581 airports worldwide

Source: Airports Council International (ACI)

Ian Yeoman in his paper on the changing definitions of luxury within holidays indicated that health and well-being holidays are popular beyond Europe's borders. He mentions that "One of the biggest trends sweeping Japan presently, are instant detoxification diets and stress free weekends, in which high powered executives escape the maddening crowds of Tokyo for rural settings, in spiritual hotels, where they listen to light music, eat no food but drink green tea and mineral water. There isn't a blackberry or mobile phone in sight."

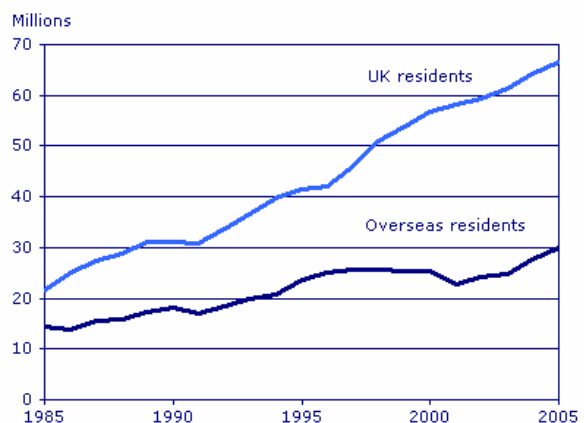
In addition to Japan, "The Philippine government has recognized the potential of the Health and Wellness Tourism industry in job creation and in spurring economic growth".

Ambika Soni, Indian Union Tourism and Culture Minister back in early 2007 indicated a desire to promote India as a "hub of well-being tourism". She stated: "It is not just medical tourism that we want to focus on. I want India to gain popularity as a centre for well-being tourism. I want this message to be spread across the world that doctors in India offer patients a holistic treatment and give medicine with spirituality,"

A further example of burgeoning health and well-being tourism comes from Canada. "The consensus expressed at the 2005 Canadian Spa Industry Conference and Expo in Toronto...was that the spa, and health and wellness industry is booming in Canada, and will continue to do so in the foreseeable. This assertion on the industry's growth potential is in line with statements in this study made by the Canadian Tourism Commission (CTC), and national tourism industry research, which has reported a global and market trend analysis that also predicts a boom in spa, health and wellness vacations".

In Australian, the province of Victoria is also proactively driving a health and well-being tourism strategy. "The emergence of wellness as a global trend appears to be a significant opportunity for Victoria. Wellness retreats such as those offering an intensive program for consumers requiring guidance on diet control, exercise, stress management and detoxification programs, are becoming increasingly important."

Record number of visits to and from UK in 2005



Visits to and from the UK 1985 to 2005

Spa therapy as a form of well-being tourism in Jamaica is viewed as a “window of opportunity” due to increasing demands for this type of activity. “...Most up-market hotels have expanded their services to facilitate guests who now see spa therapy as the deciding factor in a resort vacation, rather than just an additional amenity. Jamaicans are also leaning towards this form of recreational/health activity, resulting in a proliferation of day spas especially in Kingston.”

The global growth in health and well-being tourism and its opportunity for local market engineering is well summed up by Predrag Nenezic, Tourism Minister for Montenegro. “There has been a huge growth across the world in health and wellbeing tourism, and with our outstanding facilities and unique and beautiful surroundings, Montenegro is set to become synonymous with relaxation. We have recognised the demand for this type of holiday and are encouraging investment in this market to ensure that the facilities offered to our visitors are indeed world class.”

Factors Behind the Growth in Well-being Tourism

"Today's health and wellness consumer seeks to look and feel better; to lose weight; to slow the effects of aging; to relieve pain or discomfort; to manage stress; or to partake in the use of natural supplements like vitamins and minerals to improve their health." Indicates research conducted by Spas Ontario. "Today's health and wellness programs respond to the growing consumer demands for fitness level improvement; for healthy lifestyle education; for nutrition counselling; for healing; for preventative medicine; for solving personal problems like stress or depression; and for holistic, naturopathic, alternative or eastern medicinal practices/therapies.

Research conducted in bringing this paper together found that different sources have different theories as to why the market for health and well-being tourism is booming. Most of those reasons encountered have been included below. It's noteworthy that certain reasons for health and well-being tourism growth are due to local cultural, socio-economic and other factors. For example, nation-wide challenges with obesity and government policy to combat this growing problem in the UK is helping to foster the growth of health and well-being tourism.

Some sources in research go so far as to "cite the anomie of Western, Capitalist societies, the breakdown of traditional religions, and the fragmentation of communities" as reasons supporting the growth of health and well-being tourism. In perhaps a more straightforward manner, this type of tourism is offering a new and complimentary way of helping to treat people, including those with mental, psychological and emotional problems in addition to new psychotherapies. This of course being more of the health side to health and well-being tourism.

An Industry Canada report credits spa industry growth in Canada down to rising stress levels and "aging baby boomers (who) increasingly rely on diet, exercise and spa treatments to remain youthful and healthy".

Of the various reasons for the marketplace growth, stress and the desire to live healthier are the two overriding reasons being provided by researchers.

1. The stresses of modern day 24/7 society are singled as a main culprit in driving well being holidays. According to the study by STB/Visit Scotland "Respondents described their lives as increasingly hectic and stressful due to the faster pace of modern life, with people generally working longer and

Combining the consumer's quest for health and wellness with travel, leisure, and fun (products of the travel industry) is, "simply stated, spa, health and wellness tourism." It follows that since people take part in recreational, cultural, and entertainment and educational activities while on vacation, that "tourism is a perfect vehicle for promoting wellness". A Feasibility Study for a Yukon Health and Wellness Tourism Industry (2005). Pg 16.

harder hours along with decreasing job security". In addition to stress, an RSPB report indicated that "Depression and depression-related illness are predicted to become the greatest source of ill-health by 2020". Combating the negative effects of stress and other psychological ailments can be accomplished partially through a variety of active and passive relaxation techniques with holidays being singled out as an important means of "keeping stress in check".

2. People are showing "a growing desire to live longer and live healthier" according to Proseed. Challenges to overcome however include "The rise of obesity, coronary heart disease and respiratory ailments due to a more sedentary life style, higher stress levels and poorer diet has made health an increasingly urgent issue for all". Studies have shown that as few as "1/3rd of adults take 30 minutes of moderate exercise 5 times a week, yet this reduces morbidity rates by 30-50%". In the UK, inactivity costs over €11,700 million a year according to an EU report entitled "Well Being Through Wildlife in the UK". Therefore, opportunities exist for facilitating people's desire for longevity and the need to combat inactivity. This includes an element of the consumer market who require "Assistance to bring about lifestyle change...(by those) who are endeavouring to reassess their lifestyle in order to prevent health problems developing later in life".

It is interesting to note that the current labour government has abandoned its target to halt childhood obesity by 2010, setting instead the goal of reducing it by 2020 - a decade further on. This change in government stance was the result of the Foresight report, "a two-year trawl through the evidence by scientists which concluded that the problem was huge, could cost the UK £45bn a year and could take 30 years to turn round". The government clearly could use help in reaching its obesity targets and the tourism industry via Well-being holidays may help the government toward achieving the targets.

In addition to modern day stress and the desire for increased longevity, Proseed Consulting has highlighted other important factors driving the growth of well-being tourism, especially those specific to the UK, included below:

3. Government Policy to Promote Health and Well-Being – Nature not only has been shown to help motivate physical activity, but it also affects our psychological welfare. The Government White Paper on Health and integrated Physical Activity Plan is an example that emphasises "the need to improve the physical and mental health of the population, notably through developing new approaches that re-engage consumers". This filters to the industry level through initiatives such as the Natural England agency recreational strategy that attempts to "identify the importance of connecting people, places and nature to benefit individual well-being, for the health of the nation, and for the health of the natural environment".
4. Government Policy to Promote Diversity and Access to the Countryside for all – increasing access to the countryside for all, is a UK government goal, an example being the Welsh Assembly Government, which "is keen to provide access to the Welsh countryside and coast for everyone". According to the RSPB, "A large number of studies illustrate how nature helps recovery from stress and attention fatigue, and that the mental, physical and socio-

emotional development of children may benefit from direct contact with nature". The Welsh Audit Office recently commissioned a study examining a) "how effectively the Welsh public service has worked collaboratively to increase responsible public access to the countryside and b) to consider what lessons might be learned for the future implementation of extended public access to the coast. The report concluded that the Assembly Government and our key public sector partners have successfully and effectively implemented the provisions in the CROW Act (Part 1), delivering a significant amount of land for public access in Wales (21% of the land area of Wales)."

5. Increasing Media Interest – highly public initiatives from government and private sector sources such as Jamie Oliver "is leading to greater public awareness and action." As examples, education secretary Ruth Kelly announced that an extra £235m would be invested in improving meals over the next three years with a School Meals Review Panel created to assess the state of the current service. Furthermore gym memberships have shown an increase 25% since 2002. One in three people successfully changed the amount of exercise that they did in 2004 (1 in 5 tried but failed)".
6. Increasing age of the Population – "The UK's population is ageing. Although the population grew by 8 per cent in the last thirty-five years, from 55.9 million in 1971 to 60.6 million in mid-2006, this change has not occurred evenly across all age groups. The population aged over 65 grew by 31 per cent, from 7.4 to 9.7 million, whilst the population aged under 16 declined by 19 per cent, from 14.2 to 11.5 million". "(Baby) Boomers' interest and desire for travel opportunities that also meet their health needs is becoming a market force that greatly influences the development of this tourism niche market. In fact, Boomers already represent 60 percent of the spa market." "Today's ageing population is healthier, more active and more influential, and there is a higher disposable income amongst them. They are looking for products that will help them maintain their youth, feel better, preserve their looks and increase longevity."
7. Frequent Travelled Consumerism – the increase in well-being tourism is partially due to a growth in frequent travellers who "seek something new and different in a holiday experience. They often want something educational or experiential, and many aspects of health and wellness tourism also fulfils those requirements".
8. Improving Transport Links – the globe is becoming increasingly accessible. In terms of the UK, this past December London's mayor Ken Livingstone promised £3.3 million to improve transport links around the borough. In Scotland, the Highland Council has invested in two new rural transport services that "will give residents in the Aird and Muir of Ord/Beauly areas much better access to local shops and services and connections to main bus and train routes". According to Proseed, "There is also a significant policy towards initiating sustainable transport initiatives in the Areas of Outstanding Natural Beauty (AONB) within the South East. Examples include the Surrey Hills Explorer bus for visiting key sites and National Trust attractions within the Surrey Hills AONB, the Devil's Dyke bus in the Sussex Downs". Even in the remotest of destinations such as Mongolia, the Asian Development Bank was involved in promoting "regional cooperation and sustainable economic growth in Mongolia through a US\$37.1 million loan approved today to strengthen

transport links to neighbouring countries". It is the improvement of transportation links that is "driving the demand for short breaks and quick fix experiences".

9. Increasing Availability and Quality of Information – the internet has been a key factor in educating people about the availability of well-being tourist destinations world-wide. New media forms and new services within various forms of media are offering greater planning. Transaction based internet and mobility services are allowing tourists to book holidays and therefore helping them to better plan for well-being holidays. "Better information can motivate, educate and encourage people to visit new places. Improvements in the clarity and accuracy of information (including the use of the internet) increases awareness, and allows for a more experimental approach by consumers, inspiring confidence and empowering them to try new experiences and activities". Furthermore "Better information additionally serves to educate people about perceived dangers and so defuse the effect of the risk averse society which dissuades people from participating". An example of an effort in servicing the well-being tourist is RelaxFrance.net and RelaxEngland.net, which are a joint Interreg-funded web initiative (web portals) from Tourism South East (UK) and Nord and Pas-de-Calais (France). The project reciprocally targets the burgeoning wellbeing tourism market in each country and highlights therapeutic short breaks available in the region.
10. Tourism Industry Coalitions. Partnership within the tourism industry is helping to foster more strategic plans and developments in well-being tourism. This is likely to have a greater positive impact in attracting greater tourism numbers. "Florida, Arkansas and Hawaii (United States) are developing strategies to expand their tourism offerings by linking and developing coalitions and partnerships between the health, spa and wellness industries. In Canada, the CTC has launched a Spa, Health and Wellness Task Force for this product portfolio".
11. Proseed have also cited the following items as factors driving growth in well-being tourism:
 - "Increasing Education Standards – driving demand for more specialist products and the more prominent inclusion of elements relating to nature, the countryside, natural heritage, the arts, culture and history.
 - Demand for New and Different Leisure Experiences – Consumers are constantly looking for something new in their holiday breaks but they are also seeking meaningful experiences. 'Wellness' experiences support the trend of individualisation because they help consumers pursue self-discovery.
 - Growth of Corporate Leisure Incentives – With over 91 million working days lost each year in the UK due to mental health problems employers are increasingly offering their staff gift certificates and breaks at spas as a performance incentive.
 - Awareness of World Health Threats – A growing awareness of world health threats such as SARS and Bird Flu, and recent natural disasters have led to a spread of health consciousness which is influencing tourism decision making – particularly destination and type of experience.
 - Changing Tourism Fashion – People want to keep up with the fashion, and the same applies in tourism – tourism fashion. Tourism businesses are creating completely new products, concepts and services that distinguish

themselves from the competition, and health and well-being is in vogue at present.

- Countryside and Rights of Way Act (CROW) – With the high-profile introduction of the Countryside and Rights of Way Act (UK), increased access to the countryside will mean greater opportunities for walking and rambling, thereby drawing in a population which is increasingly attracted to such activities. The CROW Act will eventually open up over 1 million hectares of countryside for outdoor enjoyment, and high-profile promotion of this act should encourage a number of people to take advantage of this opportunity to visit areas of the countryside which were previously off-limits”.

What Consumers Look for In a Well-being Holiday

The Spa and Wellness group have been examining a “range of motivations that drive” well-being tourism. These motivations include the following:

- Medical / cosmetic (e.g. hospitals and clinics)
- Corporeal / physical (e.g. sports, spas, massage, yoga, fitness)
- Occupational wellness (e.g. for business people, such as life-coaching, stress management, Neuro-Linguistic Programming)
- Therapeutic recreation (e.g. rehabilitation, stress and pain management through sport, yoga, creative activities, spas, etc)
- Escapism and relaxation (e.g. beaches, spas, mountains - Alpine Wellness, Thalassotherapy)
- Contemplative / calming (e.g. meditation, Tai Chi, Qi Gong)
- Hedonistic / experiential (e.g. festival spaces, creative tourism)
- Mystical / psychic (e.g. alternative therapies, such as astrology, aura readings, Tarot, crystal healing, angels)
- Existential and psychological (e.g. holistic centres focused on self-development and philosophical contemplation)
- Spiritual (e.g. pilgrimage, New Age events, yoga retreats)
- Community-orientated (e.g. voluntary work, charity treks, holistic centres).

Interestingly, the research undertaken by STB/Visit Scotland showed that “health was associated with the physical rather than the mental, whilst well-being was associated far more with a state of mind”. Since stress affects one’s mental state (eventually resulting in physical related side effects), one would conclude that well-being is of paramount importance in stress relief holidays - at least from the consumer perspective.

For consumers well-being is “happiness”, the opposite of stressed. “Words such as contentment, confidence, calmness and inner peace were associated with well being”. The STB/Visit Scotland study indicated that at least back in the year 2000, its focus groups felt that they did not actively pursue a state of well-being as an achievement nor did they believe that “pure well being” was attainable. However, in a tourist sense, perhaps short term well-being is an achievement.

According to Proseed’s research on well-being tourism, a ‘well-being’ tourism experience will often consist of “a short break, a weekend or night away, in addition

to their main holiday(s)" for many people. This is in contrast to those who may look for immediate well-being results through very short breaks be them half day or less or at the other end of the travel scale weeks. From a business perspective, an important point of note is that "the duration of experience sought frequently correlates to the lifestyle, commitments and stress levels of the individual at time of booking".

It's also important to note that "the varying duration presents an opportunity for those with accommodation, and those providing day activities". "Stressed' executives appear to want 4 or more 'well-being' experience breaks a year, but this is more than the norm". Furthermore, according to a Stevens and Associates/View Marketing report "short break leisure packages will suite the cash rich: time poor core markets".

That report also indicates that a "Key is to achieve a balance of self indulgence, self fulfilment, relaxation and reward". This can be fostered in part by the way in which the business interacts with the client. Proseed indicates that "well-being travel consumers generally are seeking attentive and very high levels of service, without crossing the fine dividing line of being unduly fussed over. A friendly and personal approach is welcomed and visitors need to be made to feel special". In that respect, making someone feel special during a wellness holiday is part of the 'healing' or well-being, certainly from a psychological perspective.

Who is the Health and Well-being Customer?

Research shows that the ABC1 type consumer made up of upper and intermediate managerial, professional or administrative roles constitute the highest value market sector. However all socio-economic groups undertake health and well-being tourism. Proseed cite research by Visit Britain for the 'Just Relax' promotional campaign as having "identified the most affected potential markets (who) are ABC1 couples and singles without kids, ABC1 families with kids aged up to 15 and women who go away with friends". Furthermore, Proseed state: "For two more apparent health and well-being sectors, Mintel has identified the consumer market as follows":

Spa and Beauty Therapy Treatment Seekers

The spa and wellness industry is experiencing rapid global growth, including the development of new spa resorts and hotels and the refurbishment and upgrade of existing spa facilities. "The spa industry, (is) generally regarded as the health and wellness market's largest player" indicates a research paper by Atipol Bhanich Supapol, David Barrows (both of York University, Canada) and Arthur Barrows.

Proseed's report mentions that "the typical spa-goer is traditionally seen as a 25-44 year old female from the ABC1 Socioeconomic group, but new market segments in the broader well-being sector are emerging". "Men still account for a small proportion of numbers but this is growing, and specialist treatments are being designed for the male market". A study by the Topaz Consulting Group found that 70% of UK spa customers were female compared to 30% who were male.

Proseed indicates that "Evidence suggests that older people are less interested in spa treatments. However, the desire to live longer and healthier combined with more free time is resulting in more senior people engaging in spa treatments".

UK consumers make an estimated six million visits to spas throughout Britain each year according to new research undertaken by The Leisure Database Company. Even though the UK Spa industry is claimed to "be in its infancy", Proseed state that "UK spa business operators have seen an increase in sales between 15-20% in the early years of the 21st Century, and this is set to remain buoyant for the medium term".

The Proseed report mentions that over the past 8 years, 20% growth has occurred in the number of spa establishments located within the UK. Mintel research during 2005 showed that three in ten UK adults had a health or beauty treatment in the previous 12 months, spending almost £100 each. That statistic alone placed a £1.45 billion tag on the market within the UK for 2004. "Spas are at the centre of the healthy living revolution but even away from the spa product, the offer of health tourism is developing rapidly".

Despite being places for rest relaxation and pampering, up to 53% of those sites participating in the research had areas set aside for gyms and exercise studios. There is evidence that spa and fitness is coming together in programmed exercise classes and holistic-based activities.

Rapid growth in spas has transcended UK boundaries. North America for example, has seen a surge in the spa industry. "A PriceWaterhouseCoopers study conducted for the International Spa Association (ISpA) found that between 1990 and 2001, the number of spas in the U.S. and Canada grew from 1,400 to 10,900. According to Spa Canada, the national industry association, the Canadian spa industry is growing at an average rate of 16% annually, outperforming such recreational attractions as golf courses, ski resorts and theme parks. Current revenues for the Canadian spa industry are approximated at US\$900 million."

The Pacific Asia Travel Association (PATA) "reveals that 33 per cent of leisure travellers in the US cite access to a spa as an important consideration when making travel plans". It is also important to note that American and Canadian visitors to the UK numbered 4.6 million during 2007 (Oct 06 – Oct 07), so opportunities may exist for targeting North American visitors for spa tourism.

Outdoor Recreation

Research shows that age has a profound impact on both the type and frequency of certain outdoor activities. "Age appears to directly correlate with the degree of interest in a particular outdoor pursuit and the frequency with which they take part. Rambling, for example, is proportionately four times more popular with 45-64-year-olds than it is with teenagers, with the reverse being true of hiking". In citing a Mintel Report from 2005, Proseed indicated that Fell walking offered "the most even age distribution of all outdoor sports studied, while the key demographic for 'other walking activities' is a broad, but generally more aged group of 35-64-year-olds". "Monthly or more frequent participation is dominated by the over-55s, quarterly

participation by the 25-44-year-olds and annual to quarterly participation by the under-25s". This demonstrates the importance of the mature age category to the outdoor recreation industry particularly in the frequency of activity.

What Constitutes a Well-being Holiday?

The study focus groups within the STB/Visit Scotland research identified that well-being activities "consisted mainly of doing things you like to do, with few, if any, obligations and restrictions, whilst ensuring a good mixture of active and passive pastimes".

The study also revealed that "short breaks were thought to be even more beneficial than longer holidays in terms of relieving day-to-day stress". Also, it was noted that the "anticipation" of the travel break was on a par with the actual break itself when attempting to manage stress.

Dr. Brian Hay has noted that the market for health and well being breaks was "not particularly well defined in the UK" and further noted that well-being was often associated with 'health' or 'fitness' rather than being a unique concept. Four types of holiday were classified by Dr. Hay prior to the release of his study in 2001. These were:

1. Spa holidays offering beauty treatments and in pan Europe, emphasising curative or preventative health treatments;
2. Diet and fitness type holidays that focused on goals such as detoxification and quitting smoking;
3. Sport and fitness holidays featuring outdoor pursuits and;
4. Spirituality type holidays centred around retreats and locations that were associated with spirituality.

In comparison, the Austrian 'well-being' holiday model is based upon five key pillars – healthy cuisine, fitness as fun, relaxation, beauty care and personal service.

Proceed list the following themes as desires for the well-being holiday seeker.

1. "A search for tranquillity and calmness – somewhere relaxing and peaceful with links to nature, unspoiled countryside, remote from modern civilisation etc.
 2. A desire for passive activities and experiences that don't necessarily require physical effort, but which help restore mental and spiritual well-being.
 3. A need for physical activities to help improve bodily health and mental alertness.
 4. A feeling of freedom and personal time and space – open space and private areas for example, and few rules, obligations and restrictions.
 5. Provision of high quality food, preferably local, and seasonal.
- Discovering the undiscovered, experiencing the authentic and recharging the batteries of the soul are also desirable objectives from the visitor's perspective."

Well-being Tourism & Scotland

Dr. Hay indicated that "elements of the Scottish product...seemed to fit...with the core elements of well-being". Specifically:

- "serenity, tranquillity, relaxed pace, the ability to create a sense of contentment, ease, peace;
- Activities and natural features that can provide an escape from life's routines, the potential to feel distanced from home and the rest of the country;
- Variety of places and activities – something for almost everyone, friendly, welcoming people; and
- A sense of wholesomeness".

Furthermore, Scotland is a country where those whose definition of well-being holidays include "physical activities, health and spirituality" can fulfil their needs.

Keeping in line with the above elements and Scotland's national growth target of increasing the value of tourism by 50% by 2015, Fife has created a vision. That is: "a place which offers visitors a quick and easy escape from urban living. Fife offers visitors a sense of physical and emotional well-being through the provision of high quality, authentic experiences and opportunities to relax, be reinvigorated (through activities, experiences or the environment), to reconnect and focus on quality of life aspects". This vision will guide Fife to reaching a target of £327 million per annum from a current £218 million per annum tourism spend.

Current trends towards "health and wellness" in Western society are actively promoting values that emphasize a proactive approach where individuals improve and maintain personal well being through a variety of services and activities. In the words of a recent Canadian Tourism Commission (CTC) advertising campaign, these activities "soothe the soul and invigorate the mind."

- A Feasibility Study for a Yukon Health and Wellness Tourism Industry (2005). Pg 13.

Opportunities

1. Marketing Specific definition of Well-being holiday

The Dr. Brian Hay study revealed that health and well-being breaks "were not something that UK consumers appeared to be...familiar with" and furthermore, that negative connotations were associated with health and well-being holidays as focus groups used terms such as "old fashioned" to describe them. Additional associations were drawn with sanatoriums and strict health farms. The main problem from a UK perspective is that "Consumer's impressions of what might constitute a well-being were ill defined".

In contrast, Germans had a more specific definition for a health and well-being holiday. The German health and well-being holiday "entailed staying at a spa resort,

was a necessity rather than a holiday, and would often be partly paid by health insurance”.

2. Scotland – providing indulgence holidays.

The study indicated that “indulgence (pampering, partying, letting your hair down, the ‘craic’)” was an area “lacking in...context”, that being a strength of Scotland for well-being destination.

3. Scotland – targeting the young with a stress relief message.

According to Dr. Hay, offering short breaks emphasising stress relief for a younger target market may offer a way to leverage the well-being concept of tourism. The stress relief holiday should include reward and solutions as sub-concepts. Dr. Hay indicates that focusing on ‘stress relief’ may be more attainable in people’s views that achieving ‘well-being’ under loose UK definition and UK consumer perception. Rebranding in terms of the following is offered by Dr. Hay:

- “something that people deserve for all their efforts;
 - something so good that it will deal with the trials of everyday life;
 - a place so absorbing that it will take you out of yourself; and
 - a place to discover another dimension to your life/something that adds to your life”.
4. A positive message in the combat against obesity and stress across the UK.



According to a Guardian Unlimited news article, “If current obesity levels continue, about 60% of men, 50% of women and 25% of children in the UK will be obese by 2050”. A report by Proseed Consulting indicated that “Stress has reached epidemic proportions and is the greatest health risk in developed countries. More than five million employees in the UK complain of extreme stress in their jobs and around 13 million days are taken each year in sick leave as a consequence”. Therein lies an opportunity to create a sustainable tourist service, by emphasising fitness, health and well-being concepts within a UK based tourism business.

Well-Being Certification

There appears to be little available in terms of quality accredited destinations and businesses offering health and well-being holidays – at least in terms of the varying definition of well-being holidays. One example however is Alpine Wellness International.

Alpine Wellness International’s web homepage offers the slogan “Relax in the Midst of the Alps” along with various pictures of relaxed based activities in an alpine setting. One of the pictures shows a couple in a mountain stream with the

gentlemen refreshingly splashing the stream's water on his face with both hands, providing a sense of purity, cleanliness and health.

What does the Alpine Wellness International designation offer the Adelboden visitor in the words of the Adelboden tourism authority?

"The (Alpine Wellness International) qualification certifies that Adelboden has a comprehensive Alpine Wellness infrastructure and in all areas of Wellness competence scores highly for quality and attractiveness. Of course, the landscape and the abundance of nature play a very important role in our success."

The Adelboden case emphasises not only the concept of well-being as an important selling point, but the village's strengths within the concept of well-being. Adelboden also demonstrates a maturation of well-being into a quality standards based concept with the inception of organisations such as "Alpine Wellness International". The list provided by the Adelboden tourist authority also stresses the merits of locality. That includes food produce, local sites (e.g. Adelboden village), local mountain air, mineral water and the like.

In addition to offering certification criteria on standards for hoteliers, Alpine Wellness International also includes guideline criteria on the "specialist areas" of "Alpine pampering", "Alpine Fitness", and "Alpine Health". The guidelines include nutrition and its association with meals of the day depending on the type of client need such as fasting, dieting or regular eating.

The guidelines also describe necessities in terms of facilities, location and area, programmes, exercise and relaxation, atmosphere, materials and furnishings, country specific wellness criteria e.g. Best Health Austria certification, peaceful Alpine atmosphere/bedrooms and wellness area, and the hotel having a wellness concept.

Alpine Wellness International's website offers consumers the ability to see their certification criteria, obtain a list of hoteliers in the Alps regions of Bavaria, Austria, South Tyrol and Switzerland. Furthermore a potential consumer can view the hotels' well being highlights, find package deals, make enquiries via the Alpine Wellness International website and other services.

It's also important to mention Alpine Wellness International's partnership programme. Partners fall within the categories of: higher and further education; nutrition and diet; research and science; media; planning, design & consultancy (construction); manufacturers and; sport. All of these areas help to ensure that Alpine Wellness's guidelines offer quality products and services that lend to creating an exceptionally positive well-being experience.

Another example of a well-being tourism standards based organisation is Deutscher Wellness Verband (DWV). DWV is a German company with expertise in promoting unified quality standards for wellness products and has experience in creating standards in countries such as Poland, Russia and Slovenia. DWV served as advisors on the Public Private Partnership Gran Canaria Spa & Wellness project.

Well-ness Destinations in Pictures

An interesting view of how pictures can help market well-being is offered below. These are examples of two hotels in the Alps that are found within the Alpine Wellness International web site.

Ebner's Waldhof am see



Note within the photographs, the greenery, the sunshine, trees, hotel views of mountain and lake along with the specially designed lounge chairs.

Grand Regina Alpin Wellfit Hotel



Note the light wood interior of the hotel, lending to soft, wholesome relaxed mood. Also, note the word "Wellfit" within the name of the hotel which emphasises the hotel strategy and important of well-being as a business concept for hoteliers.

Benefits of tourism to the Wellbeing of the tourist destination

Tourism and successful Wellbeing tourism's impact goes beyond the tourist. Wellbeing can positively impact the tourist destination as well, not only in economic terms but in knowledge and emphasis about healthy lifestyle. This can positively impact on a wider scale such as with a reduction in national health costs, increase in local produce, greater care for the local environment and other beneficial results. For example, a study by Richard J. Reeder and Dennis M. Brown for the US Department of Agriculture in 2005 found that "Rural tourism and recreational development results in lower local poverty rates and improvements in other social conditions, such as local educational attainment and health (measured by mortality rates)."

What are tourist businesses emphasising when marketing the concept of well-being and what specific innovations are taking place?

Visit Bath & Beyond - The official tourism website for Bath, England – emphasizes its strength in spa related well-being as a tourist destination. However it also markets a salt cave and the salt cave's associated respiratory and relaxation benefits, traditionally associated with countries such as the Czech Republic and Poland.

Those benefits are derived from the healing properties of its natural occurring salt crystals.

Visit Bath & Beyond also markets the city's healthy cuisine as a strength, Bath having been "the first place in Britain to hold a farmer's market". Visit Bath & Beyond states: "There's an eclectic mix of traditional and modern restaurants, many of which are committed to using fresh, local ingredients and organic produce in their preparation of delicious 'slow food' (as opposed to the fast variety). The city and countryside also have a good choice of vegetarian and vegan places to eat."

An interesting innovation in well-being tourism comes from the Czech Republic, known for among many things, its superior tradition in beer brewing. The Chodovar Family Brewery in Chofova Plana offers a spa menu based on beer where well-being involves bathing in the beer as opposed to simply drinking it. This is reputedly the world's first beer spa. In addition to the beer bathing, Chodovar also offer beer massages and beer body wraps.

The beer's healing properties are explained as: "the beer yeast provides the skin with a wide range of vitamins B, proteins and saccharides and contributes to overall softening and regeneration of the cuticle. Carbonized bubbles contained in the mineral water IL-SANO remain on the skin, calm down the warmed up body surface and enable effective relaxation in mild sparkling baths."

It's notable that the Beardmore hotel in Clydebank, Glasgow once offered a whisky spa, but an on premises spa no longer exists.

The Future of Well-being Tourism

The following trends are taken from Spa Finder, wholesaler of spa vacations.

1. "Spas are becoming more and more relevant to today's traveler, as more and more people turn to spas to improve their looks and well-being.
2. Medical spas will provide the prescription for health and wellness. Cosmetic treatments were the rage in 2003, but in 2004, baby boomers will use medical spas for truly medical purposes – namely preventative health treatments and regimens, nutrition and fitness, and health and wellness education.
3. Spa experience will become more mainstream in the corporate world. Mixing business with 'spa' pleasure, businesses will engage the use of spas to build relationships, motivate employees, and manage employee health. Innovative businesses, including insurance providers, will underwrite regular spa visit to promote employee health and productivity and to lower medical costs. (Interestingly, the American Academy of Family Physicians estimates that 60% of all problems brought to physicians are stress-related. US corporations lose approximately \$150 billion each year to stress-related disorders.)
4. The 'Destination Day Spa' will become a new spa facility category. Moving beyond the typical day experience, destination day spas offer a holistic mind/body/spirit experience similar to experiences normally associated with

destination spas, minus accommodations. One-day mini retreats will include education programs, fitness programs, and healthy meals, in addition to spa/beauty treatments.

5. The spa experience will become more affordable and inclusive, thanks to the continued explosion of affordable spas geared to middle income earners seeking professional treatments and wellness programs.

6. International spa tours will replace international spa treatments. Rather than seeking specific treatments from specific facilities, the international traveller will seek to sample a variety of spa experiences within the same destination.

7. Spa cuisine will break out of the spa and into our dining rooms, thanks to popular spa cuisine cookbooks and recipes. High-end spas will enlist celebrity chefs, expand menus, employ innovative branded diet programs, and accommodate special diets.

8. Spas will become the primary consideration for many travellers. In recent years the fastest growing segment of the hospitality industry was hotels with spas. Indications are that spas with hotels will become an even bigger factor in consumer travelling decisions. Rather than being an 'amenity' offered at hotels or resorts, spas will be the deciding factor or the primary draw.

9. Spas will increasingly cater to pets, offer kennels and pet treatments and programs.

10. Spas will continue to attract men and offer male-focused activities like golf, outdoor adventure, male cosmetic programs, and high-octane fitness programs. Men will use spas in record numbers and more spa facilities across the spectrum will offer equal facilities for men and women.

11. A strong family orientation will prevail. Teenage girls used spas in record numbers in 2003 for beauty treatments and the glamour of a luxurious spa experience. It is predicted that spas will cater to even younger visitors, including boys. These young spa-goers will come with their families seeking health and wellness programs. Spas will cater to them by offering more family-oriented activities, spas-for-kids, and or kids-only spa programs."

Appendix

Appendix #1. Best Practice Case Study – “The Feel Good Place”

“At Adelboden, the emphasis is on the simple and the natural. A place full of energy. And full of sporting challenges in step with the rhythm of nature.”

Adelboden markets itself as a well-being destination for those seeking a tourism experience that embraces the medicinal qualities of the concept. It is interesting to see how Adelboden actually describes its attributes. The paragraphs below are taken directly from the section entitled “Alpine Wellness” within the official Adelboden website.

“Unique Alpine feel-good factors leave their mark on the wellness destination of Adelboden. These include the medicinally optimum altitude of 1,350 m above sea level, the mild, invigorating climate, mountain freshness, mist-free autumns and winters, pure and healthy spring water, the Bernese Oberland way of life and the gentle scenery set against a glacier-white mountain backdrop. Embedded within it, the excellent wellness hotel, the ****Parkhotel Bellevue & Spa, with its 1,300 m “aqua vitalis” wellness oasis. A rich contrast of Alpine culture and scenery enriched by personal encounters in the chalet village.

Adelboden's “Alpine Wellness” quality philosophy is very much tailored to the needs of the individual guest, offering an incomparable and wide selection of activities under three Wellness themes: “Alpine Indulgence”, “Alpine Fitness” and “Alpine Health”. For example with “Alpine Indulgence” you can enjoy home-produced specialities and regional dishes with family or friends. “Alpine Fitness” could take you on a bracing walk to view the natural water spectacles around the Wildstrubeldorf, and “Alpine Health”, for example, might start with a glass of our own calcium and magnesium-rich Adelbodner mineral water.

At the 5th Alpine Wellness Days Adelboden from 9th-26th August 2007, local people and guests are invited to discover and enjoy a selection of activities for themselves, and thus had the chance to experience Alpine Wellness first-hand.

On 9th July 2005, Adelboden was officially accredited by Alpine Wellness International as the first Alpine Wellness resort in Switzerland. This qualification certifies that Adelboden has a comprehensive Alpine Wellness infrastructure and in all areas of Wellness competence scores highly for quality and attractiveness. Of course, the landscape and the abundance of nature play a very important role in our success.”

What does the Alpine Wellness International designation offer the Adelboden visitor in the words of the Adelboden tourism authority?

“The (Alpine Wellness International) qualification certifies that Adelboden has a comprehensive Alpine Wellness infrastructure and in all areas of Wellness competence scores highly for quality and attractiveness. Of course, the landscape and the abundance of nature play a very important role in our success.”

Alpine Wellness highlights in and around Adelboden - a selection:

- Alpine Wellness Experience Park at the Nevada Arena (drinking fountains, hammocks, rest benches etc.)
- Alpine Wellness Trail (Wasserweg)
- Engstligenalp "place of power"
- Engstligen waterfalls
- Choleren gorge with "Fountain of Youth" and Pochtenkessel
- Fantastic mountain world with laid and marked footpaths
- Cosy mountain restaurants and alpine huts
- Nordic Walking Trails
- Themed trails such as discovery trail "schutz.wald.mensch.", floral mountain trail, Vogellisi path, etc.
- Special guest activities such as visits to a traditional mountain cheesemaker , guided hikes, village tours, etc.
- Adelboden Mineral Water and spring
- Panorama Swimming Pool Gruebi/Adelboden
- 4th Alpine Wellness Days Adelboden
- Parkhotel Bellevue & Spa with large private spa area
- Adelboden cuisine
- Original Adelboden products"

The Adelboden case emphasises not only the concept of well-being as an important selling point, but the village's strengths within the concept of well-being. Adelboden also demonstrates a maturation of well-being into a quality standards based concept with the inception of organisations such as "Alpine Wellness International". The list provided by the Adelboden tourist authority also stresses the merits of locality. That includes food produce, local sites (e.g. Adelboden village), local mountain air, mineral water and the like.

Appendix #2. Best Practice Case Study. The Island of Wellbeing.

Tenerife markets itself by inviting consumers to "Enjoy the island of wellbeing". The website describes Tenerife's wellbeing attributes under the headings of air, lava, light, ocean, "a historic destination" and tropical fruits. As with Adelboden, Tenerife emphasises its unique strengths within a wellbeing framework. The "historic destination" section focuses on Tenerife's history as a destination for those individuals who were recovering from various ailments. The Tenerife tourism authority indicates that it has become a "reference point since the XVIII century for British, German and Swedish visitors" with "Swedish specialists (having) selected Tenerife after searching half way round the world for a suitable location for their patients to rest and recover".

Therefore, in one sense, Tenerife is marketing its exceptionally suitable climate as a destination of climate therapy. However, the other wellbeing attributes use terms such as "pamper(ing) your senses", "boost your vitality", "flood your senses", "natural stimulant", etc. Offering visions of re-invigoration and vibrance.

Appendix #3. Love Cyprus. The Official Portal of the Cyprus Tourism Organisation. 2008.

"Find out what Aphrodite's secret for perennial health and youth is, at one of Cyprus' world class health spas and wellness centres. Luxuriate in these oases of tranquillity situated at some of the island's top hotels, in beautiful surroundings overlooking lush gardens or stunning views, while allowing yourself to be pampered to your heart's content."

Cyprus, like Tenerife, has a section on its official tourism website that attempts to market its well-being tourism assets. "From sumptuous food to impeccable accommodation, here you will find everything you could possibly need. The myriad of facilities designed for your absolute well-being, include indoor and outdoor pools, freshwater and saltwater pools, whirlpools, saunas, steam rooms, hamams, fully equipped gyms, aerobics studios, treatment rooms and beauty salons. Friendly and attentive staff will see to your every need, revitalising and energising you with beauty and health treatments to tone your body and clear your mind. You will be given counselling and fitness assessments to fit your own specific requirements and personalised sessions to make you feel special".

The website goes on to describe the "wide array of services" that can "rejuvenate" the tourist in search of well-being. "Sample from a full range of packages designed to de-stress, relax and revitalize you, including detoxifying algae and mud body wraps, aromatherapy, thalassotherapy hot stone therapy, massages, shiatsu, reflexology, natural therapies and beauty treatments, to name but a few. Try the local 'trachana wrap', a sour milk and coarse wheat concoction, normally made into soup".

It is key to note the last sentence which offers a unique "local" service within its offerings as a well-being destination. The unique local offerings help the traveller to appreciate a cultural holiday in addition to a standardised health and well-being spa experience. In that respect, the customer is both enjoying the benefits of local treatments while savouring local culture.

"So jumpstart your fitness or beauty program, recharge your batteries, or sit back and relax. Whatever your desires, Cyprus' wellness centres are such heavenly retreats that Aphrodite herself would envy".

Appendix #4. Well-Being Activities

Although the world offers a plethora of health and well-being experiences, typical and popular UK health and well-being experiences are offered by Proseed within the table below:

Tranquil, Relaxing Activity	Physical Activity
Country walks	Gym
General massage	Swimming
Manicure / pedicure / beauty therapy	Cycling
Reflexology	Horse riding
Indian Head massage	Go-karting / quad biking / off road driving
Foot spa	Sailing
Floatation tanks	Golf
Acupressure	Canoeing
Yoga	
Eating and dining with an emphasis on top quality local or organic food	

Appendix #5. Summary of market factors impacting on the Health & Well-being Tourism Market. Taken from Proseed.

(green = positive, red = potential negative)

High Importance	<ul style="list-style-type: none"> • A desire to live longer and healthier • 24/7 lifestyles & declining mental health • Proximity to London • Political support • Competition from other UK and overseas destinations 	<ul style="list-style-type: none"> • Increased general interest in well-being and health • Increasing interest in local and seasonal food • Promotion of well-being by commercial and membership organisations • Growing sedentary lifestyles of children and young adults 	<ul style="list-style-type: none"> • Increasing availability of information via the web etc • Growing awareness and education
	<ul style="list-style-type: none"> • Vagaries of British weather 	<ul style="list-style-type: none"> • Perceived Image of South East being non tranquil • Lack of appeal compared to other destinations 	<ul style="list-style-type: none"> • Need to market collaboratively to afford promotion campaigns that will get the well-being tourism product noticed • Problems with what 'farm' means to some consumers
Medium Importance	<ul style="list-style-type: none"> • Increased levels of disposable income • Changing age dynamics of the population. • Hosting of the Olympics 2012 • Growth of world health threats 	<ul style="list-style-type: none"> • Increasing tourism fashion • Time constrained and convenience culture • New tourism experience needs • Increasing use of well-being experiences as gift and work incentive products 	<ul style="list-style-type: none"> • Transport and accessibility of the region
	<ul style="list-style-type: none"> • Time Pressures limiting well-being time 	<ul style="list-style-type: none"> • Social exclusion problems 	<ul style="list-style-type: none"> • Younger generation user group
	Low influence	Some potential to influence	Significant potential to influence

Appendix #6. Trends In International Spa tourism. Taken from Tourism Victoria (Australia).

Some of the major global trends identified by spa travel and marketing company, Spa Finder are:

- "Increased emphasis on luxury - The luxury end of the market is forecast to become even more luxurious with more exclusive, private, meaningful, tasteful experiences and more extravagant, indulgent experiences.
- Spas and wellness retreats will help consumers to achieve their health goals - consumers will use resort spas and wellness retreats to achieve goals such as quitting smoking, recovery from grief, achieving mindfulness, spiritual awareness and detoxification.
- Spas as education centres - Spas will increase the quality and number of spa education programmes and workshops and use experts to lead focussed seminars and retreats.
- More online bookings -Travel portals will enable online travellers to book spa vacations and treatments as part of their travel packages. Online spa bookings will further drive spa expansion.
- Resort spas will diversify products -More use of indigenous experiences and products eg. Thai massage, Ayurveda, acupuncture and hot stone massage.
- Boom in spa cuisine -New demand for spa cooking classes and spa chefs. More demand for customisation and variety of spa cuisines".

Appendix #5. Spa & Wellness Treatments

Typical Spa and wellness treatments include:

- Acupuncture,
- acupressure,
- Herbal bath,
- Bach therapy,
- Salt cave/salt room,
- Magnetic therapy,
- Ultrasound treatment,
- Oxygen therapy,
- Mud pack,
- Ayurvedatherapy,
- Phototherapy,
- Sound therapy,
- Chiropractor,
- Spinal exercise,
- Massage,
- Kneipptherapy,
- Thalassotherapy.

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