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WELLNESS TOURISM – COMPETITIVE BASIS OF EUROPEAN HEALTH TOURISM DESTINATION

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Abstract

Wellness tourism, as global phenomenon of the 21st century, has become an imperative for the successful development of health tourism destinations. Millions of tourists travel to destinations all over the world every day, with one goal - to preserve and improve their mental and physical health. Tourism market is characterised by intensive changes, so the task of the health tourism destinations' management is to follow those changes vigilantly, in order to be able to adjust their offer to the current trends. In that way, the creation of integral health tourism product is achieved, which will meet the needs of the contemporary customers, who are becoming more demanding and sophisticated. The aim of this paper is to present the importance of wellness tourism in the contemporary offer of health tourism destinations.

Key words: wellness tourism, health tourism destinations, Europe

1. INTRODUCTION

Spa tourism has for years represented the border area of medicine and tourism in spas with the basic aim of prevention, rehabilitation and treatment with a professional and controlled application of natural healing factors: climate, thermal mineral water, peloids, sea water, etc. However, changes and trends in the tourism market influenced the spa tourism out of the traditional framework of

healing tourism and prominent hospitalized service philosophy and increasingly encompass also preventive medicine forms or elements of wellness, which have even become the most important part of the offer. A large number of spas reoriented from classic spa contents to tourist, recreation and wellness contents (Milićević, Milovanović, Podovac, 2012).

Spas today are not just health resorts, rehabilitation centers, but modern health tourism destinations, visited also by healthy people with the motive of preventive health care, those wanting to use the wellness services and those who want to relax, detox (detoxification), recreate, lose weight, stop smoking, engage in sports activities, enjoy socializing, cultural environments and events, discover culinary specialties, etc. (Vesenjak, 2010). For spas to survive in a highly competitive and turbulent tourism market such a reorientation was necessary.

Today's spa tourism has taken over the image of the original and classic "thermalism", along with a wide range of different services, where water due to its natural relationship with the essence of the human being, it remains one of the basic elements, although it is used in different ways, with different objectives and with the new techniques (Gustavo, 2010).

2. WELLNESS CONCEPT

Wellness is a modern word with ancient roots. As a modern concept, the concept of wellness and wellness philosophy for the first time in scientific literature was mentioned by Dr. Halbert Dunn, back in 1959 in scientific articles "What high-level wellness means" and "High-level wellness for man and society", when he first wrote of a special health condition involving a sense of well-being where one is seen as unity of body, soul and mind. Dunn termed this state of personal satisfaction "high-level wellness." In that way he fused the concepts of well-being (being well, feeling well) and fit-ness (to be fit, being fit). Wellness means feeling good, not only being healthy but being happy and healthy. Already in 1961, Dunn wrote his first book on the subject of "High-level wellness." Thereafter, the term "wellness" started to be mentioned in the publications of numerous authors: Ardell (1977); Travis (1984); Benson, Stuart (1992); Greenberg, Dintiman (1997); Myers, Sweeney, Witmer (2005); Smith, Kelly (2006), etc.

The principles of wellness, however, are much older; they have their origin in the ancient medical practice and medical traditions dating thousands of years back. Ancient cultures of China, India, Greece and Rome had a very wise approach of maintaining health; they sought to emphasize the "whole person" or "harmonious" approach in order to feel and be well. Today, the concept of wellness reaches its full maximum, with modern application of ancient practices such as ayurveda, acupuncture, yoga, meditation, etc.

Myers, Sweeney and Witmer (2005) define wellness as a lifestyle oriented towards optimal health and good feeling (well-being) in which the body, mind and soul are united for the sake of a more complete life of man in his social and natural environment. It is an active lifestyle, which guarantees health, happiness and self-realization. It consists of four basic elements - physical activity, spiritual activity, healthy and natural nutrition and personal relaxation, i.e. relaxation. With these four elements, in recent years, as the fifth element appears also the beauty program, or facial and body care.

In general, the term "spa" is often cited as a synonym for wellness. Wellness is certainly a more comprehensive, broader and more complex concept than "spa". While the "spa" can be based only on one of the four elements of wellness (physical activity, spiritual activity, personal relaxation and a healthy and natural diet), wellness cannot function if missing even one of these elements.

The concept of wellness differs from country to country and opinions about what constitutes wellness strongly disagree. In most countries of Central and Eastern Europe wellness is viewed through the healing thermal mineral water and spa. In Southern Europe the emphasis is on the sea wellness, where the sun, sea air and wavetherapy and the Mediterranean diet contribute to the general welfare of man. In Scandinavia, the greatest importance is given to external activities such as Nordic walking, skiing, swimming in the lake even in winter. In Finland, for example, almost all people have saunas in their homes, which are part of their everyday wellness (Smith, Puczkò, 2009). On the other hand, extremely popular in Germany and Austria are Kneipp's treatments (named after a German priest, Sebastian Kneipp (1821-1897), based on five principles: water, herbs, healthy diet, exercise and discipline-balance (www.kneipp.com/kneipp_philosophy.html). In Asia, wellness is increasingly seen through spiritual activities such as yoga, meditation and various types of massage, through which energy is carried to a man enabling him to feel better. In contrast, the USA, Canada, England and Australia, wellness focuses on "daily spas" or "beauty and health farms", which offer cosmetic treatments and care, leisure activity and relaxation (Smith, Puczko, 2009).

Wellness today represents the lifestyle of the world. Wellness is a philosophy, as opposed to negative and reactive approach to life, emphasizes the positive and proactive approach to life that will increase and enhance all dimensions of human existence (The Global Wellness Tourism Economy, 2013). The main role of wellness is health care that is, maintaining a healthy body and spirit through the condition trainings, physical and mental relaxation and preservation of inner peace. For this reason, and due to a stressful lifestyle, the need for programs that creatively and effectively implement the sense of wellness has increased all over the world, including the importance of such programs in offers of health tourism destination.

3. WELLNESS TOURISM

Some authors consider wellness tourism as a subcategory of medical tourism. According to Mueller and Kaufmann (2001), wellness tourism is „the sum of all the relationships and phenomena resulting from a journey and residence by people whose main motive is to preserve or promote their health. They stay in a specialized hotel which provides the appropriate professional knowhow and individual care. They require a comprehensive service package comprising physical fitness/beauty care, healthy nutrition/diet, relaxation/meditation and mental activity/education.” Wellness tourism is a journey whose main goal is the achievement of balance and harmony of mental, emotional, physical and spiritual values of man (Spasojević, Šušić, 2011).

Wellness tourists are exclusively "healthy people" and the primary purpose of their trip is to preserve the health, i.e. the prevention. Smith and Kelly (2006) consider the wellness tourists usually "active health seekers" who are highly motivated and determined to play an active role in their own health. They often choose alternative from classical medicine and are not afraid to experiment. Most wellness tourists are already active at home in one of the types of activities (yoga, meditation, massage, healthy food, etc). Those who are not active at home often want to be more engaged in wellness activities on vacation. The main clients of wellness tourism are women aged between 36 and 55 years (most of them are around 47 years of age) and couples who come without the children (Tourism Development Strategy of Serbia, 2005). These consumers are highly educated and have a good financial state, i.e. are of greater of payment ability. Wellness tourists spent on average 130% more than the average tourists (Ellis, 2013). However, in recent years there is a clear trend indicating that the wellness travels are more and more attractive to younger population as well. Tourists from 20 to 25 years are the group increasingly interested in this kind of travel. Age group of tourists of 50 - 65 years still has the greatest potential. They seek common medical methods for health care, stay longer at the destination and their treatments generally last longer (Pupavac, Čeran, Škrbić, 2010).

Most wellness tourists are from the USA, Germany, Japan, France and Austria. These five countries account for 63% of the wellness market. Europe, with 203 million of wellness travels, is a leader among the regions in this industry, while considering the consumption in wellness tourism (158.4 billion USD); it is the second region in the world (Ellis, 2013).

Top 5 world's largest consumers in wellness tourism in 2013.

	Expenditures (\$ Billions)
United States	167,1
Germany	42,2
Japan	28,6
France	24,1
Austria	14,0

Source: Ellis, 2013

Wellness tourism is a true megatrend on the tourist market (The Global Wellness Tourism Economy, 2013):

Wellness tourism represents about 6% (524.4 million) of all domestic and international trips

Wellness tourism accounts for about 14% (\$438.6 billion) of all domestic and

international tourism expenditures

Wellness tourism is projected to grow by more than 9% per year through 2017, nearly 50% faster than overall global tourism

Wellness tourism generates 11.7 million direct jobs all over the world, etc.

What is important for wellness tourism is that it is not seasonal and can therefore be used at any time of year. Also, one of the characteristics is that wellness offer is used not only by tourists but also by locals.

4. SPECIFICS OF HEALTH TOURISM DESTINATIONS

Natural healing factor, as the basic attractiveness of the health tourism destination is a decisive motivator for visiting the destination and use of its products. Climatic, balneological, thermal and mineral water or other natural healing factors, along with other tangible and intangible products, make the health tourism destination. The preponderance should consist of partial products based on the resources of health tourism. Thus, the health tourism destination is the one that is offering such an integral tourism product in which there are mostly partial products that will be motivating for tourists wanting to come for health reasons, no matter whether for prevention, cure or rehabilitation (Hrabovski Tomić, 2006).

Health tourism destination bases its existence on the existence of natural healing factors, necessary facilities, technical equipment and quality personnel trained to treat and provide specific medical treatments to visitors and other services, but also on the existence of an efficient system that includes a complete offer related to tourist hospitality, reception, accommodation and entertainment, so that in that way, the stay and travel experience in the area are as pleasant as possible and provide the greatest possible pleasure to visitors (Marseu, 2011).

For a spa to be competitive and to achieve a higher demand than that motivated by previous need for the spa treatment, it must evolve into a health tourism destination. The offer has to be enriched by contents for providing various spa&wellness services in order to promote, stabilize and restore the physical, mental and social well-being with the help of natural healing and other environmental factors, as well as sports and recreational and cultural contents.

Aesthetic arrangement of tourist area: parks, walking trails, places for "relaxed" leisure, etc., are also necessary (Milićević, Milovanović, 2012).

Health tourism destination management needs to develop and optimally combine at all levels all the elements of the tourist offer, that is to manage the destination as a competitive unit, which should be strategically guided to secure and maintain the competitive advantage. The problem in modernizing the management of health tourism destinations is partly because the former spa tourism was developed as a form of tourism for which it was enough to offer healing thermal mineral springs, healing mud or air, some souvenirs and a modest accommodation, as users of services in spas were primarily visitors-patients (Hrabovski Tomić, 2006).

Health tourism product in every European spa center is defined as a set of traditional balneotherapeutic, wavetherapeutic and/or climatetherapeutic methods combined with modern medical procedures providing treatment, rehabilitation and prevention of medical conditions that arise on the basis of sedentary lifestyle and work, poor dietary habits and lives in a stressful and environmentally endangered, working and living environment (Franović, 1995).

Given that in spas equally stand: medicine and therapy, nature and culture, movement and relaxation, as well as communication and experience, it is their clear advantage in tracing new paths of development of wellness tourism compared to other destinations. Spas of Europe, as well as competent centers of comprehensive offers, recognized the importance of wellness and increasingly adapt to this new trend on the demand side (Hrabovski Tomić, 2006).

5. THE IMPORTANCE OF EUROPEAN WELLNESS TOURISM

From the moment when the essence of spa structure was a "doctor" and "bathroom" there has come to the structuring activity of modern spas in accordance with the criteria and greater flexibility and with various other professional profiles to be organized and managed. Spas have become the industry for products and services dedicated to the health and overall physical and psychological well-being of people, with a product line structured according to the type of clientele (Scopel, 2011):

- In addition to traditional therapies wellness activities, rehabilitation, cosmetic and spa treatments psychological and physical relaxation have been developed and even prevailed;
- Parallely a new culture of accommodation has been developed with an impact on the concept of the spa facility and spa environment, as well as the organization of network services according to the clients' needs;
- Expertise profile of spa and wellness personnel and appropriate education of managers are an essential condition for the quality of the offer.

Spa sector is a complex and structured phenomenon that has over the years changed its own position in the context of tourist activities; tourists are not only tied to the spa treatments, but also to sports and recreational, cultural and leisure contents, making the unipolar tourism to become multi-polar (Jovičić, 2008). During this long process of evolution the field of possible activities expanded within the wellness, which has also led to engagement of Eastern therapies and thus reaching a holistic concept that includes all possible options, taking into account the various aspects of life of the individual, from the treatment to psychophysical and relational aspect. In short, over the years, there has been a transition from curative to preventive and therefore to health promotion (Scopel, 2011).

Integrating traditional spa tourism with other forms of tourism is used by most European spa resorts (Jovičić, 2008). Spas that have adopted such a tendency and spread its own offer with numerous additional services, have progressively advanced in the tourism market, which is primarily related to the traditional competitive countries such as France, Hungary, the Czech Republic, Slovenia, Germany, Austria, Italy (Milićević, Milovanović, Podovac, 2012).

Further in the paper examples will be presented of famous health tourism destinations in Europe, attracting a large number of guests by the integrated health tourism product.

Slovenia has 15 natural health resorts and spas. All spas are included in the public health network of Slovenia (Development Strategy of the tourism product "Wellness" in Slovenia - "Tourism Well-being", 2004). In the spa offer not only present are balneotherapy and physiotherapy services but also the most modern offers in the field of well-being products, as well as new programs for maintaining health and preventing disease. Wellness centres in spas offer fitness, Turkish and Finnish baths, whirlpools and various baths and massages. Some wellness centres offer massages and other services that are based on the knowledge of the ancient East (shiatsu, reiki, ayurveda, sawadee, watsu, tui-na, scen tao, hot stone massages). Wellness services are provided only by trained professionals with certificates. Services of wellness hotels are divided in several categories (<http://en.slovenia-terme.si/offer/wellness/>):

- Spirit & mind – social and cultural events, sightseeing, workshops, lectures, etc.,
- Health – wellness services associated with traditional medicine and beauty clinics,
- Vital cuisine – a selection of various vegetarian and macrobiotic diets,
- Beauty and cosmetics – services provided in beauty centres, cosmetic massages, pedicure, manicure and hairdressing salons,
- Relaxation, comfort – various massages and baths, yoga practice, pilates and tai chi.

Among the most famous spas of Slovenia is Terme Olimia, including the wellness center "Orhidelia" - the best wellness center in Slovenia in the last 5 years, as well as the World of saunas "Termalia" - the largest in Slovenia (at 1,550 m²). Thermal spa Zreče offer wellness & spa resort Idyll: Sawadee Idyll Orient (Thai massages, Japanese rituals Hanakasumi, ayurveda), Nature Idyll (various programs of the best of nature) and Mountain Wellness on Rogla. Thermal spa Ptuj includes Valens Augusta wellness center, which consists of three parts: "Imperium" with the offer of a good feeling, thermal baths and saunas "Flavia" and the pool part "Vespasian" (ISSUU: Slovenia - Thermal Spas, Well-being, Healthy Living).

Due to the wide range, in 2012 the Slovenian spa resorts have recorded 786,700 visitors and 3,090,900 overnight stays (in 2000, there were 430,500 visitors and 2,117,900 overnight stays). Foreign guests account for 43% of tourist turnover. Most foreign visitors come from Italy, Austria and Germany (Statistical Office of the Republic of Slovenia, Statistical Yearbook 2013).

Hungary is a country with an abundance of thermal waters; healing thermal waters of high abundance can be found at more than 80% of the territory of Hungary. Apart from Japan, Iceland, France and Italy, supplies of thermal waters are the largest in Hungary. It has 1,300 thermal springs (Guljaš, 2010). Across the country, there are 350 "public baths" (Milojević, 2007). Services that are offered are the spa and wellness; they provide every kind of wellness&spa and physical therapy. Throughout history, bathing and spa tourism has always played an important role in Hungary. Today, a few hours spent in the "public baths" are part of the daily routine for lots of Hungarians. Wellness tourism in spas is represented through the following facilities, services and packages (Guljaš, 2011):

- Turkish or Roman baths;
- Treatment in a natural way;
- Dietary Center: treatment of the digestive tract (mineral water + bio foods);
- Thermal water + beauty treatments;
- Thermal water + eco-tourism;
- Thermal water + rural tourism;
- Thermal water and sport;
- Manager - treatments (vascular problems, digestive problems and cancer screening, wellness);
- Conferences and wellness;
- Family vacation, aqua-parks.

Among the most famous spas of Hungary is Gyula located in the park of the former castle Almasi. It has 19 pools some of which some are dark like oil because healing water of 72 ° C in them reaches from 2005 m depth. Then there is Miskolctapolca, a wonder of nature and the unique spa of Europe, known for its thermal baths that are situated in karst cave (Cave Bath). Huge cave system is filled with thermal water of temperature of 29°C, separated into 5 separate units, each for a particular mood. Spa Bükfürdo offers 32 pools with healing water. Lillafüred is another natural treasure, which rather resembles a fairy-tale village in the middle of the forest, and is a significant wellness center in the country (<http://spa.gotohungary.com/health-tourism>).

Hungarian spas in 2013 recorded 2,535,569 tourists (567,569 domestic and foreign 1,880,000) and 10,743,240 overnight stays (2,657,240 overnight stays of domestic and 8.086 million overnight stays by foreign guests). Most foreign visitors come from Austria, Germany and Russia (Hungarian Central Statistical Office, Tourism 2014). Foreign visitors visit more complex public baths in historic buildings (Turkish baths and bathing in the baroque style). From the accommodation facilities they prefer wellness and spa hotels (Global Spa Summit 2011, Wellness Tourism and Medical Tourism: Where Do Spas Fit?).

With thermal tradition dating back thousands of years, Italy is a country that can boast for about 2,300 mineral springs, located at 930 locations (Carella, Sommaruga, 2000). The connection between the spa and wellness center, which occurred at the beginning of the 90's led to the emergence of a new sector - spa wellness center, which is characterized by the use of spa products and services. In relation to tourism activities, progressively reduction of the number of treatments in spas has been replaced by the birth of a new kind of tourism and the composition of tourist flows has been changed with a shift from curative to prevention. Today, the spa sector is characterized by different activities, from bottled water to traditional spa services, to wellness, fitness and beauty services. Italy spas have become a modern destination for health tourism, with a line of products dedicated to health and overall physical and psychological well-being of people. In addition to traditional therapies, spas have developed a range of wellness, rehabilitation, beauty treatments and psychophysical relaxation (Scopel, 2011).

Abano thermal spa is among the most important spa complexes in the world. It is the largest spa in Europe specialized in mud treatment. It has 78 hotels and each hotel has its own thermal center (120 thermal pools). Thermal spa Merano is the most beautiful and most famous thermal spa on the "sunny side of the Alps." It contains 25 swimming pools. Montecatini thermal spa, the largest spa in Italy, offers a comprehensive offer of spa and wellness treatments in the thermal facilities, spa hotels and wellness centers. It has 190 hotels.

Spa tourism in Italy is the second in Europe in the number of visitors, just behind Germany, which registers about 8 million spa visitors per year (Carella, 2003). In 2013, spas of Italy were visited by 3,522,368 tourists

(1,980,326 domestic and 1,542,042 foreign tourists) who realized 12,764,902 overnight stays (7,171,862 overnight stays of domestic and foreign tourists 5,593,040). Most foreign visitors come from Austria, Switzerland, France and Germany (I.Stat - Italian National Institute of Statistics).

6. CONCLUSION

Exceptional growth rate of wellness market in recent years, both in America and in Europe, initiated the increasing and diverse offer in this segment. Modern spas / health tourism destinations have become the industry for products and services aimed at the health and general psycho-physical well-being of people. In addition to traditional therapies wellness activities, rehabilitation, cosmetic and spa treatments psychological and physical relaxation have been developed and have even prevailed. Expertise profile of spa and wellness personnel and appropriate education of managers are certainly an essential condition for the quality of the offer.

In order to meet the demands of modern tourists and be competitive on the international tourist market, destinations of health tourism in Europe today offer integrated health tourism product of extremely dynamic growth, which includes a diverse selection of wellness, combined with quality accommodation, gastronomic offer, sports, entertainment and cultural activities that complement the tourist stays.

Thus, modern health tourism destination should include: health institution applying alternative medicine with the professional staff, various wellness treatments with healing water, mud, or other natural healing factor, adequate facilities for this purpose, in-door and out-door swimming pools, high-level hospitality, architecture in accordance with the model of the spa center, natural environment with landscaped areas, in a quiet environment without traffic, noise and pollution, rich sports and recreational and cultural entertainment for leisure time of guests so that the stay and tourist experience in the area are made as pleasant as possible.

The concept of strictly specialized spa resorts is mostly obsolete. Arrival at spas (several shorter stays per year) to improve health, is increasingly replacing the traditional long health treatments. The important feature of modern health tourism refers to the integration of traditional spa tourism with other forms of tourism (wellness, sports and recreation and cultural entertainment, congress tourism, etc). Spas that have adopted such a reorientation and extended the offer by extra services have progressively improved in the international tourism market.

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