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Procedia Economics and Finance 32 (2015) 755 – 762

Procedia
Economics and Finance

www.elsevier.com/locate/procedia

Emerging Markets Queries in Finance and Business

International trends in recreational and wellness tourism

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Abstract

These days the various forms of health tourism are gaining an enhanced role in world tourism and this is also true of the economic performance of some countries. In the last decade, health tourism featuring an on-going development saw a dynamic development primarily in the area of wellness tourism at both national and international levels. The countries with the most significant wellness supplies and tourist movement are located in the first place in Europe (mostly in German-speaking and Mediterranean countries), North America and Southeast Asia (Kiss K. - Török I. 2001, Rátz T. 2004). The general trends such as the enhancement of individualization, demographic transformations, changes in women's social roles, spiritualization, the appreciation of healthy lifestyles have created the social background of the demand for wellness services and products (Friedl H. 2007, Zsigmond E. 2007). As for experts in various areas of science, the wellness market, due to social transformations and the favourable economic performance of the sector, is likely to become one of the fastest developing touristic and economic sectors (Ardell D. 1985, Nefiodov L. 1996, Horx, M. 2001, Scholz, J. 2003, Pilzer, P. 2007). The fact, however, that the various countries are unable to fully exploit the potentials hidden in natural endowments is not exclusively a problem in Hungary; moreover, it leads to the uniformity of supply and endangers the sustainability of natural assets. In the coming decades well-to-do, ageing but at the same time active age groups aspiring for a higher quality of life, particularly in North America, Scandinavia and Western Europe may represent a huge potential for wellness tourism.

Regarding wellness data there are no uniform measurement systems, i.e. terminological differences in various countries hinder the comparison of data on recreation and wellness. Both the sector and the customers need more information, data and resources to make wellness services competitive and trustworthy. For this reason, this study seeks to introduce the international and national trends in tourism, including recreational tourism and also to draw up a general picture of the international wellness market.

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Selection and peer-review under responsibility of Asociatia Grupul Roman de Cercetari in Finante Corporatiste

Keywords: health tourism; recreational tourism; wellness tourism trends

1. The meaning of recreation, wellness and spa

Out of numerous conceptual definitions, this chapter summarizes those ones which express the content of these words best of all.

1.1. Recreation

The word ‘recreation’ has several conceptual definitions. On one hand, it means the emerging massive demand for sporting and an active lifestyle due to the harmful health effects of present day consumer society; this trend focuses mostly on the refreshment of body and spirit, ensuing better intellectual and physical performance and capacities to work (Dobozy I. - Jakabházy L. 1992; Kovács T. A. 1998; Szabó J. 2004) On the other hand, recreation refers to adventurous and entertaining activities performed in one’s free time, based on the fact that these experience and activities, in the strict sense of the word, “recreate” the individual, refreshing him to the extent that he can continue and carry out his daily duties (Ap J. 1986). Recreational tourism is a branch of health tourism, which is characterized by the dominance of touristic services, i.e. those guests take part in the programs of service providers offering recreational services who are basically healthy and visit these places primarily to prevent health problems.

1.2. Wellness

As for Ardell’s (1985) definition, wellness is the state of health when body, mind and soul are in harmony. Its key elements are self-responsibility, fitness/beauty treatments, a healthy diet, relaxation, (necessity of stress release)/meditation, intellectual activity/learning, placing a high emphasis on environmental sensitivity and social relations. Besides differences manifested in motivation, wellness tourism is fundamentally different from health tourism, and the most characteristic difference lies in the fact that in wellness, various services are used by guests of their own free will and these activities are not financed by social insurance (I1).

1.3. Spa

The notion of ‘spa’ is strongly linked to wellness, i.e. all the facilities serving health tourism, denoting not merely traditional baths, but those facilities of which services relax, refresh, heal the guests, making them healthier and more balanced. Their key feature is the effort to ensure the state of wellness by satisfying physical, intellectual and emotional needs (Rátz T. 2004). The notion of spa is far from being uniform, the interpretation of its content is totally different, its perceptions vary widely in various parts of the world. In most parts of Europe (primarily in German speaking countries and in Middle Europe) it is used in relation to (thermal) baths offering basically medical services, whereas in the USA it includes services offering physical and/or mental refreshment, even without thermal water (I2).

2. The development of international tourism in numbers

Despite the economic uncertainty in 2012, the number of tourist arrivals exceeded 1 billion in the world in 2012. (1.035 million tourist arrivals internationally). The growth rate (+4.0%) is approximately equal to the

annual average of the long term predictions by UNWTO for the decade between 2010 and 2020 (+3.8%). Regarding international tourist arrivals, Germany has been ranked 7. instead of 8. among the 10 largest destinations, just like the Russian Federation, which took place 9 instead of place 124 on the list. Pre-estimates suggest that the international touristic revenues in the world amounted to 1.076 billion USD-t (838 billion EUR) of which real value (calculated in local currencies) represents 4.2% ore revenues than in 2011 (I3).

3. International trends

The last century saw massive changes and related new trends in the demand and supply conditions of international health tourism. In the 90s, in addition to traditional health and thermal tourism, emerging wellness-fitness services became increasingly popular among consumers (Kiss K.- Török P. 2001, Rátz T. 2004). Regarding the identifiable trends (e.g. Demand for a healthy lifestyle, individual responsibility for health preservation in an increasingly wide context, highly stressed lifestyle, the development of the ills of civilization, etc.) of this field in the third millennium, experts predict more dynamic growth than for health tourism (Kiss K. - Török P. 2001).

By introducing some countries, this chapter seeks to present a global picture about the offers, development, differences and characteristics of wellness tourism by countries and continents.

3.1. Australia

The Australian wellness and bath tourism focuses on a healthy lifestyle and prevention, a traditionally non-European health care and rehabilitation (Benett M. - King B. – Milner L. 2004; Puczkó L. - Bacharov M. 2006; Smith M. - Puczkó L 2008). Wellness tourism developed similarly to the North American spa sector, dominated primarily by small and medium enterprises. In 2006, 503 spas operated, the majority of which consisted of day spas with a considerable amount of destinations (hotels) and resort spas (AUSPA 2007). Day spas resemble beauty hotels/resorts in many respects; however, they do not offer accommodations (Voigt, C. Laing, J. 2010). The wellness tourism in the country can be identified by spa services and various outdoor activities, first of all domestic, 1-2 day tours. The majority of Australians tend to regard national wellness trips attractive and financially available options (I4).

Based on an in-depth study of the technical literature and earlier research in the Australian context, Voigt and Laing identified three different categories of wellness-tourism service providers (Figure 1.).

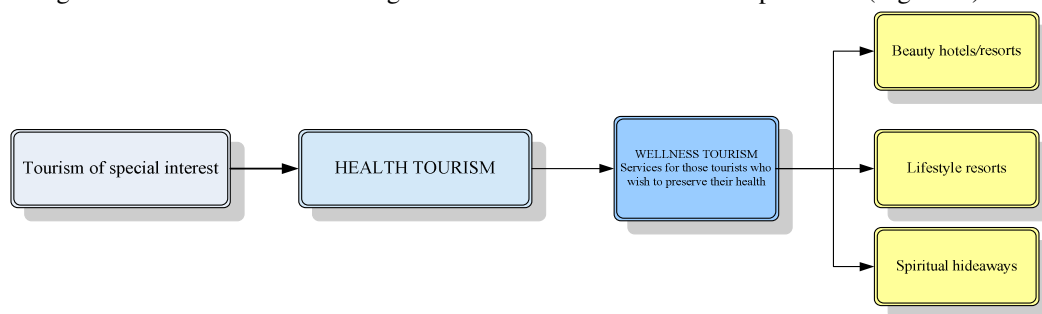


Figure 1. Categories of wellness-tourism service providers

Source: Dr. Cornelia Voigt - Dr. Jennifer Laing

- Beauty hotels/resorts principally concentrate on body and beauty care, they offer, for example, face treatments, massage, body masks and body exfoliation. Out of the three service providers, this one is the most likely to include “wet” treatments”. From this point of view, it is an advantage for certain beauty hotels and resorts to be located in the vicinity of mineral or thermal water resources; however, baths without such assets also offer such kind of “wet” cures. These wet treatments include e.g. steam chambers, sauna, jacuzzi, hot tub-baths, water therapy halls (where tub bath and hydrotherapeutic massage, for example Vichy shower bath are available).
- Lifestyle resorts usually offer overall programs aiming at transforming the lifestyles of participants in the areas of e.g. nutrition and physical training.
- The majority of Australian spiritual hideaways are characterized by the influence of Asian philosophy and meditation techniques (Voigt, C. Laing, J. 2010).

According to the estimates of the Australian Sustainable Tourism CRC, service providers in the area of health and wellness tourism (day spa, spa resort, spa hotels, lifestyle centers) can still be regarded as new. The number of spas where tourists can spend guest nights shows an increasing tendency and most service providers possess natural thermal water resources, which gives the spas a unique character. National tourists are the ones who are most likely to use spa services, but the spas are not their main destinations. The most typical feature of international tourism is the fact that guests do not primarily arrive at wellness centres, but some of them also visit spas (I4).

3.2. *Asia*

In the past decade, besides European countries with centuries-old bath traditions and resources to be widely exploited by tourism, in the countries of North-America, Eastern and South-Eastern Asia wellness tourism is regarded to be one of the touristic areas with the most successful and significant development potentials (Kiss K.- Török P. 2001, Rátz T. 2004). In addition to the United States of America, the tendency that the role of day-spa services operating in shopping centres, beauty farms, fitness centres etc. is increasing, is also observable in Asia. These places create opportunities to give pleasure in the daytime by providing various relaxation, therapeutic and beauty treatment services. The supply of free time clubs previously offering merely passive recreation opportunities in luxurious circumstances features active wellness services on an increasingly wide scale (KPMG 2002, Rátz T. 2002, ISPA 2006). Considering the outstandingly dynamic development of Southern-Eastern Asian tourism, it is not surprising that health tourism being traditionally popular in Europe and North-America has also gained a definite role in the expansion of touristic offers. Most of the countries in the region possess the resources and traditions that can be used in health tourism as well (e.g. Japanese or Korean bath culture, Indonesian body treatments, Thai massage techniques or the Southern-Eastern Asian cosmetic industry. Moreover, the advanced state of the touristic super culture has created the basis of the establishment of wellness facilities. Prior to 1994 there were practically no spas in Southern-Eastern Asia. Today all big hotels offer spas (I4).

3.3. *North – America*

Studies on health tourism on the North-American continent (meaning primarily the so-called spa sector) must take into consideration the significant differences between the European and the American interpretation of the notion of spa. In the European meaning it refers mostly to medical baths, whereas in the United States it is associated with facilities where service providers strive to create the physical, intellectual and spiritual well-

being and balance of customers by various means (e.g. meditation, beauty treatments, yoga, sport activities, proper nutrition) (Rátz T. 2004). As for ISPA*, in 1999 The United States hosted approximately 95 million visitors in 5.7000 facilities providing spa services. Research on the distribution of various spa types reveal that day spas play a key role throughout the whole sector (constituting 72.4% of offers), similarly to spa hotels and resorts 18.8%). The past decade saw an unprecedented development in the spa sector of the United States: the number of spa facilities quadrupled in the period of 1990-1999 (the number of spas was 1.331 in 1990 and this number jumped to 5.698 in 1999) and in the past 5 years it exhibited a growth rate of 21% per year. This tendency has been continuing with equal impetus since then. Professional positioning and price policy are the characteristic features of health tourism-related developments. ISPA research findings suggest that the gigantic increase of supply is the outcome of customer, investor and product trends as well.

3.3.1. Canada

Natural resources in Canada are the fundamental basis of tourism development related to nature and outdoor recreation, combined with accommodations providing wellness services. However, fitness, other recreational services and service providers have not been granted substantial promotions to attract a huge number of international tourists into the country (I5). Studies by Mintel Spa Tourism suggest that the growth rate of bath number has slowed down in the United States recently, which indicates the saturation of the market. By contrast, continuous growth is typical in Canada.

3.4. Europe

Europe still takes the largest slice of international tourism; however, its share from travels outside feeder market regions has been continuously decreasing. 51.6% of arrivals, i.e. 534.7 million ones were registered here in 2012. Regarding international touristic revenues, Europe had the largest share (42.1%; 453.4 billion USD). As compared to 2011 (calculated in local currencies), the touristic revenues of the continent rose by 1.8%, i.e. at a somewhat lower rate than tourist arrival numbers (I3).

Data revealed by STR Global European Hotel Review in 2012 reveal that European hotels reached moderately good results: the occupancy of European hotels in the survey grew by 0.1%, and the key factors of this decrease were the South-European decline and North-European stagnation throughout the year. The average price calculated in EUR expanded by 4.7%, the RevPAR[†] by 4.8%. (I6).

3.4.1. Austria

The touristic attractions of Austria, first of all its natural environment, localities and culture, attract a huge number of people. The developments of wellness services realized in the previous decades follow the international trends of supply and demand; nevertheless, they attempt to preserve the unique nature of Austria. The combination of quality and unique nature provide a genuine experience for guests (Varga N.-Molnár Cs. 2011). The country looks back on long traditions of thermal water and spa related services, which services were mainly used by the representatives of the older generation. Wellness-type services became attractive later, primarily among the young. As for wellness tourism in Austria, Middle Europe and German speaking countries are the most essential feeder markets, and the national market also plays a dominant role (I4). The country

* International Spa Association

† Revenue per available room

strives to include natural, economic or cultural attractions in its wellness supply which can be easily identified and lend a unique feature to wellness tourism. For this reason the special brand name “Alpine wellness” has been coined (Varga N.-Molnár Cs. 2011). Austria has set up an economic community with Germany, the largest health tourism market of Europe in terms of both demand and supply. In addition, a similarity can be recognized between the two countries regarding baths and their medical services. Austrian baths are new and well-equipped. The quality is first class, therefore Austria might be a serious competitor for Hungary. Out of Austrian baths, the Roman ones (Römertherme) are the most well-known and the outer appearance of medical hotels is given much emphasis (17). The largest part (about two thirds) of Austrian health tourism supply is provided by wellness hotels and service providers; in addition to them, medical tourism (mostly linked with thermal water and climatic places) has considerable guest numbers and strong growth potentials. In many cases, medical services and wellness services can be used in one place, typically in the “medica centre” of hotels, where treatments are conducted. The remaining part of the hotel (outside the medical centre) has exclusively fitness or wellness features. In all the Austrian provinces health tourism is given much emphasis, but Burgenland, Steiermark, Kärnten with their famous baths and hotels and also three western provinces Burgenland, Steiermark, Kärnten, where service providers convey the “Alpine wellness feeling” can be highlighted. The results of the micro census from the Austrian Statistical Office in 2005 reveal that more than 50% of the population (51%) are interested in wellness or medical holiday services, 12% of them had already participated in such holidays the year before the questionnaire was given to the respondents. Almost all the surveyed people (97%) would like to take part in such travels in the future.

3.4.2. Hungary

In Hungary the emergence of wellness can be dated to the second half of the 1990s. This type of health tourism has been gaining growing popularity. In addition to increasing demand and social, economic transformations on national level, it is also due to the enhancement of health and environmental awareness (Varga N.-Molnár Cs. 2011). An increasing number of companies were set up in the previous years and provide preventive and wellness services, fitting in the international trends.

At present, wellness services are offered in the following locality types:

- wellness hotels or in the wellness sections of commercial accommodations of various qualifications (e.g. medical baths).
- special units of medicinal, thermal and adventure baths,
- health centres,
- day-wellness providers, including wellness centres: these are facilities providing wide scale wellness, bath, sauna, relaxation, fitness, sport and related beauty services (18).

Besides the traditional and internationally renowned medical tourism profile, Hungary also offers continually expanding wellness services and potential future resources (OES 2007, MT. ZRT. 2007, Laczkó T. - Rébék N. Á. 2008). Today all service providers in Hungary seek to become a destination of medical tourism and only a few realize the opportunities of increasing demands for lifestyle-based services (19). The predictions of WHO claim that by 2022 tourism and the beauty industry together will become a dominant economic sector. In developed countries, the most significant feeder market, the growth of the elderly population is the most characteristic demographic trends. Health-conscious senior travellers with plenty of travel experience mean effective demand for the health tourism sector. Moreover, in welfare societies there is a strong need to connect self-financed health treatments with touristic experiences (13).

Characteristics of wellness tourism in Hungary:

- At present, 5 hotels have the status of Hotelstars wellness in Hungary, but the number of wellness hotels might be higher – the wellness hotel qualification is not yet compulsory.
- The number of operating medicalhealth spa is: 170[‡].
- The number of swimming pools, thermal, and medical baths, experience baths, open-air baths is: 385.
- Baths provide complex services (from medical baths to experience baths).
- Thousand years old bath culture with historical pools.
- The experience bath of Middle Europe can be found in Hungary, aqua parks are open seasonally.
- Meditation centres, lifestyle programs, from guest-houses to multi-star hotels, wellness hotels with unique concepts, hotels offering vinotherapy.
- The standard of hotels with baby-friendly, child-friendly programs are becoming higher and higher, regarding the fact that bathing is not only regeneration and relaxation, but entertainment as well: our wellness tourism programs typically offer day and night entertainment.

4. Engagement of the public and the private sector in wellness tourism

In several countries of the world, tourism management is the responsibility of many complementary organizations. This is also true of Hungary, as tourism management is included in some form in the tasks of a large number of organizations on various levels, having gone through and still going through changes since 1990 until today. Figure 2. shows the collection of public and private organizations playing a direct role in wellness tourism in different countries. Its true significance is manifested if the development of wellness tourism and the activities of enterprises in this sector are studied. Figure 2. presents the engagement of state governing bodies in wellness tourism, and the role of the private sector in building the wellness tourism in the given countries.

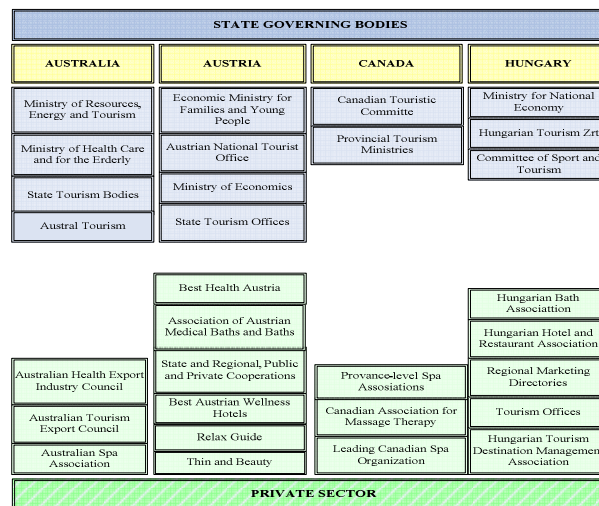


Figure 2. The structure of wellness tourism per country
 Source: Authors' own sources

[‡] Based on Hungarian Spa Association

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