

EUSAIR WELLBEING TOURISM HANDBOOK

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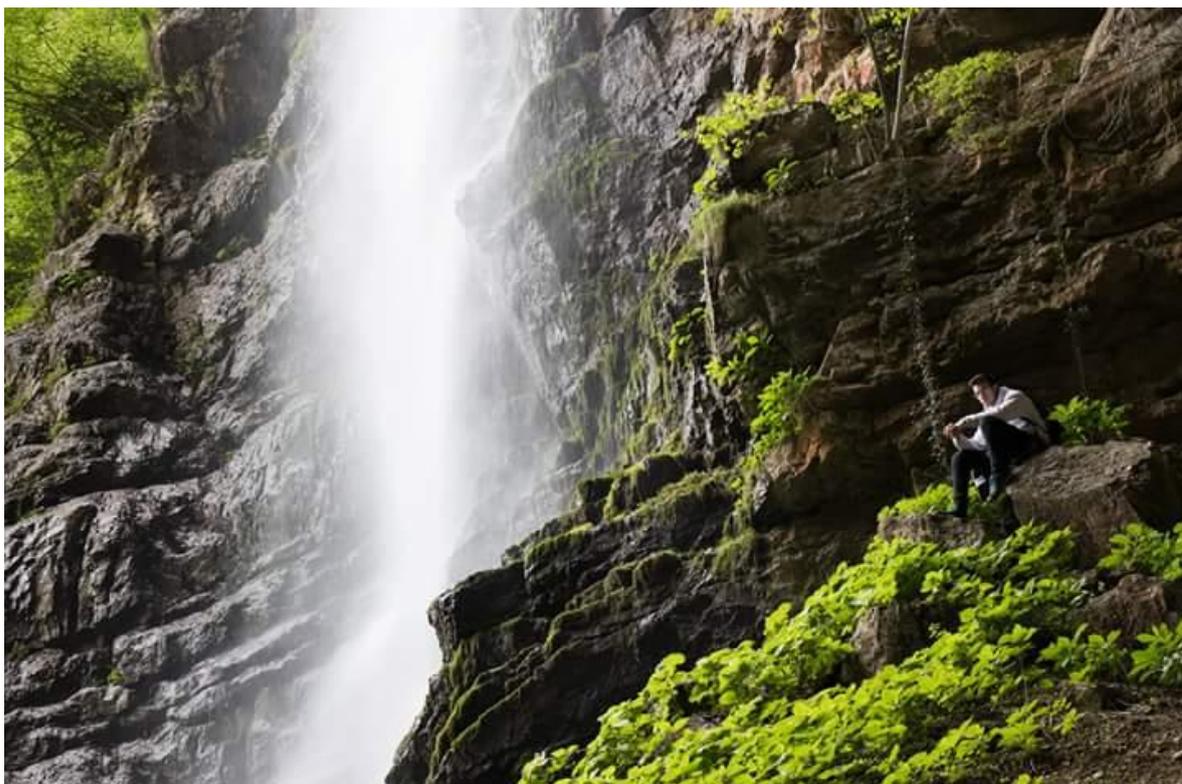
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1 INTRODUCTION

The handbook's objective is to provide a framework for developing wellbeing tourism in the Adriatic – Ionian region.

Purpose

The specific aims are to:

- Deepen understanding of wellbeing tourism and provide insight into the Adriatic – Ionian region's wellbeing tourism products, destinations, and development potentials.
- Provide practical guidance for wellbeing tourism, including planning, development, and promotion based on identifying and assessing resources, market trends, and distribution channels.
- Foster wellbeing tourism by inspiring stakeholders through good European practices and best-case examples in the Adriatic – Ionian region.

Users

The handbook is developed with several potential users in mind:

- National, regional, and local tourism (boards, associations) and destination management organisations on how to boost wellbeing tourism development, marketing, and promotion.
- Tourism product and service providers to get ideas on how to introduce wellbeing tourism products into their existing and new offerings.
- Policymakers to improve regulatory framework and funding for development of wellbeing tourism.
- Scholars and students of tourism and related programs to broaden their understanding of this emerging concept.

Context

The entire Adriatic – Ionian region economically depends on tourism for income and jobs. Sustainable tourism development, based on its responsible management, is, therefore, of paramount importance. More so, general sustainable development of the Adriatic – Ionian region is, to a large extent, dependent on sustainable tourism.

The importance of tourism is reflected in the European Strategy for the Adriatic – Ionian Region (EUSAIR). It is one of four macro-regional strategies of the European Union arising from a desire to boost regional integration of Europe, launched in 2014. The Member States (MS) of the EUSAIR region include Albania, Bosnia and Herzegovina, Croatia, Greece, North Macedonia, Italy (Abruzzo, Apulia, Basilicata, Calabria, Emilia Romagna, Friuli Venezia Giulia, Lombardy, Marche, Molise, Sicily, Trentino, Umbria, and Veneto), Montenegro, San Marino, Serbia, and Slovenia. Four countries are members of the EU – Croatia, Greece, Italy, and Slovenia.

Figure 1.1. Countries and regions in the EUSAIR



The EUSAIR focuses on facing common challenges and utilising opportunities of strategic importance addressed through high-level cooperation. Its overall goal is to "promote sustainable economic and social prosperity in the region through growth and jobs creation, and by improving its attractiveness, competitiveness, and connectivity, while preserving the environment and ensuring healthy and balanced marine and coastal ecosystems."¹

It is operationalised through the Action Plan², which defines four pillars, one of which is 4: Sustainable Tourism, given the economic importance of tourism to the region and the common sustainability challenges. The pillar³ is focused on two areas:

- Diversified tourism offers (products and services) – full use of the unexploited potential of the region, combating seasonality, improvement, and diversification of the quality of tourism products.
- Sustainable and responsible tourism management (innovation and quality) – reduction of the impact of mass tourism, involvement of all potentially interested stakeholders, and establishment of common standards and rules.

¹ European Union (2014), For a Prosperous and Integrated Adriatic-Ionian Region, available at <https://www.adriatic-ionian.eu/wp-content/uploads/2018/04/For-a-prosperous-and-integrated-Adriatic-and-Ionian-region.pdf>. p.2.

² European Commission (2014), Action Plan concerning the European Union Strategy for the Adriatic and Ionian Region. SWD (2014)190 final, available at <https://www.adriatic-ionian.eu/wp-content/uploads/2018/04/EUSAIR-ACTION-PLAN-17-June-2014.pdf>, p.53.

³ European Commission (2018), Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee, and the Committee of the Regions concerning the European Union Strategy for the Adriatic and Ionian Region, available at https://www.adriatic-ionian.eu/wp-content/uploads/2018/02/com_357_en.pdf, p.6.

Wellbeing tourism reflects both the need to diversify tourism products and services and to improve the region's tourism management through quality and innovation.

Wellbeing, as a concept, is gaining prominence in policy and practice, most commonly within the sustainability agenda. Sustainability and wellbeing go hand in hand. People, in general, are increasingly concerned with their wellbeing and that of the society and environment as they face mounting and diverse crises – economic, health, energy, climate, or safety. There is an urgency to do something about it at political, academic, and individual levels. Health and wellbeing are one of the United Nations' Sustainable Development Goals. In Europe, there is a drive to embed the wellbeing concept in the broad political framework. In 2019, the Council of the European Union⁴, spearheaded by the Finnish presidency, endorsed the economy of wellbeing. It is defined as a policy and government approach to put people and their wellbeing at the centre of policy and decision-making by creating an environment that enables people to reach their full potential and enjoy their fundamental rights. It is argued that the measurement of progress through GDP is based on the idea that people and governments should serve economic progress; the wellbeing economy works the other way around⁵. The wellbeing economy puts people at the centre, with the economy being in service of their wellbeing. Countries such as Iceland, New Zealand, Scotland, Wales, and Finland have established the Wellbeing Economy Governments Partnership⁶ to advocate the wellbeing economic model over GDP-led growth. Slovenia uses wellbeing measures in designing, monitoring, and evaluating national development strategies; France, Italy, and Sweden use wellbeing indicators for budgetary purposes; New Zealand is the first in the world to implement the wellbeing budget in 2019.⁷

The concept of wellbeing is also gaining importance in science and the professional world of tourism. There, wellbeing is explored as a mechanism for achieving significant progress in sustainability, as an innovative tourism product in itself, or as a desirable, more sustainable outcome of a variety of complementary tourism experiences. This handbook will address wellbeing tourism as a specific tourism product. Nevertheless, the three perspectives will be briefly discussed in the following chapters for a broader understanding of the concept.

Structure

This handbook is divided into several logically organised sections. The following chapter describes the main features of wellbeing tourism, starting with its definition, market characteristics and critical success factors, before evaluating wellbeing tourism in the Adriatic – Ionian region. The elements of wellbeing tourism are then identified to inspire the regional stakeholders. Finally, the examples of the wellbeing-related practices from the region illustrate how the wellbeing concept may be applied and create awareness that wellbeing products, services and experiences are already available in the region without explicitly using the wellbeing terminology.

⁴ Council of the European Union (2019), Council's conclusion no 13432/19 on the Economy of Wellbeing, available at: [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52019XG1126\(06\)&rid=5](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52019XG1126(06)&rid=5)

⁵ WWF World Wide Fund for Nature (2020), Toward an EU Wellbeing Economy: A fairer, more sustainable Europe after Covid19. Brussels: WWF.

⁶ McLeod, A., Rayner, L. (2022), Solidarity, sustainability and well-being at the heart of the EU mission. European Policy Center, available at: <https://www.epc.eu/en/publications/Solidarity-sustainability-and-well-being-at-the-heart-of-the-EU-missi~495188>

⁷ Llena-Nozal, A., N. Martin, Martin, F(2019), "The economy of well-being: Creating opportunities for people's well-being and economic growth", OECD Statistics Working Papers, No. 2019/02, OECD Publishing, Paris, <https://doi.org/10.1787/498e9bc7-en>.



2 WELLBEING TOURISM

In order to reduce seasonality, improve sustainability and increase tourism competitiveness, the Adriatic-Ionian region is focusing on expanding its product portfolio with an emphasis on innovative tourism offers. The national tourism strategies of the countries in the Adriatic-Ionian region identify health and wellness tourism as a strategic priority to meet increased market demand and to take advantage of often underutilised resources. A review of their strategies and promotional activities shows that they focus on narrowly defined wellness and health offerings, such as traditional spas and wellness hotels, and are slow to respond to the large and rapidly growing demand for a range of wellness experiences, products and services that can support the attractiveness of regional tourism.

The purpose of this chapter is, therefore, to:

- Define wellbeing tourism and provide terminological clarity in this respect.
- Build a theoretical foundation for regional wellbeing product development.
- Provide insights into key market trends shaping wellbeing tourism supply and demand.
- Outline critical success factors for wellbeing product development.

Definition

Wellbeing tourism is a type of tourism aiming to promote and maintain the health of the body, mind, and soul, striving for a continuous state of balance and harmony. It consists of products and services based on sustainable and harmonious interaction with the environment and the community.^{8,9}

It builds on a definition of wellbeing in general, defined as "a multidimensional state of being describing the essence of positive health of body, mind, and soul. It is an individual issue, but is manifested only in congruence with the wellbeing of the surrounding environment and community".¹⁰

The concept of wellbeing tourism emerged relatively recently in the north-European countries as an outcome of a decade of research into wellbeing in general and tourism's contribution to the individual, social and environmental wellbeing of tourists and destination communities.

There are six pillars of the wellbeing tourism concept¹¹. Its external dimension relates to environmental, social, and economic wellbeing, while the internal consists of physical (body), mental (mind), and spiritual (soul) wellbeing.

Conceptualised in this way, wellbeing tourism is at the intersection of the individual and collective realms. It promotes the holistic health of individuals and the environment. It is sustainable at its very core, as personal wellbeing cannot be achieved without the wellbeing of the external economic, social and natural environment. It goes beyond sustainability since it accounts for internal

⁸ Lindell, L., Dziadkiewicz, A., Sattari, S., Misiune, I., Pereira, P., Granbom A. (2019). Wellbeing tourism and its potential in case of regions of South Baltic. Lakmar: Linnaeus University. Page 11.

⁹ Lindell, L., Sattari, S., Hockert, E. (2021). Introducing a conceptual model for wellbeing tourism – going beyond the triple bottom line of sustainability. *International Journal of Spa and Wellness*. DOI:10.1080/24721735.2021.1961077.

¹⁰ Hjalager, A., Huijbens, E.H., Nordin, S., Konu, H., Tuohino, A., Björk, P., & Flagestad, A. (2011). Innovation in well-being tourism in the Nordic countries. *Current Issues in Tourism*. Vol 15(8):725-740. Oslo: NICe. Page 10

¹¹ Lindell, L., Dmitrzak, M., Dziadkiewicz, A., Jonsson, P.M., Jurkiene, A., Kohnen, J., Melbye, K., Steimle, M., Verstift, S. (2022). Good practices in wellbeing tourism. Lakmar: Linnaeus University.

(individual) and external (environmental) aspects of human existence. It is closely related to health and wellness tourism to the extent that the focus is on the individual. In its external dimension, it can be a driver of positive social change, and it is, therefore, closely aligned with ideas of transformational, conscious, and responsible tourism.

The relative novelty of wellbeing tourism and its position at the intersections of other more established products and services creates a definitional problem, confusing practitioners and policymakers. In particular, in the framework of wellness tourism, wellbeing is considered to be the ultimate aim of wellness. Wellness is a way to attain a state of wellbeing.

Both the wellness and tourism industries take this position. According to the Global Wellness Institute, the concept of wellness encompasses physical, mental, emotional, spiritual, social and environmental dimensions. Similarly, wellness tourism is defined as a pursuit to improve the wellbeing of body, mind and spirit. It encompasses discovery, connection, transformation and fulfilment through fostering positive relationships between people, cultures and nature. The World Tourism Organisation goes even further, arguing that wellbeing can be an outcome of many types of travel experiences but not the product in its own right.¹²

Proponents of wellbeing tourism as a specific form of tourism argue that, in practice, a clear distinction can be made between wellbeing and wellness tourism¹³. In terms of products, wellbeing tourism includes activities that provide pleasure and a sense of fulfilment beyond pampering, often through active enjoyment and/or physical activities. It is a combination of factors such as quality of life, happiness and satisfaction that can be achieved through non-material means such as distance from everyday life, relaxation and nature. In contrast, wellness tourism product often stands for a certain level of pleasure, pampering and luxury. It is based on the consumption of products and services through hedonistic consumption and is often seen as indulgence in spa and beauty treatments.^{14,15}

Tourism practitioners, therefore, differentiate between wellbeing and wellness. In their opinion, wellbeing is associated with activity (i.e., training, physical activity), while wellness is a passive enjoyment and pampering (i.e. spa, beauty), often connotating luxury and high quality.¹⁶ In contrast to wellbeing, wellness is a more consumptive practice. The needs of wellness tourists are satisfied through spa complexes, resorts, and hotels offering a range of facilities and services focused on beauty and pampering, recreation, fitness, and nutrition programs with, but not necessarily, medical supervision.

To the extent that, in its external dimension, wellbeing tourism might be a force for a positive societal change, it can also be a part of transformational tourism – a term more often used by scholars and, closer to a broad public, responsible, conscious tourism or regenerative tourism.

¹² Grenman, M., Raikkonen, J. (2015). Wellbeing and wellness tourism – same but different. Conceptual discussion and empirical evidence. *Matkailututkimus*. 11(1):7-25.

¹³ *Ibid.*

¹⁴ *Ibid.*

¹⁵ Konu, H., Laukkanen, T. (2010). Predictors of tourists' wellbeing holiday intentions in Finland. *Journal of Hospitality and Tourism Management*. 17:144-149,

¹⁶ Grenman, M., Raikkonen, J. (2015) Wellbeing and wellness tourism – same but different. Conceptual discussion and empirical evidence. *Matkailututkimus*. 11(1):7-25.

A closely related to wellness is health tourism. Health tourism is the broadest term that encompasses specific products and services relating to restoring, maintaining, or improving health. Consisting of practices to improve health, restore health (after illnesses or surgeries), and medical procedures, it is best understood as an umbrella concept but of limited use to guide specific product developments.

For the development of wellbeing tourism in the Adriatic-Ionian Region and the consistency of the terminology used, wellbeing tourism is understood as a type of tourism in its own right in this handbook for several reasons.

First, health and wellness tourism products are already developed to varying degrees in the Member States; their problems relate to investment, renovation, repositioning in the market, rejuvenation of resorts and changes in the regulatory framework (public/private health insurance, legal status, ownership and the like), which requires the coordination of a variety of government agencies, private actors and significant investment. Its development path is well-established and understood by relevant stakeholders.

Secondly, in the Adriatic-Ionian Sea region, the most common product of wellness tourism is the service of individual wellbeing. Moreover, wellness tourism is often associated with traditional health resorts (usually waters with therapeutical properties) that offer a combination of health, wellness and recreation facilities or hotel-based spa/wellness centres. Furthermore, wellness tourism is often associated with luxury hotels, although it is now considered a must for hotels, regardless of the hotel's market positioning. This narrow view of wellness tourism in the Member States leaves unrecognised a whole range of innovative, small-scale, rural tourism products designed explicitly with wellbeing in mind.

Thirdly, the region needs to widen its tourism product portfolio, expand the season and achieve even regional development - this can be accomplished by innovative tourism products falling under this broad umbrella of wellbeing tourism. This handbook is a tool to inspire stakeholders to introduce new or supplementary products and services and policymakers to provide tools and regulatory frameworks to assist them in their endeavours.

Market

Given the ambiguity surrounding wellbeing tourism and the fact that it is a relatively new tourism product, as described in the previous section, estimating market size is difficult. For this reason, estimates are derived from the complementary wellness market, for which comprehensive statistics are available.

Size

In 2020, the pandemic year when travel was heavily constrained, the Global Wellness Institute estimated US\$436 billion in expenditure on wellness travel. The size of the market decreased in 2020 by 40 per cent, but it recorded an 8 per cent average annual growth rate between 2017 and 2019. Demand is heavily geographically concentrated, with five countries (US, Germany, France, China, and Japan) accounting for 64 per cent of the global market; twenty countries, including Austria, Switzerland, Italy, UK, Spain, Portugal, and Denmark, account for 87 per cent of the worldwide market. The market is driven by the so-called secondary wellness market, where wellness

is not a primary travel motivation. The Institute has estimated a 21 per cent average annual growth rate to 2025 for wellness tourism (18 per cent for thermal springs and 17 per cent for spas).¹⁷

Globally, Europe has the most wellness trips. In the EU, a study was conducted in 2017 on behalf of the Transport and Tourism Committee on health tourism, defined as tourism that includes medical, wellness and spa tourism. It was estimated that the market segment accounts for about 5 per cent of total tourism and 4.6 per cent of total tourism receipts, with wellness tourism accounting for 60 to 74 per cent of health tourism. The market is estimated to grow by about 2 per cent per year. Regarding overnight stays, health tourism in the EU comprises 233.7 million guest nights for domestic trips and 16.7 million for international trips, for 250.4 million in total. The average stay for domestic trips is 4.1 nights per trip and 8.5 nights for international trips.¹⁸

It is not clear whether wellness tourists spend more. According to the study mentioned above focused on Europe, there are no differences in per-trip expenditure between health and other tourists¹⁹. However, the Global Wellness Institute's data indicated that international wellness tourists spend 35 per cent and domestic 177 per cent more than the average tourists, attributing this pattern of expenditure to education, disposable income, and travel experience of wellness tourists.²⁰

The demand for wellbeing tourism is likely to increase steadily. A year ago, as the borders slowly opened, 10 per cent of Europeans wanted a wellness and relaxation trip, especially young millennials (25 - 34 years) travelling with a partner. About 12 per cent of Europeans preferred nature and outdoor trips, especially those aged 35 - 44, with family or a partner. This is explained by a strong desire for relaxation and unwinding with a preference for experiences that improve emotional, mental and physical wellbeing as people become increasingly concerned about work-life balance.

Demand

As people start to understand that climate change is a severe threat to planetary survival, they demand a meaningful response from businesses and policymakers, especially the younger generation. They want to travel sustainably, including transport, accommodation, and destination products and services. They want to be assured that they will contribute positively to the local community, as they seek authentic, local, and eco-friendly.²¹ In Europe, this is reflected through increased demand for off-season trips, fewer but longer trips, less popular/crowded destinations, paying more to offset carbon footprint and dedicating time to support local communities.²² Growing global middle class, population ageing, increase in chronic disease are socio-demographics pushing up demand for wellbeing motivated travel.²³

¹⁷ Global Wellness Institute (2021) The global wellness economy: Looking beyond COVID. Miami: Global Wellness Institute.

¹⁸ Mainil, T, Eijgelaar, E, Klijs, J, Nawijn, J, Peeters, P., 2017, Research for TRAN Committee – Health tourism in the EU: a general investigation, European Parliament, Policy Department for Structural and Cohesion Policies, Brussels

¹⁹ *Ibid.*

²⁰ Global Wellness Institute (2021) The global wellness economy: Looking beyond COVID. Miami: Global Wellness Institute.

²¹ World Travel and Tourism Council (WTTC) (2021) A net zero roadmap for travel and tourism: Proposing a new target Framework for the Travel & Tourism Sector. London. Available at https://wtcc.org/Portals/0/Documents/Reports/2021/WTTC_Net_Zero_Roadmap.pdf

²² European Travel Commission (2021) European attitudes towards responsible travel choice. Brussels: The European Travel Commission.

²³ Global Wellness Institute (2021) The global wellness economy: Looking beyond COVID. Miami: Global Wellness Institute.

Sustainability and wellbeing are dominant themes, and tourism demand reflects these global consumer trends, where many changes are taking place. The key consumer trends, reflecting the two dominant themes, are driving demand for wellbeing/wellness tourism.^{24,25}

- **Environmentally conscious consumption**
The pandemic has heightened the so-called 'eco-anxiety', and individuals, businesses and governments feel an urgent need for economic and social justice. This has accelerated the already noticeable trend towards environmentally conscious consumption, favouring products and services that act in the spirit of sustainability and communicate this transparently. Consumers, especially Millennials and Generation Z, are also changing their behaviour, for example, by reducing plastic consumption, avoiding waste and recycling; environmental impact is increasingly considered in their travel decisions
- **Desire for passion and purpose-driven actions**
The Covid 19 pandemic exacerbated the already emerging shift in values, lifestyles and goals. Health and work-life balance are high on the agenda. Products and services that promote personal mental and physical health are in demand. People prefer experiences instead of things, actions and decisions that have a positive impact on society and the environment; spirituality becomes important in life. Services and products need to be designed to support this need for personal change and growth.
- **Lifestyle focused on self-care, health, and happiness**
As people prioritise their wellbeing - especially self-care, self-acceptance and inclusion - they seek products and services that enhance their physical, emotional or mental wellbeing. Whereas in the pre-pandemic era, they were seen primarily as pampering, wellness practises have become a means of self-preservation and survival. Stress reduction and wellness activities include not only massages, but also meditation, herbal remedies, yoga, spa and counselling therapies. They also include home-cooked meals, human relationships, rest and exercise.
- **Appreciation for rural and natural spaces**
During the pandemic, people have turned to nature and rediscovered its healing and nurturing influence on their wellbeing. They have come to appreciate better air, less congestion and a more uncomplicated life - factors that will continue to attract urban populations to the countryside. Nature will become an enduring part of wellbeing, from exercising outdoors, appreciating wildlife, and enjoying natural landscapes to discovering hidden beauty. This change in consumer values motivates businesses to adopt regenerative and environmentally friendly measures in the long term.

Supply

Wellbeing tourism supply focuses on products and services that have internal (physical, mental, and spiritual) and external (environmental, social, and economic) wellbeing as an outcome.

²⁴ Angus, A., Westbrook, G. (2022) Top 10 global consumer trends 2022. London: Euromonitor International.

²⁵ Global Wellness Institute (2021) The global wellness economy: Looking beyond COVID. Miami: Global Wellness Institute.

This approach is taken up by Scandinavian wellbeing tourism²⁶. Essentially, tourism entrepreneurs are encouraged to identify and promote aspects of their services and management that fit into the concept of wellbeing. They are encouraged to do good by offering sustainable services and products that promote harmony and balance for body, mind and spirit. They also recognise that no company can offer all aspects of wellbeing.

Examples of Scandinavian wellbeing services and products include a peaceful stay in the cabins among the trees with well-balanced breakfast, holistic specialist-led programs, and relaxing activities; or "Lavender place" – a combination of lavender wellness and SPA, natural cosmetics workshops, inviting visitors to 'dive into their own mind' in the salt cave, do good by supporting locals as they do. Or amber jewellery shopping experience, which is 'relaxed and calm, fitting more the external dimensions of wellness through partnering with regional enterprises and donating to local events.

There are several benefits of this approach. Firstly, stakeholder awareness of the multi-faceted nature of wellbeing is built, the myriad of wellbeing practices have a unified concept, and entrepreneurs are motivated to keep expanding wellbeing practices. Secondly, it unites stakeholders under a single wellbeing purpose. Thirdly, it helps in destination branding.

While this approach is inspiring and exceptionally cleverly formulated in a quest for improving the overall sustainability of the tourism industry and communicating it effectively, one has to bear in mind that the whole notion of wellbeing tourism in the North rests on the well-developed culture of wellbeing practised in daily life. While the destinations of the Member States cannot simply copy this approach, its elements are inspiring. They can be incorporated into the wellbeing tourism endeavours of the Adriatic-Ionian region.

In essence, the critical element of wellbeing tourism is nature. Nature is at the core of wellbeing – peaceful villages and beautiful landscapes, with or without natural healing remedies (mineral or thermal waters), promote relaxation, comfort, and escape, enable various nature-based activities, and foster physical, spiritual, and mental wellbeing rejuvenation. Nature is the core of wellness. There is a trend of bringing nature indoors, following biophilic design, defined as incorporating natural material, light, and forms into a built environment.²⁷

Facilities for wellbeing tourism are highly diverse, from traditional spas or wellness centres or hotels to simple eco-cabins in pristine nature.²⁸ Creating a wellbeing tourism product is much more to do with a philosophy reflected in the products, programs, and services, than in the tangible product.

Wellbeing service providers incorporate eco-friendliness and community immersion in daily operations and communicate it effectively. It might be from the ban on the use of plastic, strict non-smoking policy, participation in an eco-certification program to engaging visitors in activities beneficial for the environment or communities by including a day or half a day voluntary activities in their program of activities.

²⁶ A portal of Scandinavian wellbeing tourism at <https://wellbeingtourism.com/>

²⁷ Skift; Octave Institute (n/d) The tale of global wellness travel: Where the sector is headed next, at: <https://skift.com/wp-content/uploads/2019/10/The-State-of-Global-Wellness-Travel-Where-the-Sector-Is-Headed-Next.pdf>

²⁸ Pesonen, J., Komppula, R. (2010). Rural Wellbeing Tourism: Motivations and Expectations. *Journal of Hospitality and Tourism Management*. 17(1):150-157.

The wellbeing approach means that traditional spa and wellness facilities are evolving from simple spas, pools, massages and fitness concepts to more holistic programmes. They have realised that their customer segments have incorporated wellbeing into their lifestyle and expect the same from a holiday. Classic massage and beauty treatments are being expanded into a themed spa experience that combines unique regional highlights (e.g. wine-based therapies and beauty products in wine regions) and introduces new practises such as reiki, sound healing, forest baths, crystal therapies or guided meditation.

Retreats have become very popular as part of the general broader quest for the health and wellbeing of body, mind and spirit. Retreats are places of peace, tranquillity, privacy or safety where holistic activities are practised. They offer a combination of wellness and spirituality through a holistic approach to personal development with activities such as yoga, meditation, outdoor activities and special diets. However, unlike general wellness centres, retreats focus on gaining spiritual or religious insights; retreats promote personal transformation by facilitating mind and body restoration, relaxation, a positive attitude and clear thinking, leading to improved self-identity. Retreats can take place in traditional accommodation (e.g. hotels, spa hotels) but are often organised in remote mountain huts, island villas or even on sailboats. Retreat themes are varied and often combine several practices: silent retreats, detox (food, drink, technology), yoga, mindfulness, stress management or family harmony. Although there are many forms and themes, they must be sustainable and ecological.

Food and drink are part of the overall wellbeing offer. At the very least, tourists expect the same or better selection of products that they consume at home. They see their holiday as an opportunity to better themselves, including paying attention to what they eat. Naturally, they prefer locally grown and organic, natural foods, less meat and more vegetables, dairy alternatives and a low-sugar diet. In addition, the programme includes a personalised nutrition plan developed with a certified counsellor, detoxification sessions and cooking classes.

Sport and exercise are part of the wellbeing tourism products. While destinations often provide many opportunities, such as trails for walking, hiking, or cycling, nowadays, entire holidays are dedicated to personal fitness, often in partnership with global fitness leaders. Many operators offer holistic boot camps combining high-intensity exercise with yoga, some spiritual practices, and healthy nutrition.

Creativity is also seen as a path to wellbeing. Creative tourism offers people the opportunity to develop their creative potential by participating in workshops and seminars at a destination. Creativity facilitates self-discovery, self-reflection and self-identity, leading to greater self-confidence, mental health and quality of life. The power of art in healing has been recognised in psychology, and art therapies are widely used on the premise that art is "a transformative act of critical consciousness". Art therapies are now offered not only in the context of institutionalised mental health care but also in the realm of wellness tourism, used to address crises and restore a healthy balance in life.²⁹

²⁹ Steiner, C., Reisinger, Y. (2006). Ringing the fourfold: a philosophical framework for thinking about wellness tourism. *Tourism Recreation Research*. 31(1):5-14.

Critical success factors

Sustainability is the central theme because wellbeing tourists have the attitude of caring for the environment, giving back to society and looking after other people and the planet. They have integrated sustainability activities and measures into their lifestyle. They also want purposeful travel that goes beyond their personal benefit. Wellbeing tourists want to see how their travel providers incorporate environmentally friendly practises and social engagement, and travel providers need to know how to communicate this effectively. Well-being tourists also want to be part of the process through volunteering, which partly explains why voluntourism is so popular. Travel providers could incorporate volunteering activities into their guests' stay programmes - from an afternoon at a nursing home to a day cleaning up a park or forest.

Food and beverages must be seen as part of a holistic offer. As travel is the time to advance their overall physical and wellness goals, food and beverage are integral to that process. Wellness travel providers need to be aware of their preferences - more vegetarian and vegan offerings, organic, natural and locally grown food, low sugar, dairy alternatives and the like. The Adriatic-Ionian Sea region is well positioned to respond to these trends with its healthy Mediterranean diet, the many foods and herbs with healing properties and the many small farms that can meet local demand. Another plus point is individually tailored nutrition programmes put together by qualified nutritionists.

Sport and exercise are an integral part of wellness holidays, which are demanded in varying amounts of time and intensity depending on the population group. Holistic programmes that combine physical activity, meditation practice, yoga and healthy eating are in demand. Intensity can range from boot camps with high-intensity exercise to recreational activities to improve personal fitness to outdoor recreational activities to enjoy nature. A fitness centre, whether a small room with a few fitness machines or a complex one with a variety of exercises and programmes offered as an additional stay at a resort, is not attractive to the wellness market.

Mental health is at the heart of wellbeing travel, with the need for stress reduction and, more recently, digital detoxification coming to the fore. Member States have a great comparative advantage regarding the natural environment that promotes both. Mindfulness practises through which one can self-reflect, learn to live in the now and relieve stress, combined with digital detoxification, are in high demand. Such retreats can be elementary facilities in a quiet and pleasant environment, with spaces to meditate, cook and explore nature.



3 WELLBEING TOURISM IN THE REGION

Tourism is generally an important economic sector for the countries of the Adriatic-Ionian region. The region's main attractions are long coasts with beautiful bays, islands and picturesque villages, mountains, sparsely populated landscapes offering numerous water and nature activities, and historical and cultural heritage. Like the tourism industry, their wellbeing tourism is unevenly developed, with Italy and Slovenia leading the way. This chapter aims to:

- Assess the state of wellness development in the Member States.
- Identify potentials and challenges for the regional development of wellness tourism products.

State of development

The Member States are endowed with numerous thermal and mineral springs, which have been used since ancient times. These remedies were also the cornerstone of modern tourism when wealthy citizens from polluted industrial cities visited spas, health and mountain resorts for healing and recreation. After the Second World War, health tourism in the Member States developed in the same direction. The spas that emerged from this tradition have developed into medical centres for the rehabilitation of the local population, financed by national health insurance funds. Some countries, such as Italy or Slovenia, have abandoned this model and transformed their spas into modern health, leisure and recreation complexes accompanied by health and wellness hotels. Others, however, are still in the process of transformation, where the entire infrastructure of thermal spas or health resorts, including accommodation, facilities, services and treatments, needs to be improved.³⁰

To assess product development in the Member States, national plans (tourism development strategies, marketing strategies/plans and action plans) were analysed to identify the current state of development and plans for the future. Official tourism websites were subjected to content analysis to identify and assess how countries highlight their wellbeing-related tourism resources and whether they use them in their (main or thematic) messages.

There is currently a strategic push in the region to develop health tourism. Health and wellness tourism is highlighted in the tourism development strategies of all Member States.

- Italy promotes relaxation, wellness and spirituality on its official tourism website as a means to balance body and mind, relax and feel good. Spas and hot springs, wellness and detoxification experiences, sanctuaries and spiritual walks that incorporate the healing quality of nature (tree-hugging, therapeutic landscape) are promoted as specific products. It is based on its Strategic plan for the development of tourism 2017 – 2022, where health, wellness and spa are singled out as priority products to be marketed by the National Tourism Board (ENIT).
- Similarly, San Marino identifies wellbeing as one of the three most essential products in its tourism development strategy. Wellbeing is understood holistically, including its external and internal dimension. San Marino initiates and joins projects related to wellbeing, such as

³⁰ Smith, M., Puczkó, L., Michalkó, G., Kiss, K., & Sziva, I. (2016). Balkan wellbeing and health tourism study. Budapest: Metropolitan University.

Lovely Places – a sustainable tourism itinerary of San Marino, Romana and Marche focus on nature and culture

- Slovenia has even gone a step further by including health and wellbeing in its tourism vision. In its advertising, experiences are categorised as health, pampering, treatments and water experiences in the spa. Well-being is the ultimate goal of wellness experiences, achieved through local natural products, saunas, sound therapy, a variety of yoga, nature or forest healing paths, Asian practises, meditation and outdoor activities. They also promote 'selfness' as a lifestyle focusing on physical and mental health.
- Croatia has put health tourism high on its product portfolio in its national tourism strategy with a dedication health tourism action plan. The product is promoted under the slogan „Croatia – full of wellbeing!“, a variation of its overarching brand „Croatia – full of life!“. The entire country is promoted as a country of special energy and healthy living with experiences embedded in nature, scents, and air through nature-based activities and relaxation in thermal spas. The quality of wellness services in hotels is very good, while traditional spas are undergoing a transition from health to wellness-based facilities.
- Greece also takes advantage of its abundant water healing resources that have been used since ancient times. Its strategic marketing plan prioritises the promotion of special interest products, including health and wellness, the latter in the context of luxury. This strategic focus on luxury wellness is reflected in the product promotion as "luxury time in wellness and spa centres", built on a long tradition of wellbeing and health practises as a source of holistic health. In terms of specific product positioning, the hundred natural spas are grouped under the term "health and wellness"; the natural cosmetics and treatments as "nature love beauty", while the wellness centres in rejuvenating nature represent "wellbeing in the land of the sunshine".
- Montenegro has recognised the demand for healthy holidays. It has prioritised health tourism in its tourism plans (National Tourism Development Strategy and a Health Tourism Development Action Plan) and its Smart Specialisation Strategy. However, the strategic focus is on wellness and medical tourism, while modern holistic wellness or wellbeing trends are not recognised. Nevertheless, the strategy aims to promote environmentally friendly and responsible tourism by supporting eco-accommodation and products that promote healthy lifestyles, which indirectly alludes to wellbeing tourism products.
- North Macedonia has traditionally offered medical treatments for the domestic market in its health and spa facilities and has identified the need to modernise this sector as a strategic priority. Therefore, the development of a modern spa complex has been declared a flagship tourism project. The health and wellness product has a modest presence in advertising, with five spas being promoted to potential visitors. There is no direct or indirect reference to the wellbeing tourism product.
- Serbia has also made health (spa and wellness) one of its priorities. According to the National Tourism Development Strategy, the product has two dimensions: health with a focus on medical treatments (cosmetics, surgery, dentistry, exercise, nutrition, meditation)

and enjoyment in spas. Regarding the product, thirteen spa resorts are promoted as true ecological centres with abundant natural beauty, mineral water, clean air, health, wellness and spa centres.

- According to Albania's national tourism strategy, products related to well-being are outside their strategic focus. The overall objective of the Albanian strategy is the sustainable development of tourism with the consolidation of existing and development of new thematic tourism products, including health tourism. The only product advertised in the health and wellness section is Thermal Wellness, which focuses on the healing properties of thermal water and advertises five spas.
- Like Albania, Bosnia and Herzegovina's tourism strategy focuses on spa and health tourism to diversify its product range, with efforts to modernise and improve existing medical and rehabilitation treatment facilities. Official advertising does not refer to wellness, health or well-being.

Potential and challenges

Common to all Member States is the importance of tourism for overall development based on nature, culture and heritage. All Member States have a planned approach to tourism development, with the diversification of the product base to minimise seasonality and spread tourism geographically. The potential and importance of wellness tourism have been recognised in all Member States - they have identified a significant increase in demand for health and wellness lifestyle holidays on the one hand and resources on which to build this product on the other.

All Member States have in common a wealth of natural resources - water (thermal, mineral and seawater) with proven healing properties. Many such water springs have been used since ancient times and were popular in the late 18th and early 19th centuries. Since then, some spas have declined and disappeared from the tourist map, while others have managed to rejuvenate and reinvent themselves constantly.

There are also traditional, complementary and alternative therapies, often based on the healing properties of the climate, nature and plants. For example, thalassotherapy - the use of treatments with seawater - is still very popular in Member States bordering the sea. Climotherapy - the use of the climate to cure diseases - is also firmly established in the region. The use of plants to cure diseases or promote health remains popular in the Member States, and a variety of entrepreneurs have developed a wide range of local plant-based products. The Member States also have large areas of unspoilt nature with a more or less developed visitor infrastructure.

The demand for wellbeing products is also growing, as illustrated in the previous chapter, and the region is well-positioned to benefit from this trend. Moreover, not only is this beneficial for the tourism industry, but the focus on wellbeing can be a solid foundation for building sustainable, innovative and healthier communities. This seems crucial for Member States, as their populations - except for Italy - perform poorly in terms of wellbeing and health, have a below-average life expectancy, have low disposable income, and travel is generally not perceived as a factor that contributes to people's happiness and wellbeing.³¹

³¹ Global Wellness Institute (2022), *The Global Wellness Economy: Country Rankings*. Florida: Miami.

The shift from health and wellness to wellbeing would bring several benefits. First, the systematic approach to wellbeing tourism would create awareness among communities, entrepreneurs and policymakers that each region has a wealth of resources for developing wellbeing products and services. Suppose the Member States shift their focus from traditional health and wellness tourism with strategies to attract investment in large infrastructures (swimming pools and aqua parks, spa/sauna worlds, high-end accommodation, wellness centres) to wellbeing. In that case, opportunities will open up for new and innovative services by small and medium-sized enterprises and communities outside the main tourism hot spots that do not necessarily require massive investments in tourism and supporting infrastructure.

Currently, Italy (albeit with significant regional differences), Slovenia and, to some extent, Croatia have started to develop products and services focused on well-being. They are promoting leisure and recreational spas and a range of lifestyle services and experiences, from spiritual retreats to forest baths and energy trails.

In other Member States, the concept of wellbeing or holistic wellness is not widely recognised or accepted by policymakers, at least when judged by national tourism development strategies. The wellness industry is very competitive and investment intensive. Even more, there are already warnings that wellness and spa centres will become placeless experiences with standardised services if spa centres become a "must" in every decent hotel. The concept of wellness tourism provides a platform for regional differentiation based on resources, attractions, local traditions, community practices and the creativity of local entrepreneurs. It is encouraging that the concept is slowly being embraced by entrepreneurs and DMOs, as detailed in the fifth chapter on best practices in wellbeing tourism in the Member States



4 WELLBEING PRODUCT DEVELOPMENT

At the heart of wellbeing, tourism is the idea of developing tourism products and the entire tourism system of a destination into a sustainable development concept that contributes to economic development while improving people's well-being and the quality of their natural environment. The first step towards this goal should be the identification and assessment of the resources available at a destination.

Resources

Wellbeing tourism is strongly dependent on nature and climate. With its geomorphological diversity, nature provides a backdrop for all activities that lead to wellbeing. Recognising the close connection between people and nature, nature is considered a fundamental health resource. This influence of nature on improving individual wellbeing, increasing concentration and reducing stress and negative emotions are summarised in the concept of therapeutic landscape.³² These landscapes can be natural or designed. For example, healing gardens are purposefully designed for a variety of treatments.³³ The deliberate use of plants, gardens and nature in wellbeing is called garden therapy. Many treatments use nature as a healing tool for specific health problems such as autism, dementia and other special needs or a particular target group such as children.

Climate is equally important. Tourism flows are motivated to a large extent by the search for places where the climate makes the stay pleasant. The climate is used for healing, prevention of illnesses or enjoyment in a healthy environment. For centuries, spas were located in places with a climate conducive to healing. The Mediterranean climate and a stay by the sea were recommended for people with respiratory diseases; mountains, with their high-altitude climate, promote health and outdoor activities. In their search for places to improve or enhance their sense of wellbeing, people look for places where nature and climate support their health goals, while climate therapy is a well-established practice in conventional medicine.

Water generally attracts people. In the Mediterranean region, the use of seawater to prevent and cure diseases and to promote health has a long tradition. Sea water and aerosol are used for prevention and cure, and the sea, with its living organisms, is used in cosmetics and food supplements. Member States are well endowed with thermal and mineral waters and curative mud, as already mentioned. But lakes, waterfalls, rivers, streams and ponds also impact individual wellbeing through bathing, participating in water activities or simply through visual enjoyment.

Nature, climate, and water are the most common resources used in wellbeing tourism that need appropriate infrastructure to make them accessible. This infrastructure comes in a variety of shapes and forms:

- Wellness centres
- Wellness hotel and resort
- Medical hotel/clinic
- Leisure and recreation spas
- Hotel and resort spas
- Holistic retreats

³² Rathmann, J. (2021). Introduction. In Rathmann, J. (Ed) Therapeutic Landscapes. essentials. Wiesbaden: Springer.

³³ For more, see Healing Gardens Networks at <https://healinglandscapes.org/>

Services that they offer are varied:

- Natural healing – mud, climate, thermal waters
- Nature, environment, rural/therapeutical landscape landscape
- Medical services
- Traditional, complementary, alternative therapies
- Medical services – rehabilitation
- Spiritual traditions – yoga meditations reiki
- Culture of wellness – in terms of wellbeing

Natural and cultivated vegetation is another potential resource for wellbeing tourism. The region has a long tradition of using herbs to promote health and cure illness - chamomile, lavender, rosemary, lemon, sage, thyme and chicory are just a few that are traditionally used and embedded in people's daily lives. The sense of wellbeing can be generated by immersing oneself in the senses, picking or harvesting, participating in cultivation and deepening the knowledge and understanding of their traditional uses and applications.

Animals are also part of the wellbeing philosophy. The healing power of human-animal interaction is well-established in medical and related research. Animal-assisted therapy is recognised as an alternative medical treatment that usually involves using dogs, horses, cats and other farm animals. While animal-assisted therapy is a medical procedure, in tourism, a variety of contact with animals can benefit the feeling of wellbeing. Swimming with dolphins or horseback riding has been widely promoted for this reason. The transport sector has also embraced this idea. For example, therapy animals are used at airports worldwide to reduce passengers' stress and anxiety.³⁴ Another animal-related issue in tourism is travelling with animals, which has led to pet-friendly hotels and related services.

Artistic and creative practises also promote wellbeing. Art therapy is a treatment approach that combines psychotherapeutic techniques with the creative process to improve wellbeing, and is often conducted in a secluded natural setting. In addition, art and craft studios and artists often offer lectures and workshops that are part of a tourist offer. Traditional festivals and events offer visitors the opportunity to learn and immerse themselves in local communities, often even by participating in voluntary activities.

Events are indispensable components of wellbeing experiences, whether they focus on health and wellness in the form of conferences, conventions, workshops, exhibitions or sports. Endurance races combined with nutrition and spiritual practices are hugely popular. Religious events - pilgrimages or New Age meetings - are also part of wellbeing tourism.

When designed with wellbeing in mind, sports and recreation facilities are essential components of wellbeing tourism. Indoor sports facilities extend the range of activities available, especially in bad weather. Promenades, nature walks, theme trails, and hiking or cycling paths promote physical activity, enjoyment of nature and socialising. In contrast, healing, energy, health or therapy trails are specifically designed for recovery and holistic health.

³⁴ Velan, K. (2019). From Alligators to Pigs, Airport Therapy Animals Make Travelers Smile. APEX The Airline Passenger Experience Association. At: <https://apex.aero/articles/airport-therapy-animals/>

The destination as a whole must support the concept of wellbeing. Stakeholders need an appropriate attitude to welcome wellbeing tourists, and supportive management to facilitate entrepreneurship and collaboration between stakeholders. Destination managers, in particular, need to understand that many wellbeing service providers are mainly lifestyle entrepreneurs who offer wellness tourism products and services and do not see themselves as part of tourism as they perceive tourism negatively.³⁵

Rules and regulations

With wellbeing tourism encompassing a wide variety of practices, experiences and locations and spanning across all Member States, the legal framework is complex at the national level.³⁶

In a few countries (e.g. Italy, Greece, Serbia), there have been attempts to regulate wellness resorts/hotels by law, but the wellbeing concept goes far beyond this group of products. Some rules and regulations generally govern business operations for many aspects of wellness products and services. Most countries have laws for tourist accommodation, food and beverage delivery, employment in the industry, health certifications and standards with different government agencies responsible for tourism, spatial planning, economics, entrepreneurship, finance, health, education or similar.

In the context of this handbook, the main focus is on the rules and regulations that apply to the healing treatments and practises used under the umbrella of inner wellbeing - alternative and complementary therapies.

In 2017, there were 145 thousand medically trained and 160 thousand non-medical practitioners, while it is estimated that consumers spend almost one hundred million euros annually on alternative and complementary therapies. The EU is working on a harmonised approach to regulation.

In general, EU Member States' practices vary widely regarding training, certification, reimbursement and funding. The attempts in the EU to understand and regulate this area go back more than 20 years. For example, in the early 2000s, the Homoeopathic Medicines Directive and the Herbal Medicines Directive were adopted by the European Parliament. In addition, the European Parliament and the Parliamentary Assembly of the Council of Europe have recommended greater harmonisation of alternative practices in Member States. In 2012, the CAMbrella project, which aims to gain insights into the state of the sector and develop a roadmap for future research CAM, was funded by the Directorate General for Research and Innovation EC. In 2010, the Complementary and Alternative Medicine Group (CAM) was established as an informal group to keep CAM on the EU policy agenda and cover the whole spectrum of practices from holistic health to specific treatments. In 2017, the European Parliament's Committee on the Environment, Public Health and Food Safety organised a workshop on alternative and complementary therapies.³⁷ EUROCAM is an

³⁵ Ateljevic, I., Tomljenovic, R. (2017). Transformative tourism, social entrepreneurs and regenerative economy. Conference proceedings 6th International Scientific Symposium Economy of Eastern Croatia – Vision and growth. Osijek. Pp. 577-586. Dwyer, L., Ateljević, I., Tomljenović, R. (2017). Tourism Future: Towards Transformational Tourism. In: Dwyer, L., Tomljenović, R., Čorak, S. (eds) Evolution of Destination Planning and Strategy. Cham: Palgrave Macmillan.

³⁶ Mainil, T, Eijgelaar, E, Klijs, J, Nawijn, J, Peeters, P, 2017, Research for TRAN Committee –Health tourism in the EU: a general investigation. Brussels: European Parliament, Policy Department for Structural and Cohesion Policies

³⁷ Directorate General for Internal Policies – Policy department A: Economic and scientific policy (2017). Workshop proceedings on complementary and alternative therapies for patients today and tomorrow. At: [https://www.europarl.europa.eu/cmsdata/135562/ENVI%202017-10%20WS%20CAM%20%20PE%20614.180%20\(Publication\).pdf](https://www.europarl.europa.eu/cmsdata/135562/ENVI%202017-10%20WS%20CAM%20%20PE%20614.180%20(Publication).pdf)

association of patients, doctors and practitioners of traditional, complementary and integrative medicine that works to harmonise regulations across Member States. Their website provides a wealth of information on CAM and the current state of legislation.³⁸

Products and facilities

As amply pointed out, wellbeing tourism is more than health or wellness tourism. The ever-changing demand puts pressure on products and services to constantly improve existing and introduce new products and services to the current offer to expand it through creativity and innovation.

As the market booms and operates in a highly competitive environment, it is no longer enough to offer pools, spas, massages and beauty treatments. Water-based wellness facilities and services (spas, pools, treatments) are becoming the standard for hotels above 3*, leading to trivialisation that reduces their services to pampering - innovation is vital to stand out from the crowd. Keywords are themed spas based on regional specificities, cutting-edge technologies (e.g. guided mediation with virtual reality, sound healing/massage, non-invasive technological procedures such as Cool Sculpting) and a holistic approach.

In designing wellbeing products and services for wellbeing market, three elements need to be incorporated that respond to the three internal dimensions of wellbeing – physical, mental and spiritual:

- Physical include activities that can range from recreational walks to extreme sports, nutrition and wellness/spa for rest, relaxation and recuperation.
- Mental activities cover stress and anxiety reduction, paths to self-discovery/life purpose and detoxification programs, including technical detox.
- Spiritual, apart from religious practices of one's denomination, include a combination or adaptation of eastern techniques such as yoga/reiki and various meditation practices.

Through the interaction of facilitates, programs and staff, one has to design experiences that:

- Enable consumers to experience intrinsic motivations such as pleasure, whether derived from pampering or partaking in physical activity,
- have a more altruistic component that benefits other people, environments or communities, for example, by including a day of a half-day voluntary activities in communities in any program (feel good by doing good)
- create a sense of meaning for participants, contributing, for example, to their self-development.

The setting is equally important and contributes to the feeling of wellbeing. Settings that facilitate wellbeing are:

- Wellness facilities of various forms and profiles
- Nature for calm, health, enjoyment or activities
- Educational programs to promote self-discovery
- Farms and animals that allow enjoying a simple way of life and connection with the Earth
- Culture and tradition which is a source of appreciation for one's own and the achievements of others.

³⁸ <https://cam-europe.eu/>

Picture 4.1.



Facilities that enhance wellbeing must be constructed around three main characteristics of a hospitality product: service product, service delivery and service environment. As figure 4.1 illustrates, the characteristics that lead to improved visitor wellbeing are the quality of interaction between staff and guests (primarily trainers who need to be caring), voluntary participation (participants retain a degree of autonomy) in novel and stimulating activities within a structured daily routine (the structure facilitates the achievement of goals or competencies), the promotion of mindfulness practises (time for meditation, enjoyment of nature, staff psychologists, lectures on topics to understand better the human psyche, camaraderie among guests or the social aspect of the retreat, interaction with like-minded people).³⁹

Although this section focuses on one product, it is important to emphasise that the success of a wellbeing product is proportional to the reputation of a destination. The features of a destination contribute to mental recovery, and the environment, whether designed or natural, must support the concept. In the environment, experiences such as places of silence, places of spiritual power, herbal gardens, and areas for physical activity are some of the features of a successful wellbeing product.⁴⁰

Destinations that offer an experience bundle of relaxation and comfort (swimming in natural water, sauna, warm water baths), healthy food, and health-promoting and improving services (i.e. Nordic walking) are good reasons to set up wellbeing products and services.⁴¹

³⁹ Thal, K. I., & Hudson, S. (2019). A Conceptual Model of Wellness Destination Characteristics That Contribute to Psychological Well-Being. *Journal of Hospitality & Tourism Research*, 43(1), 41–57.

⁴⁰ Hjalager, A., Huijbens, E.H., Konu, H., Björk, P., (2011). *Innovating and re-branding Nordic well-being tourism*. Oslo: Nordic Innovation Centre

⁴¹ Ibid

Promotion

The overall aim of promotion is to create demand through advertising and selling. The former attracts the attention of the target markets and creates interest, and the latter creates a customer desire to consume the product and make sales.

In general, wellness products, services and destinations need to emphasise their uniqueness, authenticity and commitment to the internal and external dimensions of wellbeing. At the same time, their brand and advertising must appeal to the motivations of the target groups they wish to reach.

As with all tourism products, wellbeing tourists are motivated by pull and push factors. Push factors are the desire for relaxation, stress relief, rejuvenation, detoxification, healthy eating, varied activities, nature experiences, time outdoors, escape, health and beauty treatments.⁴² These factors are present in people's minds. Once identified, the search begins for a destination, products and services that best meet these needs in terms of facilities, services, programmes, environment and accessibility. These are pull factors wellbeing service providers communicate through advertising.⁴³

As far as market segmentation is concerned, there is no basis for segmentation based on socio-demographic characteristics.⁴⁴ However, a study on the rebranding and innovation of Nordic wellbeing tourism found that the experience appeals mainly to women aged 45 and older, as the current typical offerings for children, men and women of other ages lack a social dimension.⁴⁵

Some examples of market segmentation are from the Netherlands, where four segments are identified:⁴⁶

- RESTwell – traditional, price-conscious segment
- BEwell- segment recovering from illness
- STAYwell – segment focused on prevention and long-term health
- FEELwell – luxury segment seeking life balance and mindfulness

Market segmentation in the Nordic wellbeing product is based on three segments, based on psychographics (Figure 4.2.)

⁴² Pesonen, J., Laukkanen, T., Komppula, R. (2011). Benefit segmentation of potential wellbeing tourists. *Journal of Vacation Marketing*. 17(4):303-314.

⁴³ Konu, H., Laukkanen, T. (2010). Predictors of tourists' wellbeing holiday intentions in Finland. *Journal of Hospitality and Tourism Management*. 17:144-149.

⁴⁵ Hjalager, A., Huijbens, E.H., Konu, H., Björk, P., (2011). *Innovating and re-branding Nordic well-being tourism*. Oslo: Nordic Innovation Centre

⁴⁶ Hjalager, A., Huijbens, E.H., Konu, H., Björk, P., (2011). *Innovating and re-branding Nordic well-being tourism*. Oslo: Nordic Innovation Centre

Figure 4.2. Segmentation of the Nordic wellbeing demand



Providers of wellbeing experiences are advised to first think about the design of their advertising, integrating off- and online advertising and communication to facilitate direct sales. They should then engage with the destination's stakeholder networks and join different platforms, associations and certification schemes to improve visibility, ensure quality and increase reach.

Destination managers need to simultaneously identify what resources are available to them to support wellbeing products and market positioning. Identifying entrepreneurs whose existing or planned products and services are consistent with the idea of wellbeing tourism is equally important. In doing so, it is crucial to recognise that many of these providers are so-called lifestyle entrepreneurs who have often experienced work-related burnout, health problems or critical life events and decided to fundamentally change their lives by engaging in practices that were meaningful to them, often in the field of alternative therapies, while at the same time advocating for sustainable practise, fully recognising the interdependence between healthy individuals, healthy society and healthy environment. They are often unaware that they are part of the destination tourism system and often need support in building their client base.



The Nordic Wellbeing Project⁴⁷ has produced an excellent guide for entrepreneurs on promoting wellbeing products and services through visual and verbal communication, on social media and on websites, which can inspire wellbeing entrepreneurs and give them some tips and ideas on developing their promotional strategy or improving the existing one.

Distribution

The Member States of the Adriatic-Ionian region distribute their tourism products through large tour operators or on independent booking platforms (i.e. booking.com or airBnB.com).

⁴⁷ Nordic wellbeing project available at: <https://wellbeingtourism.com/app/uploads/2021/12/How-to-promote-Wellbeing-tourism.pdf>

However, because of the specific nature of the wellbeing products, smaller and more specialised distribution channels need to be used. Therefore, it is advisable to approach smaller and more specialised tour operators to promote wellbeing-related tourism products. Good starting points are directories of associations that specialise in wellbeing related products. Small specialised tour operators, especially those already selling compatible wellbeing packages in the region, are more likely to be willing to partner with new providers of wellbeing products, services or experiences.

Relevant tour operators can be identified via trade associations, events and databases.⁴⁸



There are several specialised tour operators.

fitREISEN GROUP FitReisen⁴⁹ is a German company founded in 1975, based in Frankfurt am Main, Hamburg, Leipzig, Munich and Starnberg. The company has stood for healthy holidays, attractive beauty, relaxation and leisure activities. In addition to Fit Reisen, the international brand SpaDreams, the online portal kurz-mal-weg.de, Yoga Escapes, Aytour, Lotus Travel and the travel voucher portal Tripz also belong to the group of companies. Today, the specialist offers over 9,500 different spa, health, beauty, Ayurveda, yoga, detox and wellness packages. The portfolio includes 1,500 hotels and 400 destinations in 50 countries. Brands in the group include:

- FitReisen⁵⁰ specialises in Ayurveda, spa, yoga, detox and anti-stress packages working with over a thousand hotels in 50 countries, including Greece, Italy and Croatia.

⁴⁸ Links: ECTAA; Global Wellness Summit; ITB; Wellness Tourism Association; World Spa and Wellness Convention; World Travel Market

⁴⁹ FitReisen at <https://www.fitreisen.de/group/de/>

⁵⁰ FitReisen at <https://www.fitreisen.de/>

- SpaDreams⁵¹ is an international offshoot of the FitReisen, offering services in 10 languages and selling holidays in 30 different markets. In the Adriatic – Ionian region, holidays are offered in Bosnia and Herzegovina, Croatia, Greece, Italy and Slovenia.
- YogaEscapes⁵² specialises in physical health and mental wellbeing through yoga practice, organising experiences worldwide; of the Member States, the company is active in Italy.



Health and Fitness Travel⁵³ is a large specialist tour operator from the United Kingdom, established in 2010. Their focus is on luxury wellness to improve people's wellbeing. Their retreats are organised worldwide including Croatia, Greece, Italy and Montenegro in the Adriatic – Ionian region. They offer several types of experiences: detox and weight loss, fitness, wellness, yoga and pilates, medical, spa, sports and adventure, for different kinds of travellers: singles, couples, families, adults only, weddings and honeymoons, LGBT. Their Discover Recover Holidays are specially tailored for immersion in local culture and wellness activities.

As wellness tourism is more than wellness, distribution channels can also be found by perusing associations and their membership in responsible, eco, adventure or transformational tourism. There are associations and portals on specific aspects of wellbeing services, such as:

- Transformational Travel Council⁵⁴ – an association of tourism stakeholders worldwide, under the motto "Creating better world through travel", featuring a membership base dedicated to wellbeing related, tourism, education and other resources
- BookDifferent.com⁵⁵ – a worldwide online travel agency for responsible tourism
- Much Better Adventures⁵⁶ - its mission is to create the world's best platform for the simple discovery and booking of active holidays, with a community of locally and independently owned businesses in the world's adventure hot spots.

⁵¹ SpaDreams at <https://www.spadreams.com/>

⁵² YogaEscapes at <https://www.yogaescapes.de/>

⁵³ Health and fitness travel at <https://www.healthandfitnesstravel.com/about-us>

⁵⁴ Transformational Travel Council at <https://www.transformational.travel/>

⁵⁵ BookDifferent at <https://www.bookdifferent.com/en/>

⁵⁶ Much Better Adventure at: <https://www.muchbetteradventures.com/>



5 EXAMPLES FROM THE REGION

This section presents good practices from the Member States that fit the wellbeing tourism definition, divided into four groups – destinations, thermal spas that prevail in the region, retreats that are smaller facilities fitting the wellbeing concept and the experiences designed with the individual wellbeing in mind.

Destination

The success of the wellbeing product depends on the profile of a destination. This section presents those that the European Commission awarded the title of European Destination of Excellence (EDEN) in 2019 on the theme of health and wellbeing tourism. The awarded destinations have successfully implemented a tourism offer that provides wellness tourism based on the destination's natural or cultural, historical and spiritual resources. These include, but are not limited to, water and sweat bath treatments and facilities, manual and manipulative body therapies, herbal medicine and natural remedies, healthy diet and nutrition, exercise and fitness, mind and body interventions, meditation and relaxation techniques and educational activities, etc. In addition, each destination needed to be aspirational and off the beaten track, offer authentic experiences embedded in all activities, and have sustainable management, with an organisation responsible for managing the destination, as well as agencies, NGOs and other authorities able to apply sustainable tourism practises.

VALDICHIANA SENESE – THE LAND OF WELLBEING⁵⁷

Location: Tuscany, Italy
<http://www.valdichianaliving.it/en/>

The thermal waters, the quality of food and wine, and the unique landscapes that reflect the balance between people and nature make the Valdichiana Senese a 'land of wellbeing'.

The spas represent the most tangible aspect of the concept of wellbeing in the Sienese Valdichiana. The thermal waters of this area have always been used to treat numerous illnesses, especially those of the respiratory and digestive tracts. Today, its health properties are used for beauty treatments and relaxing experiences in splendid thermal pools. Each of the three central thermal baths in Siena Valdichiana, located in Montepulciano, Chianciano and San Casciano dei Bagni, offers modern and professional services for the whole family in a unique scenic setting.

KURŠUMLIJA⁵⁸

Location: south Serbia
<https://tokursumlija.rs/en/>

Kuršumlija is a small municipality with a preserved natural oasis, meadows, hills and volcanic geysers, and warm springs with healing mineral water. Kuršumlija, with its three rivers (Toplica, Banjska and Kosanica), three spas (Prolom, Lukovska and Kuršumlijska), and a unique geomorphological phenomenon (Devil's Town), is a great place to escape the city and relax in nature.

⁵⁷ https://single-market-economy.ec.europa.eu/sectors/tourism/eden/previous-editions/eden-destinations/italy_en

⁵⁸ https://single-market-economy.ec.europa.eu/sectors/tourism/eden/previous-editions/eden-destinations/serbia_en

This destination is exceptional in health and wellness tourism for many reasons: natural healing factors in Lukovska Banya (water, mud, gas and climate) and in the spa town of Prolom (water, mud, climate), modern wellness centres, beneficial health trails, modern treatments (on weekends and holidays), round-the-clock medical supervision, professional staff. Unspoilt nature, clean mountain air, far from the big city centres, authentic health trails, the hospitality of the locals, friendly people and treatments based on healing factors are just some of the reasons to visit.

SVETI MARTIN NA MURI⁵⁹

Location: North Croatia

<https://visit.svetimartin.hr/>

Sveti Martin na Muri is one of the most attractive tourist destinations on the Croatian mainland. The preserved natural beauty and cultural heritage of the place, the preservation of traditions, and the promotion and management of the local tourism products based on sustainable development are strategic directions of its tourism development.

The thermal mineral springs, discovered over a hundred years ago, have an exceptionally high mineral content and contain carbon dioxide. According to analyses, the waters of Terme Sveti Martin are more than 43,000 years old and are among Europe's highest quality and most healing waters. The resort offers more than 20 different massage and sauna treatments (including Finnish and Roman), while the total area of the most modern wellness oasis on the Croatian mainland is 1800 m².

PODČETRTEK⁶⁰

Location: Slovenia

<https://www.visitpodcetrtek.com/en>

Olimia Thermal Baths realised long ago that they were the main driving force behind the destination's holiday offering and health and wellbeing philosophy. The area includes three municipalities and offers exceptional experiences in the unspoilt nature of Kozjansko and the Obsotelje Biosphere Reserve that contribute to wellbeing. Podčetrtek promotes sustainable and environmentally friendly agriculture, ensures that the food is of the best quality, and complements the diet and detoxification cure programmes.

The Podčetrtek is an ideal destination for those seeking an active and healthy holiday, personal satisfaction, and inner peace. The products, services and activities are based on nature and culture, including locally produced goods and services. The offer is of high quality and provided by professionals, based on local tradition and with a family touch.

⁵⁹ https://single-market-economy.ec.europa.eu/sectors/tourism/eden/previous-editions/eden-destinations/croatia_en

⁶⁰ https://single-market-economy.ec.europa.eu/sectors/tourism/eden/previous-editions/eden-destinations/slovenia_en

Thermal spas/wellness

There are numerous thermal spas in the Adriatic-Ionian region, ranging from those that focus on medically supervised procedures to heal and improve health, to wellness services, to those that follow a recreational concept for families. Two resorts are singled out here; one in Greece, which exemplifies the incorporation of scientific components into treatments, and the other in Italy, which stands out for its adoption of a biophilic design, a design that integrates nature.

EUPHORIA RETREAT

Location: near Kalamata, Peloponnese, Greece

<https://www.euphoriaretreat.com/>

The retreat, set in a pine forest, consists of three buildings designed in harmony with the surroundings and has 45 rooms with earthy colours and a Zen atmosphere. The retreat has won several awards: the Gold Greek Hotel of the Year 2022 in the Wellness category and Silver in the Spa category. It also won the Falstaff Hotel Guide's Best of Greece 2022 award and Tripadvisor's 2022 Traveller's Choice Award. The physical design, wellness programmes, holistic approach and nutrition are excellent examples of how the three core elements of the retreat presented earlier are combined into a successful concept of holistic wellbeing.

It is promoted as a luxurious and unique wellbeing experience that provides a passage on the individual transformation journey by offering a perfect environment for meaningful life change. The slogan is: Your Life. Your Journey.

Behind the idea is lifestyle entrepreneur Marina Efraimoglou, an overachiever whose cancer diagnosis inspired her to re-evaluate her life. Thus the vision of this holistic wellness destination was born.

The wellness programme combines modern medicine with Chinese, Taoist and Greco-Hellenic healing practices. A sophisticated 3GL diagnostic is the starting point of the programme. It measures metabolic health using glutathione levels in a blood sample. The results are used to develop wellness and nutrition programmes to improve metabolism, which is out of balance due to ageing, diet, stress and toxins

Euphoria offers many different types of wellness programmes, including:

- Wellbeing detox
- Weekend escape
- Advanced weight loss
- Relaxation and de-stressing
- Emotional and physical transformation
- Revitalisation
- Yoga

The retreat has a well-equipped gym and yoga studios. Three fitness classes are offered daily, but guests are also encouraged to relax outdoors. To this end, regular walks are organised, linking natural and historical sites. Meals are served in the Gaia restaurant, where nutritionists and chefs work together seasonally to

create a nutritious and tasty menu inspired by Greek and Mediterranean cuisine. Ingredients are organic and locally sourced. There is an excellent vegan and vegetarian menu that is rich in antioxidants. The restaurant has tables for two in the back and long tables in the middle to encourage communal dining for solo travellers.

LEFAY RESORT AND SPA

Location: Pinzolo, Italy

<https://dolomiti.lefayresorts.com/en>

Located in the Dolomites, in the ski resort of Madonna di Campiglio, it is an excellent example of a luxury resort developed according to biophilic design principles. Since opening in 2019, the resort has received more than thirty awards, including World Travel Awards: Italy's Leading Luxury Resort", International Travel Awards "Best 5-Star Luxury Resort in Europe "2021 Forbes Travel Guide 2022 Star Award Winner.

The resort's architecture is inspired by local construction methods and materials, while advanced technologies reduce energy and water consumption and promote renewable green energy.

The resort's architecture is fully integrated into its surroundings. Building materials include local oak and chestnut wood, local stone and natural fabrics used throughout the interior. The 88 rooms have large windows that connect the indoor and outdoor spaces.

The five thousand square metre spa combines Eastern and Western principles to restore inner balance and is one of the largest wellness centres in the Alps. The Lefay method SPA's wellness programme was developed by a scientific committee and offers phytotherapy and customised massages with its products. Consultations are provided by trained staff in western medicine, massage, physiotherapy and osteopathy.

The food is seasonal and based on high-quality, fresh products based on five principles: Mediterranean diet, seasonality, Italian spirit, ethics and preference for local suppliers.

Retreats

With the increasing demand for wellbeing, many smaller establishments are set up as places of rest, recuperation and relaxation, built and operated according to sustainability principles, offering various retreats throughout the year. Here are a few examples from the region.

AŠUMA RETREAT – THE SPACE OF VITALITY

Location: Lovćen National Park, Montenegro

<https://ashuma.me/>

It is advertised as a luxurious mountain retreat in the tranquil valley of Lovcen National Park near Cetinje, Montenegro, on a 10-hectare plot 1000 metres above sea level.

Its mission is to provide "a unique natural space for holding retreats and seminars in a cherished environment with those who long for a deeper awakening to this life through various physical, mental and spiritual practices."

It is a place where leaders of various practices can hold their seminars and workshops, benefiting from the tranquilly and healing properties of the environment.

By creating a space for retreats and seminars that reflects current trends and is similar to the Euphoria Retreat, it aims to be a place to disconnect from everyday life, reconnect with the inner self and foster personal transformation.

Surrounded by a dense forest, 'šuma' in the local language, from which the name is derived, has room for 26 people. Accommodation is in eleven eco-friendly luxury lodgings, whose facilities include a hall for activities, dining and lounge areas. The food is organic vegan/vegetarian, and hiking and wellness walks are also available. It is open from May to October.

HOTEL KORINJAK

Location: Veli Iž, Croatia

<https://korinjak.com/>

Located on the island of Iž in Central Dalmatia, Croatia, the hotel is an example of a summer resort with a simple infrastructure, excellent market positioning and reputation, and loyal guests from Croatia and Central Europe.

The hotel dates back to the 1970s when it was built as a workers' hotel in the spirit of social tourism of the former Yugoslavia. When privatised, renovated and reopened in 2000, it was at the forefront of wellbeing tourism in Croatia. It was opened with the aim and vision of combining mental and physical recreation into a unique and original whole.

It specialises in holistic, individual and group programmes for holistic self-development. It is advertised as a magical place with powerful energy to contribute not only to individual and collective consciousness. Its understanding that the health of the individual and the Earth are interdependent is reflected in its vision of a "magical place of raising collective and individual consciousness for the benefit of the earth and humanity for a reason".

Its infrastructure is simple. Accommodation is offered in 48 double and 29 single rooms with private bathrooms. The furnishings are functional but not fancy. There is also a campsite with 40 tents for those who want to be close to nature. Guests gather in a spacious lobby, a large hall and several covered terraces used for various programmes, while meals are served on a large, shaded terrace with beautiful views. There is a pyramid as an energy point for meditation and socialising.

The hotel provides:

- hiking and yoga to the island peak to greet the Sun
- morning yoga in the pine forest by the beach
- sound (gong) baths twice per day
- orgone chamber, where a strong vibrational field is created that heals and restores the body's cells and directly affects the immune system and mood, energy, and mental and spiritual balance
- oxygen therapy nourishes the brain and muscles and improves the work of the heart, also clears the mind, detoxifies the body and fills it with energy, especially beneficial for people who have cancer, chronic diseases and people recovering from surgery and chemotherapy.

- ozone therapy stimulates the production of red blood cells, which enables a high concentration of oxygen in the blood for a long time after the treatment
- evening programs foster socialisation with guests, often showcasing their unique talents or skills.

The diet is vegan/vegetarian (without meat, fish and eggs) and is prepared daily on a Mediterranean basis with fresh ingredients. This balanced diet consists of cereals, pasta, nuts, lots of seasonal vegetables and fruit, and medicinal herbs harvested on the island. However, the hotel is only a short walk from the village, with cafés and restaurants for those who prefer a different diet.

The hotel attracts many trainers and invites them to host various programmes. These include, for example, karmic diagnosis, intelligence management, Veda knowledge for health, success, wealth and happiness, getting out of the karmic cycle, thyroid health, and five-rhythm dance for harmony. The workshops and seminars change yearly, depending on the instructors and interests.

SKYROS HOLISTIC HOLIDAYS

Location: Skyros Island, Greece

<https://www.skyros.com/>

This holistic village is based on the idea of creating a community of people who want to explore their creative potential and meet like-minded people through adventure, activities and fun.

The first centre opened in 1979 on the island of Skyros in Greece. The island is one of the four inhabited islands of the Sporades archipelago in the north-western Aegean Sea. In addition, another centre was established on the island in the bay of Atsitsa. Over the years, the centre has been featured in the travel sections of all the major newspapers and trade magazines such as The Guardian, The Telegraph, Sunday Times and the like, attracting a steady stream of participants, mostly between 30 and 50 years old, of whom about thirty per cent are repeaters and travel alone.

At the time, it was the first centre in Europe to combine personal development and community building. In addition to the many physical activities enriched by the beautiful nature, over 250 courses are organised each year, including yoga, dance, psychotherapy, mosaic, outdoor adventure, art, massage and numerous forms of bodywork, writing, music, spirituality and theatre.

Skyros reflects well the inner and outer dimensions of a philosophy of wellbeing. It is committed to an environmentally friendly, ethical society and welcomes creative ideas submitted by staff, suppliers and course participants. Its holistic approach emphasises being rather than having, doing rather than consuming, and collaborating rather than competing. The goal is to create a world that inspires change that benefits both the individual and the world.

Experiences

Many tour operators organise a variety of wellbeing experiences in the Member States. Unlike the examples above, they put together a programme and then choose a destination and venue. While the above examples might inspire those who want to set up facilities in the spirit of wellbeing, below are those that might encourage facility owners and destination managers to create wellbeing programs and reach the wellbeing market.

My Yogic Adventure

<http://www.myyogicadventure.com/>

This is a company that specialises in organising yoga and meditation retreats around the world. The locations are chosen according to the natural environment and away from the popular tourist centres. They aim to provide participants with experiences that contribute to their lasting wellbeing. This is done through activities such as hiking, cruises, visiting historic sites, exploring the countryside and learning local handicrafts. The company announced several retreats in Montenegro, Bosnia and Herzegovina, Macedonia, Serbia, Turkey and Nepal in 2013.

Some retreats announced in 2023 in the Member States are:

- **Yoga and Meditation under the olive trees in Stari Bari, Montenegro**
Two weekly retreats are planned in May and September. Accommodation is in an old mill converted into a hostel, with a maximum capacity of 15 guests. Meals are vegetarian and prepared from local ingredients. The retreat programme focuses on hatha yoga to better understand and appreciate the body, including asana (postures), pranayama (breathing) and meditation. In between, participants can go kayaking, swimming, bird watching and visit some of the historic monasteries.
- **Magic Mountain Yoga and Meditation Retreat in Tara National Park, Serbia**
This retreat is planned for July and the end of August. It is set in a high-altitude mountain lodge 30 km away from a populated area; the source of wellbeing is to be found in nature, away from any distractions and pollution. Workshops with yoga, breathing and meditation take place in the mornings and evenings. Days are dedicated to hiking, kayaking or swimming. The food is natural, local and vegetarian.
- **A moment of stillness Yoga and Meditation Retreat on Ohrid lake, Macedonia**
Lake Ohrid is a UNESCO-protected World Heritage Site. In the old town of Ohrid, on its shores, there is a retreat in a house with comfortable rooms, a large garden, a yoga room and a plunge pool. The retreat's theme - silence - is based on the time of the summer solstice. The yoga and meditation workshops are combined with hikes, sightseeing and water activities (boating, swimming, sailing, kayaking).

RUN WILD RETREATS

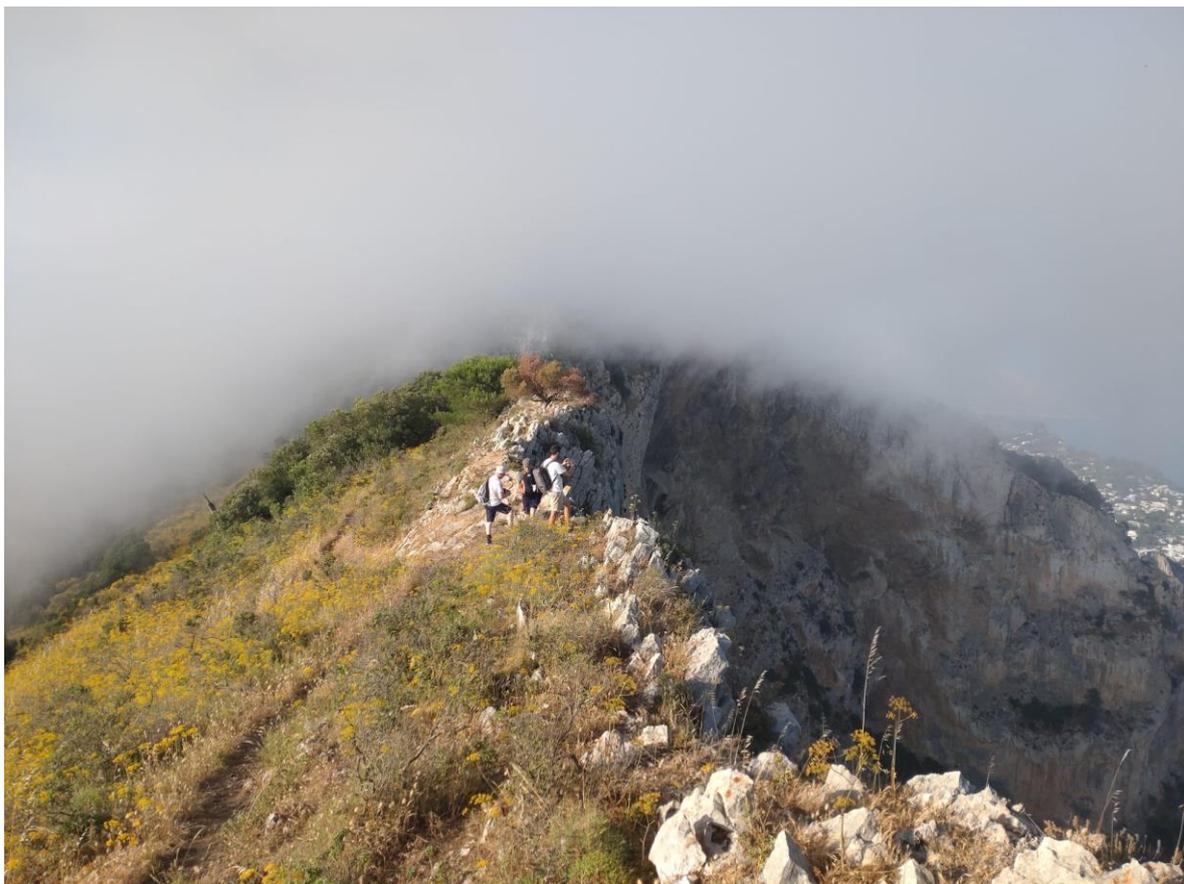
<https://runwildretreats.com>

It is a tour operator specialising in travel packages for runners in small groups, with the aim of helping runners to reduce their stress and improve their energy and vitality. It is a Colorado-based company that attracts participants from North America and Europe. It organises running retreats in the United States, Canada, Asia (Buthan) and in Europe in Spain, Ireland, Italy and Iceland. The main features of all retreats are getting to know the local culture, cuisine, and guides. By using healthy running techniques to promote self-compassion, conscious training, self-confidence and self-care, participants gain new motivation and passion for running and tools and methods to prioritise their wellbeing and self-care (without guilt). As a member of the Transformational Travel Council, each participant gets their Transformational Travel Kit, featuring the book, "Transformational Travel Journal: Your guide to creating a life-changing journey" by Eric Rupp.

A retreat announced in 2023 in the Member States is:

- **ITALIAN DOLOMITES TRAIL RUNNING RETREAT**

The seven-day retreat in July is for advanced runners in South Tyrol. The theme is running with purpose, which is about overcoming fatigue or apathy. It is intended for experienced runners. Accommodation is in various hotels, each with spas, private relaxation areas, massages, steam baths, infrared saunas, indoor or outdoor pools and whirlpools. The programme includes a Natural Running Form Clinic, a Trail Running Technique Clinic, mindful breathing exercises, a wellness workshop and a mixed trail running workshop.



6 RECOMMENDATIONS AND IMPLICATIONS

The Adriatic-Ionian region has a long tradition of health and wellness tourism based on thermal and mineral waters and the healing properties of the sea. The Mediterranean lifestyle combined with healthy food is known worldwide and inspires many wellness practices worldwide.

The importance of wellness is highlighted in the strategic tourism plans of all Member States, with some such as Italy and Slovenia leading the way in terms of the number and quality of wellness offerings and other Member States seeking to bring existing products up to current standards.

Wellbeing is understood in the Member States as an outcome of health and wellness tourism and not as a product in its own right. Indeed, the boundaries between wellness and wellbeing are blurred as both concepts are defined by a holistic health philosophy (mind, body, spirit) and the application of sustainability principles for economic, community and environmental wellbeing.

Nevertheless, wellbeing tourism as a concept is helpful in drawing the attention of policymakers, destination managers and existing or potential entrepreneurs to a whole range of new and innovative products already offered in the region. However, wellbeing products are not necessarily perceived as part of the destination tourism system, and their development potential may be overlooked.

What is certain is that individuals and communities are in a permanent state of anxiety and that the need to look after one's wellbeing, as well as the wellbeing of communities and the health of the planet, is and will remain a permanent feature of contemporary society. This affects both the demand and supply of wellbeing tourism. The number of people seeking to regain, improve or maintain their spiritual, mental and physical health is steadily increasing. Part of this need is satisfied by travelling to destinations that offer rest, relaxation and activities specifically created to promote individual wellbeing.

The same forces that drive demand for wellbeing tourism are also at play among its tourism providers. Retreat centres, eco-farms with tourist accommodation, creative workshops, activities specifically designed to interact with locals, volunteering, healing trails, and alternative and complementary therapies - all are offered by people who fall into the category of lifestyle entrepreneurs. When people are tired from their stressful jobs, have a work-life imbalance, or are faced with significant life changes (health crisis, divorce, loss of family members), they often turn their energy to activities that promote their well-being and that of others. The income from visitors is often their primary source of income. In this way, they become tourism entrepreneurs. The catch is that they associate tourism with all its negative manifestations and do not want to belong to it. Therefore, they are often invisible as local tourism actors and destination managers. Wellbeing tourism is a mechanism to pool such resources, facilitate their identification and attract similar providers to create a well-being tourism destination through a critical mass of services.

It is safe to say that the Member States have providers that already meet a notion of wellbeing tourism beyond those already established wellness and spa centres and resorts. As some examples illustrate, the region is a destination for many wellbeing travel organisers. Their outside-of-the-mass tourism flow destinations are hosts to a variety of retreats and programmes. It is also probably safe to say that many providers of alternative and complementary therapies in the Member States are organising programs and retreats for their own customer base. However, many programs are

organised by foreign travel organisers, capitalising on the natural beauty and serenity, with quality facilities and great hospitality, for many yet-to-be-discovered parts of the world.

The wellbeing tourism perspective provides opportunities for many small, eco, sustainable accommodation facilities that meet the basic criteria (sufficient capacity for small groups, space for workshops, well-equipped kitchen, vegetarian/vegan locally sourced ingredients in quiet places with opportunities for activities in nature and historical sights) to promote themselves to this market. Furthermore, it presents excellent development opportunities for destinations, especially those outside the main tourism centres and main transit routes, to attract wellbeing entrepreneurs that would drive tourism demand and improve the wellbeing of the local population. The local people would also greatly benefit from such development since the Member States, apart from Italy, score low on the population wellbeing index.

Equally important, the development of wellbeing tourism gives many destinations in the Member States a head start. Indeed, most tourism strategies try to catch up by improving existing products and offering those in demand. By the time they have brought these products up to date, they are already facing intense competition, and trends have already changed. Investing in wellbeing tourism is a long-term strategy that is at the forefront of tourism development.

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