

Wellness Tourism From Consumers' Perspective: An Exploratory Analysis

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Abstract: This paper summarizes the perspectives of health and wellness tourism consumers, to better understand the factors that influence this tourism product. A quantitative approach was adopted to collect primary data through the application of an online survey to effective and potential health and wellness tourism consumers between January and April 2021. Results show that growing number of consumers tend to value health and wellness tourism as a holistic experience, in which not only products specifically related to health and wellness treatments are of particular importance, but also activities related to leisure, recreation and culture. This paper provides a basis of research and analysis for global wellness and tourism industry stakeholders. The aim is to help the industry understand consumer behaviour and preferences in the traveller's process of choosing a destination for a wellness vacation. This is achieved by predicting wellness tourism trends and developments, by acknowledging the gaps in the research available for understanding wellness tourism and reflecting the experience economy perspective in the sector.

Keywords: health tourism, wellness tourism, consumers, trends, development

1. Introduction

Over the years, the tourism industry has witnessed a significant growth in wellness tourism (Yeung & Johnston, 2016) and it continues to grow annually regardless of the current negative global economy (Kazakov & Oyner, 2020; Pyke *et al.*, 2016). From 2015 to 2017, wellness tourism grew at a rate of 6.5% annually, over double the growth of tourism overall which is at 3.2%, and it is predicted to grow to US\$919 billion by 2022 (Global Wellness Institute, 2018). It is expected to be worth around US\$ 1.10 trillion by 2028, according to a new report by Vision Research Reports (*Wellness Tourism Market Size, Share, Trends, Growth, Production, Consumption, Revenue, Company Analysis and Forecast 2021–2028*, 2021). Therefore to utilise and maximise the potential of wellness tourism for stakeholders, it is important to evaluate consumer behaviour and the preferences that travellers have when they are selecting a destination for wellness. The purpose of this paper is to explore these motives by identifying the wellness tourism trends, and what pushes the consumer to choose. Although this contemporary growth of wellness tourism is not a new phenomenon and has been prevalent since ancient times (Smith & Puczkó, 2014; Steward, 2012; Walton, 2012) these preferences are regularly changing and stakeholders must be continuously watching patterns in order not to be left behind. It is noted that the consumer's attraction towards wellness tourism services is oriented to the luxury of the experience, rather than the attraction to the authenticity of a specific historical and geographical characteristic of a place (Chen *et al.*, 2008; Huijbens, 2011). It is important to stress that according to Global Wellness Institute (GWI), wellness travellers are categorized into two groups: primary wellness travellers, who are motivated to travel for wellness services and choose their destination based on its wellness offerings; and secondary wellness travellers, who intend to partake in wellness activities during any kind of travel (such as going to the gym or getting a massage during a business trip). The bulk of wellness tourism is done by secondary wellness travellers, who account for 89% of wellness tourism trips and 86% of expenditures in 2017. Secondary wellness tourism also continues to grow at a faster rate than primary wellness tourism, at 10% compared to 8% annually, from 2015-2017 (GWI, 2018). The fastest-growing segment is expected to be wellness activities over the forecast period of 2021 to 2028 as consumers are increasingly opting to spend more on health and wellness.

The birth of wellness intertwined with tourism has created a new approach to the multidimensional concept of wellness and health (Medina-Munoz & Medina Munoz, 2013) and the conceptual paradigm is evaluated and reformed from a traditional view of health (Kamassi *et al.*, 2020) to a holistic wellness orientation (Kazakov & Oyner, 2020; Dillette *et al.*, 2020). It is agreed by multiple researchers that tourist experiences and transformations must include elements of both hedonistic, such as momentary pleasure and also of eudaimonic aspects, such as self-realization, personal expressiveness, growth and goals (Lee & Jeoung, 2019; Filep & Deery,

2010). Therefore, wellness tourism should strive to meet the every-changing tourists demand for hedonistic and eudemonic experience and transformational products and services (Mackenzie & Raymond, 2020).

Previous studies attempt to categorize the wellness travellers to better conceptualise and organise the development of wellness tourism by dividing into the demand and supply sides. The demand side indicated how travellers require holistic wellness itineraries that include multiple types of wellness experiences and services to be included in their trip (Kim *et al.*, 2016; Lim *et al.*, 2015). Studies identify the various categories with focus on destination characteristics (Voigt & Pforr, 2017) and tourism businesses (Thal & Hudson, 2019) or on push and pull factors that drive tourists by observing the relationship between reasons for travel and income and the relationship between gender and education level (Damijanić, 2020). Other studies look at why tourists first choose a destination and their motivations for returning to the same destination and identified as local flora and fauna as well as popular local attractions (Lim *et al.*, 2015). Wellness tourism, however, can only be defined by a wide-angle view and considered by its multidimensional nature (Kazakov & Oyner, 2020; Huang *et al.*, 2019; Damijanic, 2019; Gao *et al.*, 2017). In our paper we recognize that wellness tourism merges global trends with the travelers need of health, cultural, spiritual, nutritional, athletic and environmental experiences (Angus & Westbrook, 2020).

Wellness activities include Ayurveda treatments, mindfulness training, spa treatments, yoga, meditation, agricultural tourism, etc. Several other popular activities include shopping, dining, and sightseeing (Wellness Tourism Market Size, Share, Trends, Growth, Production, Consumption, Revenue, Company Analysis and Forecast 2021-2028, 2021). Wellness tourism, the new trend in healthcare has new renewed traveller interest in services reflected in spas and such as thermal water and other health practices such as physical activities and healthy food, indicating tourists' tendency to opt for proactive care to enhance and maintain well-being (Bodeker & Cohen, 2010). People who travel for the purpose of wellness tend to be high-yield tourists and spend 53% more than the typical international tourist and domestic wellness tourists spend 178% more than any typical domestic tourist (GWI, 2018).

Research conducted by Luo *et al.* (2017) showed that wellness tourism activities can have very positive impacts on individual's quality of life, "and can result in improvements in dealing with problems at work, promoting family harmony, and engaging in social life." (Luo *et al.*, 2017). This assumption emphasizes the importance of wellness tourism in the current society. The industries fluid nature provides businesses, an opportunity to merge wellness with their activities to

benefit from the increasing numbers of both domestic and international tourists. Businesses such as art and culture (Clift, 2020). The number of countries marketing their wellness credentials has soared, rising from 65 in 2013 to more than 100 in 2018 (GWI, 2018). As indicated over the years, tourism in general is steadily orienting more and more towards wellness (Kazakov & Oyner, 2020; Stara & Peterson, 2017)

While we recognize that wellness tourism is growing, it is also apparent that spa visitors' expectations have become more complex and profound (Guo *et al.*, 2015). Travelers seeking well-being are not satisfied merely by rest and use of passive wellness services. Wellness tourism is an active form of tourism (Smith & Puczkó, 2016) in which the wellness seekers are actively exploring different services and creating their own personalized wellness experience (Andersson, 2007; Prebensen *et al.*, 2013). Stakeholders grasp this added value that can benefit their business and client therefore wellness related businesses not only provide wellness services but also provide platforms where people can learn skills on improving their well-being (Koskinen *et al.*, 2017). Spas and recreational facilities have a strategic advantage of recent scientific research that accounts for therapeutic natural factors and can use this to develop their businesses and provide the travellers with well-informed services (Munteanu *et al.*, 2013).

Travellers, and specifically wellness tourists, are increasingly travel conscious and aware of the impact tourism has on communities leading to a shift from "consuming" to "contributing", a tourism trend that has evaluated how operators and stakeholders package their services. The tourist's increasing desire for more emotional experiences and more permanent transformations and lifestyle changes are causing the influx in wellness tourism. A survey by InterContinental Hotel Groups (IHG) indicates that 69% of travellers (aged 18 to 24) and 48% of 55s and over want to be more environmentally and socially travel conscious. They also suggested that they are willing to spend on average 31% more on accommodation which they know operates responsibly, 51% said they are willing to pay 20% extra per night for responsible accommodation. 46% say they are likely to be

conscious of tourist activities that have a negative impact on the local environment and communities since the global pandemic (Journey to tomorrow, 2021).

Gender differences are also worthy of analysis when it comes to wellness tourism. Majority of rejuvenation related service are women (Cain *et al.*, 2015) and in general, more spa visitors tend to be women than men (Crowley & Linehan, 2016; Smith & Puczkó, 2008)

2. Methodology

This paper summarizes a more comprehensive work conducted by Hekmat et al. (2022) aiming to explore the dimensionality of wellness attitudes when examining the reason consumers choose a particular place and activities for their wellness travel. In the discussions of the theory section, it is expected to find signs of current wellness mentality and consumption trends in people's wellness attitudes. Based on those discussions, also it is assumed that people not only expect relaxation and rejuvenation when visiting a wellness destination, but that they are also increasingly interested in activities and services that achieve more holistic health benefits and an experiential dimension in consumption as well as activities that may not be directly linked to wellness but that the traveller would like to include while they are on their wellness trip, such as walking tours, climbing/hiking and esoteric dancing among others.

The purpose of this section is to present the methodology implemented for this study, namely research strategy and methods, population identification and sample selection technique. Also, the research design, goals of the survey questionnaire and statistical software used to data treatment are described.

2.1 Data collection and analysis

A quantitative research strategy was adopted for collecting primary data through the questionnaire survey as a reliable method to collect information from multiple respondents in an efficient and timely manner. It is especially important in this project due to the restrictions of the Covid-19 pandemic, which has made most interactions online. The data collection process was conducted from January until April 2021. The questionnaire was posted on selected travel Facebook groups in which participants had experience and desire to travel, as well as on WhatsApp and Telegram group, obtaining 161 valid responses.

The target population of the empirical study corresponds to all the visitors who had or have a particular interest in wellness tourism. For the study, two specific criteria were applied to select the sample out of total population: i) they had to be over the age of 18; ii) must have had travelled for wellness or have a particular interest in travelling for wellness after 2020. A convenience sampling approach was applied to select the individuals to participate in the survey questionnaire due to its accessibility and simplicity in reaching the population. The objective of the mentioned approach was to reach out to as diverse a sample as possible, in terms of different nationalities, both people living in their home countries and expats, people from diverse walks of life in terms of financial situations and reasons for wellness travel.

The questionnaire started with the explanation of the meaning of wellness tourism based on Global Wellness Institute definition and individuals were requested to confirm whether they had an interest in travelling for wellness in post-Covid-19 period. A positive answer to the previous question allowed them to continue with the next questions. The first section aimed to capture information related to the sociodemographic characteristic of the sample, following by specific questions such as geographic preferences for wellness vacation, visitor's specific preferences and expectations of wellness tourism, the experiences looking to enhance the wellness vacation, some aspects related to accommodation, safety, and cleanness among essential factors. The mentioned dimensions were included in the survey questionnaire based on the analysis of previous research and studies in the domain. For data analysis, SPSS statistical software (25.0 version) was applied, and the results are discussed following the set-up objectives in the beginning of the study.

Frequency analysis was executed for the variables describing sample profile and trip characteristics. Concerning the bivariate analyses, Chi-Square test of independence was used to test the association between willingness to travel in post-Covid-19 period and main goals for wellness vacation, place preferences, as developed in previous studies (Meikassandra *et al.*, 2020).

3. Analysis and discussion of results

3.1 Sample profile

The sample encompasses 36 countries, allowing the understanding of what wellness tourists expect from their wellness trip irrespective of their country of residence. As the objective was to get an understanding of what wellness tourists expect from their wellness trip, irrespective of their country.

The respondents were mostly aged between 35 and 44 (36%) and 25-34 (24%). Regarding gender, the females are represented by 58% of the respondents and the males by 42%. Most of them were employees, shortly followed by self-employed. The monthly income of 44% of respondents were between \$1,001-\$5,000, significantly higher than the 15% of respondents with the second-highest monthly earnings of \$5,000-\$10,000.

Regarding the dream destinations of respondents by region, it is possible to observe that travel for wellness is on the incline in developing markets, mainly Asia (61%), followed by Europe (25%). Detailed analysis in this study demonstrates that Indonesia, specifically Bali as respondents mainly noted, as the most desired location for travel for wellness, closely surpassing Maldives. Some studies also point out that Bali become one of the popular destinations in Asia for a wellness tourism destination in 2017-2018 (Meikassandra *et al.*, 2020). Americas, Africa, Australia/Oceania were also selected as a dream destination by some respondents, indicating potential and interest for a wellness vacation in these regions.

3.2 Characteristics of the wellness trip

A descriptive statistics analysis was used to characterize the planning of a wellness vacation by potential visitors. The potential wellness visitors were questions about preference for geographical location when choosing the wellness vacation. A linear scale was used to understand their preferences (1 being the preference to be close to home and 5 was the willingness to travel far and wide from home). Based on the results, the average value is 4, which indicates that the respondents are willing to travel far from their home country for their wellness trip. 75% of the respondents want to plan their itinerary rather than have a professional travel agent plan their daily activities. This is surprising since often travel is associated with rest and non-decision making, going with the flow and switch-off mindset, but people would like to be part of the planning and know what is, how is and where is of their travel itinerary. Another perspective on these results can be related to the fact travel agencies are not offering competitive and commoditized packages regarding wellness vacations.

Regarding the place preferences, 76% of the respondents prefer to be in a secluded place to relax with the least amount of people. Not surprisingly, during a pandemic, many respondents prefer to avoid crowded places and less favourable locations for the spread of the virus. While only 24% of the respondents chose to be in a group setting or where there is more interaction with other people.

Socializing, meeting new people and active interaction with others was one of the motivations in tourism (Wolf-Watz, 2014). Nevertheless, the consequences of the Covid-19 pandemic crisis have drastically changed this behavioural pattern, resulting in tourists valuing secluded and less crowded places. Earlier studies mention that escapism has been the highest purpose of travel, the notion to get away and switch-off has often been the main purpose of tourism (Cohen, 1996; Rojek, 1993),

As for preferred company, wellness tourism consumers prefer to travel on a wellness vacation with their partner (36%), followed by family (22%), friends (22%) or alone (20%). Besides the respondents choosing secluded places, they prefer to travel with company, the choice of which may depend on various factors. In this context, So and Lehto (2007) explored the travel group segmentation, namely, traveling with family, travelling alone, and travelling with friends among Japanese travellers. The research findings demonstrate that motivations and travel preferences vary among the groups, as well as their participation in different activities. Those who travel alone and with friends tend to be more engaged in activities and socialising with others, while those who travel with family tend to value physical relaxation and active experiential learning.

Also, we aimed to understand the preferred experiences of the travellers. Questions were made about their main objective when going on a wellness vacation, about which activities they believed would help them to achieve their wellness goal, and which wellness activities were most appealing and enjoyable that they would

like to include during their trip, and lastly, which activities they would like to include in their trip even if it were not wellness related. As it can be noted, the most popular reasons for wellness travel are to rejuvenate and unwind (72%), following by the goal of mental health (56%), to escape routine (44%) and to work on fitness (27%). When asked how they can enhance their wellness goal, rest and rejuvenation was significantly more popular than the other options. Healthy eating, nutrition and weight loss was the second most popular choice considered by travellers to help them achieve their wellness goal. Yoga and holistic treatments shortly follow and then below 40% and over 20% of the respondents feel that personal care, beauty, anti-ageing, retreats, shamanic rituals, or fitness boot camps can aid their goal. Only 9% feel that medical treatments can help them reach their goal, and 8% feel transition therapy would help.

When it comes to wellness activities that visitors would like to add to their itinerary, most respondents preferred walking tours (65%), massages (62%) and spa experiences (61%), thermal/mineral springs (50%), climbing/hiking (48%), facial treatments (27%), new wellness technologies (21%), art therapy (19%), esoteric dancing (19%), vitamin IV drip (14%) and one respondent added their option stating life coaching as an activity.

To deepen into the interests of the travellers during their wellness trip, they were asked which additional activities they would like to be included even if it was not wellness related. Most respondents wanted nature to be included in their trip (81%). Cultural activities were next with 64% and adventure came in at third place with 62%. Rest had 57% and sports had 31%. While 21% of visitors also wanted to visit places, they had seen previously on TV, and 19% of them would include a visit to friends and family during their wellness trip. 17% choose to add "Instagrammable" places into their itinerary and only 1% wanted to visit religious sites and less than 1% chose temple tours.

Further, the potential travellers were questioned about accommodation preferences when going on a wellness trip and what factors influence their decisions when choosing accommodation. The findings illustrate that 53% would opt for luxury hotel while 40% would go for boutique hotels, 28% would choose guest houses, 20% would go camping and 19% would choose an economy hotel. Regarding accommodation, it is possible to conclude that cleanliness, safety, and comfort are considered the most important factors for accommodation selection.

4. Conclusions

The paper explored the attitudes of wellness travellers to further add to the existing knowledge of the attitudinal dimensions influencing wellness consumption by tourists seeking proactive care as growing attention to health and well-being issues arise. As travel becomes more accessible and consumer motives and benefits sought from travel become more diverse it is especially important to attempt to understand the factors that influence the behaviour of tourism consumers and, more specifically, wellness tourism consumers. In this way, companies and public and private institutions will have more tools to prepare themselves better to offer the most adequate tourist experience for each consumer profile. While some consumers seek products and services that make them feel younger (Pilzer, 2007), others are more focused on lifestyle (Liu *et al.*, 2018) and believe that "health" not only refers to biomedical matters, but also encompasses leisure, nature, and wellbeing (Young *et al.*, 2018). This belief crucially influences their consumption behaviour reflected in purchasing organic and nutritional food (Lo *et al.*, 2017; Regine, 2011;), participating in wellness programs (Ott-Holland *et al.*, 2019), and choosing wellness tourism (Hritz *et al.*, 2014). This changing consumer behaviour has led to the rise of the wellness economy. As individual needs are altered, so is tourism (McKercher & Chan, 2005; Trauer, 2006). Global and societal changes have resulted in the need for specific activity focused tourism (McKercher & Chan, 2005; Trauer, 2006) and wellness tourism fulfils the aim of stress management, personal development, reflection, connection and satisfying the urge to find the meaning of life (Kelly, 2010). This type of wellness tourism doesn't just imply changes in the usual tourism concerns like transport and accommodation, but the mental wellbeing of the tourists too (Kelly, 2010). As the findings of this study demonstrate that the willingness to travel for wellness vacation is strongly associated with the intention of visitors to rejuvenate and unwind, and with the objective to escape the usual routine. According to previous studies, escapism has been the highest purpose of travel, the notion to get away and switch-off has often been the main purpose of tourism (Cohen, 1996; Rojek, 1993), as well as rejuvenation and the urge of self-discovery and self-purpose (Mintel, 2007). Thus, well-being can become a type of life of self-discovery in an era of increasing stress. Our findings indicate the type of accommodation and pace travelers most prefer during a wellness trip. Stakeholders can acknowledge that majority of the sample want to add rest and relaxation to their vacation rather than high energy, dynamic activities and that wellness travel is synonymous to calmness. Consequently, well-being is generally considered to be a holistic philosophy,

supporting temporary feelings of happiness. This paper contributes to a better understanding of this niche market as it continues to evolve and to better prepare destinations and stakeholders to also be proactive in their business' well-fare by developing to the needs and motivations of wellness tourists. Stakeholders may use this information to predict wellness tourism trends and identify patterns in travellers and use this information to maximise the potential of their business activities.

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