

WELVET SURVEY ON STATUS OF
EU HEALTH AND WELLNESS TOURISM

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INTRODUCTION

Here we report the content of the desk research of the Erasmus+ WELVET project created the new job position for the Niche tourism – the “Wellness Instructor”. We realize a series of scientific publications and presentations for the New smart model on global touristic events as: World Healthy Aging Council in Istanbul, Turkey (2018); HESTOUREX in Antalya, Turkey (2019); Balkan Summit for Health, Wellness and Spa tourism in Budva, Montenegro (2019); IRIGMOYGRAD - Transborder EU cooperation, Novi Sad, Serbia.

The international scientific forums: World Water Conference (2018); Int. Congress for Applied sport science (2019) and the Journals: Trakya Journal of Science (Web of science); Research in Kinesiology (ODIJ), SportMont (Scopus) and *Scientific Journal for Smart Innovation in the Wellness Industry and Niche Tourism* (Nesheva, 2018; Polimenov, 2019).

Different aspects of the Wellness culture are subject of the scientific papers of young researchers on the Balkans (Tichinov et al., 1987; Tishinov et al., 2012; Treneva, 2013; Trendafilov et al., 2013; Valev, 2015; Varbanov et al., 2015; Nesheva, 2018; Stoycheva et al., 2019).

Our scientific interest was to disseminate the obtained results by the team of project partners (7 organizations) and analyse the finding in support of the Wellness culture level and presence of specific educational programs of training courses in Austria, Bulgaria, Great Britain, Estonia and Macedonia and intellectual products edited in 5 European languages.

METHODS

The study has been taken by 411 people (53 owners or managers of Wellness & SPA centers, scholars, Bachelor on Sport, Doctoral students and master’s

degree graduates in wellness, spa and Thalasso culture) from all WELVET partners countries, aged 17-56. There were 202 men and 209 women in the study. The median age of the participants in the study was 36,5. For the study, the targeted group we divided into age segments instead of educational classes, practical experience (less than three years, from four to seven years, and above eight years). The content of the target's groups is: CEO, manager, operational employee / therapist and non-graduates in the wellness and spa area. Each partner country was responsible for the correct application of the research methodology, conform with the EU scientific standards. All respondents were signed agreement declarations for the data of the study to be published. Within the project period 2016-2018 this desk research was conducted starting in March to June 2018. The respondents' opinions we measure with an adaptive version of the questionnaire for studying through the usage of smart tools of google drive. For accomplishing the goal of the study, we used: a test for the psychometric grade. The expectation for the content and design of the specific needs by country partner was studied. All intellectual products created by the WELVET project collaboration are focused to assist the staff at the Wellness centres in the EU Niche tourism and to work as an instrument for certification of the acquired specific professional competencies. The overall goal of the project study was to establish the existing level of Wellness culture in each partner country by defining the importance of the studied indicators and create the full certifying intellectual instruments for the new job position – “Wellness Instructor”. The specific goal of this publication is to present the non-publishing results and analysis for the actual status and advantages in Austrian Wellness culture, also the need of specialised staff for the Niche tourism.

RESULTS

The Wellness culture and the health tourism in Austria, as a new concept for a healthy lifestyle was established in the same time as in Europe around 1990 (Stiglitz et al., 2009). The field was taken up by the hotel industry and the health resorts in Austria, Switzerland and Germany (Aked et al., 2008). Health proves to be a strong holiday motive and was discovered as a potential interest and new market share. Many people want to "do something for health" when they go on holiday (Allin et al., 2012). The origin of the change in leisure activities is mainly caused by industrialisation, which led to the separation of the place of work and place of residence as well as the organisation of the day

in working time and non-working time (Bundesministerium für Wissenschaft, 2014). In the beginning, because of the massive production, non-working time was almost entirely related to sleeping and eating (Polimenov, 2016). But in the second half of the nineteenth century there was a reduction in working hours due to trade unions and the positive influence of social legislation (Cameron, 2010). Instead of leisure time only being a restoration in terms of workability, new meaningful design possibilities were created. Needs for spiritual balance, inner peace, time for oneself, and time for wellbeing and health are important in this context. This change in thinking creates a growing market in wellness and similar sectors (Hofmann et al., 2011).

Wellness is characterised by an understanding that health is improvable and as a state of complete wellbeing. The origin of the word wellness extends back to the year 1654. Sir A. Johnson used the word "wealnesse" at that time to describe the state of wellbeing or good health. In 1959 the American social medical doctor Halbert L. Dunn developed the term "wellness" from the word wellbeing and fitness; it aims at physical comfort, fun and good physical condition. In the 1970s the wellness pioneers John Travis and Donald B. Ardell developed new holistic wellness models on behalf of the US government. These aim at prevention and self-responsibility of everyone for his or her health. In doing so, the individual way of life, behavioural patterns, inner attitudes, beliefs, motives, emotions and mostly unconscious lifestyle concepts are influenced. A new idea emerged as a result: Illnesses should no longer arise by preventing them due to a conscious way of life (Kalkowski et al., 2011).

Health tourism as a sub-segment of tourism is the generic term for a touristic stay, with the aim of maintaining, stabilizing and restoring health, and a focus on health services. Regarding health, this covers different physical or psychic sub-areas, e.g. medical check-ups, beauty, losing weight, fitness and nutrition. The main motives of health tourists are "recovery and relaxation" (87%), "doing something for health and body" (74%) and "to enjoy" (60%). In principle, a health holiday is spent in summer rather than in winter. One must be cautious about the different types of holidays that are subsumed under the health aspect. Health holiday, wellness holiday, fitness holiday etc. can refer to similar, but also to differing concepts. For example, the wellness holiday entails rather experience like enjoyment, fun and pleasure, and thus pursues a different, rather holistic understanding of the concept of health, which implicates more than a state beyond illness Sachs et al., 2016). Wellness is

becoming an active health strategy, which helps the individual to make his life healthy and productive through scientifically assured measures, thus leading a satisfied life. The travel motivation of wellness tourists is characterised by "be pampered", "relaxing", "enjoying", and "refuelling" (Sachs, 2015). These holidaymakers use indoor swimming pools and wellness and beauty services. Regarding the accommodation styles, preference is given to hotels and pensions. It should be noted that other holidaymakers also specify motives that relate to health and wellness. These include, for example, hiking holidaymakers and sports and active holidaymakers. However, in these groups, the holiday motives are largely excluded from the health and wellness area (Kohl & Partner, 2009).

As mentioned above, health tourism can take various forms. In the course of a categorical distinction, the following areas can be distinguished (Nahrstedt, 2008).

The new concept for Wellness culture or applying healthy lifestyle is the focus on holistic wellbeing. Meanwhile, the concept is broadened to include relaxation, recreation and beauty. In general, the term wellness is not standardised, as there is currently a room for interpretation in the assignment. Hotels listed in this segment are usually 4* or 5* establishments, which are listed in the Relax Guide in the category "Wellness". In order to be included in the Relax Guide, specific standards have to be met, which are developed on the basis of existing businesses. The location and, of course, the wellbeing services play a decisive role.

The field of the Austrian thermal spas have not yet been defined in legal terms. There are therefore no established criteria for classifying a thermal spa. However, most of the thermal spas have at least thermal water. Thermal water has additional ingredients in comparison to normal water, which are absorbed through the skin are used to ease pain and reduce suffering (e.g. muscular tension, skin problems, cardiovascular disorders, rheumatism, diseases of the musculoskeletal system). Thermal establishments include both thermal spas and thermal hotels. Thermal hotels are those which are directly connected to a thermal spa or which are operated by the thermal spa. In Austria there are currently 41 thermal spas and 140 hotels which can be classified in the thermal segment.

The field of the Austrian alpine wellness can be defined by four pillars:

- ✓ Alpine character: proximity to nature, idyllic location, use of regional products;
- ✓ Alpine pampering: cosmetics, relaxation and culinary delights. The naturalness and purity of the products is essential;
- ✓ Alpine fitness: fitness, exercise and fitness check-ups;
- ✓ Alpine health: The forces of nature as a medical healing method.

In addition, a demanded altitude of 1.500 to 2.500 metres must be reached to offer those four pillars in full extend. These criteria restrict alpine wellness to the western regions of the country. Due to these prerequisite criteria the growth of alpine wellness is limited. In the western federal states, it is however an integral part of tourism.

The field of the Austrian Medical wellness is to be understood as an increase and deepening of wellness and pre-stage of a medically prescribed treatment. The focus is on offers regarding nutrition, relaxation, exercising, and health education. Motives to take advantage of medical wellness are therefore prevention, health promotion, healing and the increase of wellbeing. Most of the services offered in health tourism focus on the topic nutrition and fasting. Medical wellness is gaining in importance, as a result of which the development from general wellness to goal-oriented medical treatments is visible.

The field of the Austrian segment of minimally invasive, aesthetic medical tourism is characterised by preparative treatments, anti-aging and aesthetic/minimally invasive procedures. This is an area that has so far been little captured but has the potential to grow in the coming years, 55% of the summer guests and 48% of the winter guests in Austria can be assigned to the wellness segment. On average, the daily expenses are 133 €. This is about 18% higher than the average. Over half of the wellness tourists stay at for four to seven days, while only 22% of holidaymakers stay only up to three days. Austrian tourism has achieved a remarkable position in international competition. Strengthening the markets in the EU Member States and the non-European countries could further increase the growth rates of Austrian tourism (Tinkler et al., 2011). About tourism growth and employment opportunities winter sports and short vacations with wellness components offer important hopes in addition to cultural and urban tourism. However, the importance of health tourism in Austria must also be seen in the light of the fact that in comparison to other countries tourism in Austria is of great overall importance

(Ziegler, 2011). In summary, the situation is cautiously optimistic. The high demand and the stability compared to other touristic areas offer a very solid foundation for further development of the health tourism industry. A close cooperation between policy, social insurance, private health insurance, municipalities and facilities is a success factor. Mutual learning effects between healthcare and tourism could be triggered and may lead to higher value, improved customer and patient services, and sustained growth in the industry (Ziegler, 2011).

DISCUSSION

The profession of the wellness trainer or wellness instructor is characterised by the fact that there are many further names for this profession (e.g. personal wellness trainer, fitness trainer, health trainer, wellness coach). The professional title “trainer” is not regulated in Austria. Anyone can call himself/herself a trainer, no matter if he/she has a license or not. A completed education is of course recommended for own quality assurance measures. Trainers do not need a trade licence and often rely on a work contract. The fact that someone uses the professional title “trainer” does not state which professional qualification is necessary for the specific activity pursued. For the independent exercise of individual consulting and support activities in the field of personality development (e.g. “personality training”) the respective trade licence for life and social counselling will be necessary. Wellness trainers have the task to show their clients how to find a harmony of body, mind and soul. They teach their students about proper nutrition, relaxation and exercising. They perform the exercises themselves, supervise the training, initiate activities for relaxation and encourage the clients to join in leisure activities that promote physical and psychological well being. Regarding the prerequisites, there has to be stated that there is no regular organised training. In order to be able to specialise in a field, a basic training is beneficial (e.g. in sports, tourism, health, psychology) (Nahrstedt, 2008). Relevant knowledge can also be acquired through short training courses. Personal requirements for this profession are:

- Joy of working with people
- Joy of movement
- Social competence
- Contact and communication skills
- Positive and health-conscious life setting

- Physical resilience and endurance
- Didactic skills
- Organisational talent
- Responsibility

The requirements for a “good” employee, colleague and service provider are implicit notions of professionalism. A study in the German-speaking region on this topic focused on the attitude of managers, practitioners and customers in the wellness sector. Owners and managers often formulate extensive and diverse requirements for employees like the ability to interact, flexibility and team player qualities. Employees themselves concentrate on collegiality and personal qualities, while customers place the emphasis on empathy and willingness to communicate in addition to professional knowledge and personal qualities. In general, an everyday understanding of professional work, namely the understanding of the individual case and the successful interaction with the customer, can be determined. It is noticeable that especially customers interpret professionalism as manual know-how. Regarding this point, there is a divergence between customer requirements and the perception by employees. While the customers demanded manual skills, the employees interpret the technical requirements as the need for extensive knowledge acquisition and the need to keep up to date. Both aspects in principle result in a high level of further training.

CONCLUSIONS

In conclusion, based on the conducted research, the following implications can be drawn:

1. On a European level, the recreation industry and in particular the Niche tourism have a crucial need of well-trained specialized staff;
2. In Austria and on the Balkans, in order to acquire a manager position in the Niche tourism, a person needs interdisciplinary knowledge and skills combined with the application of wellness culture;
3. Austria has proven to have the potential to be a European leader in the sector of Recreation industry and Niche tourism;
4. Europe adopts high standards and criteria for the quality of services and the professional competencies for specialized staff in the niche tourism.

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