

RESEARCH REPORT: GLOBAL SPA SUMMIT 2011

Wellness Tourism and Medical Tourism: Where Do Spas Fit?



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About Global Spa Summit

The Global Spa Summit (GSS) is an international organization that brings together leaders and visionaries to positively impact and shape the future of the global spa and wellness industry. Founded in 2006, the organization hosts an annual invitation-only Global Spa Summit where top industry executives gather to exchange ideas and advance industry goals. For more information on the Global Spa Summit, please visit: www.globalspasummit.org.

About the Research Team

Katherine Johnston: Katherine Johnston, independent consultant, was the lead author and researcher for two major industry studies commissioned by the Global Spa Summit: *Spas and the Global Wellness Market* (2010) and the *Global Spa Economy* study (2008). Also serving as a Senior Economist at SRI International, Ms. Johnston has extensive experience in industry cluster analysis, regional competitiveness assessments, economic modeling, and economic strategy development. Since joining SRI over 11 years ago she has conducted economic and industry research projects in over two dozen countries and many U.S. states and cities. She has also conducted studies for numerous corporations, nonprofits, and international organizations, including the FedEx Corporation, the Ford Foundation, the International Finance Corporation, and the UN's International Trade Centre.

László Puczkó: Dr. László Puczkó is a managing director and head of the tourism section at Xellum Ltd. He has served as a Board Member of the Travel and Tourism Research Association Europe Chapter Board (2008-2010), Professor at Corvinus University Budapest (Tourism Competence Centre), and President of the Association of Tourism Consultants (Hungary). He is also co-author of the book *Health and Wellness Tourism*. Dr. Puczkó's main areas of expertise are in tourism research, strategy preparation, planning, and management in the following areas: health/wellness/spa tourism, heritage and cultural tourism, national/regional/local planning, and product and project development. He has led over 100 regional and international consultancy and research projects in these areas.

Melanie Smith: Melanie Smith (PhD) is a lecturer, researcher, and consultant from Corvinus University of Budapest, specializing in wellness tourism and medical tourism. She is chair of The Association for Tourism and Leisure Education (ATLAS) and founder of the ATLAS Spa and Wellness Special Interest Research Group. She is also co-author of the book *Health and Wellness Tourism*, as well as several journal articles and book chapters on this theme. Dr. Smith has undertaken research studies on holistic tourism worldwide, wellness tourism in Europe, and Muslim wellness traditions, and she is currently establishing a project on the role of thalassotherapy in seaside (re)development.

Susie Ellis: Susie Ellis (MBA) is president of SpaFinder, Inc., the leading global spa/wellness media and marketing company. Author of SpaFinder's annual *Spa Trend Report*, now in its eighth year, she is a recognized industry analyst and speaker and a regular contributor to *NewBeauty* magazine. Ms. Ellis is a founder and board member of the Global Spa Summit, and a member of the board of the Center for Medical Tourism Research (CMTR) and the Spa Advisory Board for the University California-Irvine's Spa and Hospitality Management Program. Her articles are featured in leading industry publications, and she is frequently quoted in media including *The New York Times*, *USA Today*, and *The Daily Telegraph*.

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Introduction

As medical tourism and wellness tourism are growing and garnering increasing attention in countries around the world, both businesses and governments are grappling with how to define, organize, and promote these sectors. This conundrum is especially challenging for the spa industry, because spas can and do offer services and products that cut across both the wellness tourism and medical tourism realms, and the integration of spas into these markets varies widely across different countries and regions.

This report aims to synthesize the key trends, developments, and challenges emerging with the growth of medical tourism and wellness tourism, and to present a number of considerations and recommendations for the spa industry to take full advantage of medical tourism and wellness tourism opportunities moving forward.

While there is a growing archive of medical tourism research, the focus on the newer concept/market of wellness tourism in this report is a crucial industry “first.” Governments, tourism associations and the press may have devoted more attention to the more established medical tourism, but SRI International, in their landmark report “Spas and the Global Wellness Market” (released at the 2010 Global Spa Summit), found that wellness tourism already represents a \$106 billion global industry – generating more than double the revenues of the \$50 billion medical tourism market. Analyzing the emerging opportunities for spas – and how they can best position themselves – within wellness tourism, is an idea whose time has come.

The analysis and recommendations presented here are based on three core pieces of research, conducted during February-March 2011:

- 1)** In-depth case study research on 12 countries that are considered to be leaders or emerging players in medical tourism and/or wellness tourism. The 12 countries were selected to showcase the variety of ways in which countries are looking at (or not looking at) medical tourism or wellness tourism, and special effort was made to select countries representing all regions of the world. The research methodology included both primary and secondary (web-based) approaches, including telephone interviews with 40 individuals who play leading roles in developing, promoting, and/or analyzing medical tourism and wellness tourism in the 12 selected countries. These case studies represent probably the first attempt at compiling and presenting comparable, in-depth, country-specific analysis and data about medical tourism and wellness tourism developments in countries around the world.
- 2)** A web-based survey of spa industry leaders around the world (as represented by delegates of the Global Spa Summit and their colleagues and associates), collecting industry insights and opinions on the opportunities and challenges presented by medical and wellness-related tourism developments.

- 3) Interviews with leading “thinkers” and stakeholders around the world who are working in (or studying) the medical tourism and wellness tourism markets.

This report is designed, first and foremost, to provide a strong foundation of research and analysis for global spa industry members, in order to:

- Help the industry understand and compare medical tourism and wellness tourism trends and developments in a cross-section of countries around the world.
- Highlight some of the key challenges and gaps in the research and information available for understanding medical tourism and wellness tourism – especially challenges related to definitions and data.
- Provide synthesized analysis on the varying approaches used by different countries to develop, organize, and promote medical tourism and wellness tourism.
- Present some specific considerations and recommendations for the global spa industry to address or pursue, to best position themselves to take advantage of medical tourism and wellness tourism opportunities.

However, given that medical tourism and wellness tourism are still emerging and rapidly growing sectors – and given that industry and consumer-based research in these sectors is growing but not widespread – the information and analysis presented here should also be of interest to other stakeholders, practitioners, and researchers with a stake in medical tourism and wellness tourism (whether in hospitality, tourism, government, etc.). There is far more research work to be done on the topics of medical and wellness tourism, and the Global Spa Summit’s goal with this study is to provide a possible starting point or springboard for ongoing and more in-depth research.

Research Scope and Methodology

The research conducted for this study aimed to be as representative as possible of what is happening worldwide in both medical tourism and wellness tourism. The researchers therefore carefully selected the case study countries, with the aim of selecting countries that are a good representation of the regions in which they are located. The selected case study countries are not necessarily “more advanced” than others in terms of medical tourism and wellness tourism (in fact, some of the countries have only recently started to focus on these markets, or are focusing only on one but not the other), but instead reflect a wide range of trends and stages of development.

The persons selected as interviewees for the study were also chosen to reflect a diverse range of countries, organizations, and initiatives. Altogether, 40 interviews were carried out with key experts and stakeholders worldwide in the fields of medical tourism and wellness tourism. Three groups of interviewees were selected: experts who have a broad-based, global understanding of the medical tourism and wellness tourism markets; representatives from the 12 countries that were included as case studies; and representatives with a knowledge of up-and-coming initiatives, concepts, and destinations.

It is, of course, impossible to mention all of the global developments in medical tourism and wellness tourism, but this study aims to represent all of the world’s major regions and also to reflect most of the current trends in these fields.

Executive Summary

Wellness Tourism and Medical Tourism: Where Do Spas Fit? presents a broad-based and in-depth look at key trends, developments, and challenges emerging with the growth of medical tourism and wellness tourism. Commissioned by the Global Spa Summit, this report seeks to provide a strong base of research and analysis to assist the spa industry – and other private sector and government stakeholders – in positioning themselves to take full advantage of the growing opportunities in these markets. The report contains four pieces of analysis:

Part I: In-depth analysis of four critical “issues” related to medical tourism and wellness tourism (definitions, data, organizational structures, and promotion/development).

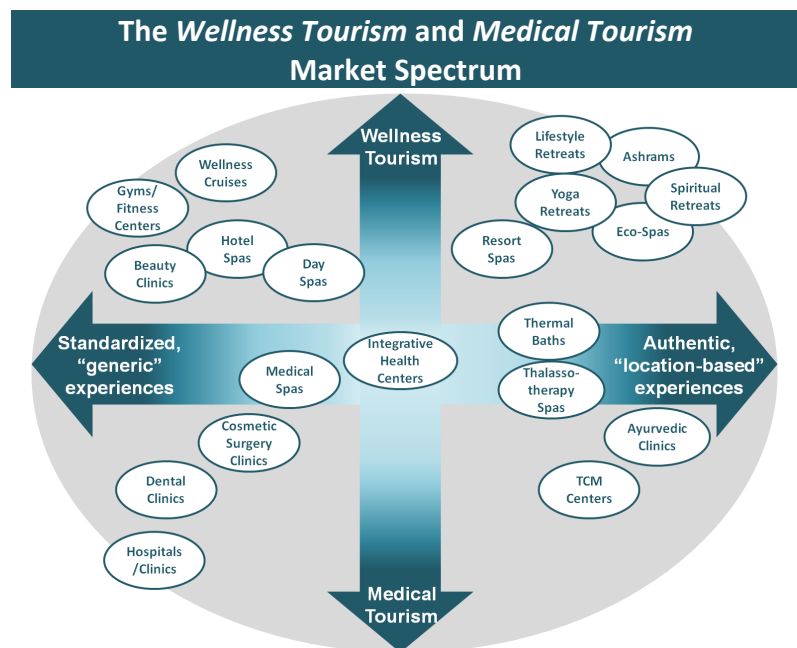
Part II: Case studies of the approaches used by 12 representative countries in developing and promoting medical tourism and wellness tourism, along with other emerging concepts, products, and regional initiatives to be aware of in these markets.

Part III: Detailed findings from a survey of over 200 spa industry stakeholders about their views on and understanding of medical tourism and wellness tourism.

Part IV: Recommendations for the spa industry (as well as other interested stakeholders) to pursue in order to raise the visibility and role of spas in the medical tourism and wellness tourism sectors.

A Model for Understanding Wellness Tourism and Medical Tourism

This study presents a new “model” for envisioning and understanding the medical tourism and wellness tourism sectors, emphasizing two elements: 1) the clear distinction between what is medical tourism versus what is wellness tourism (since these markets are sometimes confused); and 2) a continuum of product/service offerings that ranges from conventional or “generic” services/experiences (which may be available anywhere) to authentic or “location-specific” services/experiences (which spin out of a country’s special traditions and natural assets). All four



“typologies” of medical tourism and wellness tourism offerings in this continuum are important and potentially lucrative markets. However, industry stakeholders should carefully consider the varying opportunities and tourist needs/interests across the four quadrants when developing and marketing a menu of offerings for medical tourists and/or wellness tourists.

Key Findings and Conclusions

Role of Spas in Wellness Tourism and Medical Tourism

- Spas are an important part of wellness tourism, but wellness is about much more than just spas.
- Spas have an increasing role to play in medical tourism, but ongoing discussion is needed to identify the most appropriate use of spas in pre- and post-medical procedures, in rehabilitation and recuperation, and for accompanying caregivers.

Definitional Issues

- The terms medical tourism and wellness tourism are defined and applied inconsistently around the world, and this can cause confusion for industry, consumers, and governments. Establishing clear and consistent definitions for both terms would improve marketing and product development, reduce consumer confusion, and support improvements in data collection.
- The term health tourism is even more inconsistent and confusing: it is sometimes used as a substitute for medical tourism; sometimes it is used synonymously with wellness tourism; sometimes it is used to mean both; and sometimes it is used to refer to a subset of medical tourism or wellness tourism. Caution should be used with this term – especially in marketing and communicating to consumers.
- This study suggests definitions for medical tourism and wellness tourism that are based on the characteristics and motivations of the travelers, and not the characteristics of the destination they are visiting:

Medical Tourism	Wellness Tourism
<p>Medical tourism involves people who travel to a different place to receive treatment for a disease, an ailment, or a condition, or to undergo a cosmetic procedure, and who are seeking lower cost of care, higher quality of care, better access to care or different care than what they could receive at home.</p>	<p>Wellness tourism involves people who travel to a different place to proactively pursue activities that maintain or enhance their personal health and wellbeing, and who are seeking unique, authentic or location-based experiences/therapies not available at home.</p>
<p>Medical tourist: Generally ill or seeking cosmetic/dental surgical procedures or enhancements.</p>	<p>Wellness tourist: Generally seeking integrated wellness and prevention approaches to improve their health/quality of life.</p>

Data Issues

- Generally speaking, medical tourism data is more widely available than wellness tourism data. However, overall data availability for both sectors – both at the country level and global level – is spotty, unreliable, and inconsistent.
- A number of reasons can be cited for the lack of reliable, widely-available data: 1) both sectors are relatively new, and appropriate data collection mechanisms have not yet been established; 2) it is difficult to “measure” sectors that are not yet well-defined; and 3) it can be difficult or impossible to identify “true” medical tourists and wellness tourists versus incidental visitors to medical- and wellness-related facilities (leading to issues of data inflation and over-counting).

Organizational Structures

- Organizational structures for developing, supporting, and promoting medical tourism and wellness tourism vary from country to country, and they tend to be closely linked with the overall governing structure that exists in each country (e.g., centralized national government versus federal/state system, etc.). In general, governments in developing countries typically play a much more active role in guiding, supporting, and promoting the tourism sector, while in developed countries tourism sector development and promotion are typically more private sector-driven or collaborative in nature.
- Medical tourism has typically been more actively supported and promoted by governments than wellness tourism (possibly because medical tourism has had a growing international profile in recent years, is easier to define, and is often seen as more “lucrative” by governments than wellness tourism; also because wellness tourism is a newer concept), but this is changing, and more countries and government are paying attention to both sectors.
- Countries with well-developed public-private collaborative bodies (e.g., medical tourism or wellness tourism cluster networks or associations with broad participation) typically function more effectively in promotion and development than those with fragmented, ad hoc structures.
- Spa/wellness associations can provide greater strength and lobbying power to the wellness tourism sector and can play a critical role in education and training, regulation, accreditation, quality standards, and marketing.

Promotion and Development

- In most countries’ promotional materials (such as their national tourism websites), wellness tourism tends to be more heavily emphasized than medical tourism. Wellness tourism promotion also tends to be very much dominated by spas (even if the country possesses many other wellness-related offerings). The degree of emphasis on unique/local offerings and traditions varies from country to country and seems to be increasing over time.

- Medical tourism promotion tends to be more private sector-driven. A typical promotion and marketing approach for medical tourism is for a country to work on reaching potential tourists through medical tourism facilitators, rather than engaging in direct online promotion and positioning through typical tourism promotion channels.
- The countries with the most well-developed medical tourism and/or wellness tourism sectors and brand images also tend to be those where the national government has already established itself as a leading player in promoting these sectors.
- Many countries do not yet have a strong national brand image for medical tourism or wellness tourism – even countries that are considered to be leading players in these markets. Too many “generic” or standardized products/services are offered, and most countries are not effectively drawing on their specialties, or their immense wealth of indigenous, traditional, and natural asset-based wellness and healing traditions.
- As the medical tourism and wellness tourism markets become more crowded and competitive, it will become increasingly important for countries to differentiate themselves based on factors other than cost and quality alone.

Emerging Trends

Emerging concepts, products, and initiatives related to medical tourism and wellness tourism, which industry members should be aware of, include the following:

- Regional/cross-country marketing and branding initiatives that bring together countries with similar features and resources, such as *Nordic Wellbeing*, *Alpine Wellness*, and marine medical tourism (thalassotherapy).
- Holistic, integrated, and lifestyle-oriented concepts that emphasize the pursuit of a more balanced lifestyle (including holistic retreats/spas and wellness centers).
- Active holiday concepts and products (such as sports and adventure tourism), which are increasingly combined with wellness tourism.
- Sustainable and eco-friendly concepts and products, including eco-spas, “slow” and organic food, and natural and mineral cosmetics.

Recommendations

The report presents 14 initiatives that could be pursued by the Global Spa Summit, regional/country-based industry associations, and individual businesses in order to take advantage of opportunities in the medical tourism and wellness tourism markets.

Definitions & Terminology	Partnerships & Collaboration
<ol style="list-style-type: none"> 1) Establish clear and consistent definitions for <i>medical tourism</i> and <i>wellness tourism</i> and emphasize the distinctions between the two. Minimize the use of the term <i>health tourism</i>. 2) Establish basic, flexible definitions and typologies of spas that can be used and applied worldwide. 	<ol style="list-style-type: none"> 3) Encourage a cooperative spirit between medical tourism and wellness tourism, and carefully build collaborative relationships with key players in both sectors. 4) Support the development and expansion of national, regional, and international spa associations that can serve as platforms for communication, lobbying, information sharing, standards-setting, and other efforts.
Differentiation & Branding	Product Development & Marketing
<ol style="list-style-type: none"> 5) Develop a strong and unique brand by emphasizing <i>authentic, location-based, and signature</i> offerings that draw directly from unique local traditions and natural assets. 6) Don't just promote a long menu of generic services and products. Focus on and promote what you are really good at – the areas in which you have a well-developed and recognized specialization or strength. 	<ol style="list-style-type: none"> 7) Capture the “borderline” wellness tourists by packaging spa/wellness offerings with other kinds of experiences (sports, nature, etc.) 8) Recognize that there are opportunities for the spa industry in medical tourism, and pursue these opportunities carefully and collaboratively. 9) Market your offerings to domestic, intra-regional, and international medical and wellness tourists – all are strong opportunities, but may have very different needs and interests.
Emerging Opportunities	Data & Information
<ol style="list-style-type: none"> 10) Be flexible and open to emerging trends and product developments. Consider changing your menu of offerings, your approach, or even the name of your business for new markets. 11) Consider providing more eco-friendly, organic, natural, and locally-sourced products, services, treatments, and facilities. 12) Embrace the growing interest in holistic and lifestyle-oriented approaches to wellness. Build integrated packages that cater to tourists who want to “change their lives” on holiday. 	<ol style="list-style-type: none"> 13) Improve and expand data collection efforts for the spa industry, as well as for the medical tourism and wellness tourism sectors. 14) Continue to support development of a scientific evidence base for spa and wellness modalities.

Part I:

Wellness Tourism and Medical Tourism: Where Do Spas Fit?

Key Findings and Analysis

Part I: Wellness Tourism and Medical Tourism: Where Do Spas Fit? *Key Findings and Analysis*

Part I presents a synthesized analysis of key findings, trends, opportunities, and challenges related to medical tourism and wellness tourism. These sections represent an amalgamation of information, data, and other insights gathered through the country case study analysis (presented in detail in *Part II*), the spa industry survey (presented in detail in *Part III*), as well as extensive interviews with key stakeholders, “thinkers,” and leaders in the field.

The findings presented below focus on four critical “issues” related to medical tourism and wellness tourism:

- A. Definitions** of key terms (*medical tourism, wellness tourism, and health tourism*)
- B. Data** and statistics available to measure medical tourism and wellness tourism
- C. Organizational structures** used in various countries’ medical tourism and wellness tourism sectors
- D. Promotion and development** approaches used by various countries to support and grow their medical tourism and wellness tourism sectors

Note that the analysis in this section of the report is partially based upon findings from 12 in-depth country case studies (which are presented in *Part II* of the report): Australia, Austria, Brazil, Canada, Hungary, India, Indonesia, Jordan, Morocco, Philippines, South Africa, and Thailand. These countries were selected as case studies because they represent a wide cross-section of approaches to medical tourism and wellness tourism; they are at varying stages of development in these sectors; and they represent a mix of geographic regions around the world. This list of countries is not exhaustive and by no means represents all of the countries that are considered to be current or potential players in the medical tourism and wellness tourism markets.

A. Definitions

While seemingly straightforward concepts at first glance, the terms *medical tourism* and *wellness tourism* are deceptively difficult to define. Starting at the simplest level, most people who are involved in these sectors would generally agree that *medical tourism* is undertaken by people who are sick (or who have some kind of ailment/condition); *wellness tourism* is undertaken by people who are healthy (or who are “well”). Moving beyond that basic dichotomy, the nuances and applications of both terms start to vary widely.

Even these simple definitions can pose challenges. For example, if a healthy person travels to pursue preventive care from a medical doctor, is that *medical tourism* or *wellness tourism*? If a person with rheumatoid arthritis travels to participate in a yoga/meditation retreat to help address the ailment, what label do we give that? If a healthy tourist gets a botox treatment at a medical spa, is that person a *medical tourist* or *wellness tourist*? If a country is promoting its traditional acupuncture practices for both sick and healthy travelers, is it promoting *medical tourism* or *wellness tourism*? Some industry analysts even argue that *medical tourism* “does not exist” and that *medical travel* is a more appropriate term – for, if we assume that tourism is an activity pursued for pleasure/leisure, how can that possibly co-exist with a trip that involves a major surgical procedure to treat a health condition? And to complicate matters further, the term *health tourism* is also used widely in relation to both medical and wellness tourism, and its uses and definitions are even more fragmented and inconsistent. All three terms – *medical tourism*, *wellness tourism*, and *health tourism* – are sometimes even used interchangeably, further muddling their meanings.

These kinds of definitional issues are nothing new to members of the spa industry; in many ways they parallel the challenges that the spa industry faces in the definition and usage of the word *spa*. In pondering such definitional issues, one might ask, why even bother defining these terms? Do we even need a common definition of *medical tourism* and *wellness tourism*? From the perspective of the spa industry – and many others involved in tourism, medicine, and related fields – these definitions are, in fact, very important.

In a survey of over 200 members of the global spa industry:¹

- 89% felt that the terms *medical tourism* and *wellness tourism* are used and defined inconsistently around the world.
- 95% felt that these inconsistent definitions cause confusion for consumers.
- 95% felt that the spa industry should work to establish and use common definitions for these terms.

Given that there is no global authoritative body to establish definitions and enforce their proper usage, it would be useful for participants in the *medical tourism* and *wellness tourism* sectors to start using and applying both terms in a more consistent manner. The benefits of establishing definitional consistency are numerous:

¹ See *Part III* of this report for detailed survey results.

- It would help providers of *medical tourism* and *wellness tourism* services and products to position themselves appropriately in the marketplace, to target the “right” consumer groups, and to identify potential partners for product and service development.
- It would enable consumers to better understand what is being marketed to them, and to compare *medical tourism* and *wellness tourism* offerings across different providers and across different countries and regions around the world.
- It would support the improvement of data collection, research/analysis, and benchmarking for the *medical tourism* and *wellness tourism* sectors – efforts that would support all stakeholders who are seeking to grow and develop the industry.

Recognizing the challenges – but also the benefits – inherent in defining such amorphous terminology, an inherent goal in this study is to establish industry-driven definitions for the terms *medical tourism* and *wellness tourism*, which can be used consistently – but also flexibly – by spa industry stakeholders who are participating in these sectors. It is the hope of the spa industry that in pursuing greater consistency in using these labels, other participants in these sectors may also follow suit.

Varying Definitions of Medical Tourism, Wellness Tourism, and Health Tourism

In establishing industry-driven definitions for these terms, it is useful to first consider the definitions that are already in the marketplace. As mentioned above, there is no “global authority” on this terminology. The sections below will explore some of the definitions currently in use by key stakeholder groups for both *medical tourism* and *wellness tourism*, before proposing a more harmonized definition for use by the spa industry. We will also consider below the various applications of the term *health tourism* – although this term is so inconsistently used that we feel it is not possible to propose a consistent industry-driven definition at this time.

Definitions of Medical Tourism

Definitions from an international organization/association. The Medical Tourism Association is probably the most widely recognized international trade association representing the medical tourism and global healthcare industry. The Medical Tourism Association’s definition for the term *medical tourism* is presented in the box below. Note that this definition emphasizes the variety of traveler motivations for engaging in *medical tourism* – affordability, better access to care, or higher quality of care.

Medical Tourism is where people who live in one country travel to another country to receive medical, dental and surgical care while at the same time receiving equal to or greater care than they would have in their own country, and are traveling for medical care because of affordability, better access to care or a higher level of quality of care. “Domestic Medical Tourism” is where people who live in one country travel to another city, region or state to receive medical, dental and surgical care while at the same time receiving equal to or greater care than they would have in their own home city, and are traveling for medical care because of affordability, better access to care or a higher level of quality of care.

Medical Tourism Association²

Definitions from selected researchers/analysts. The only truly comprehensive analytical study of the medical and wellness tourism sectors is the book *Health and Wellness Tourism*, published in 2009 by authors Melanie Smith and László Puczkó. Drawing from the industry and academic literature available on the topic, the authors post a definition of *medical tourism* that emphasizes the two types of medical treatments pursued by medical tourists: surgical treatments (e.g., operations) or therapeutic treatments (e.g., “participating in healing treatments”).

Medical tourism can be defined as travel to destinations to undergo medical treatments such as surgery or other specialist interventions...Medical tourism [...] can have two major forms: surgical and therapeutic. There is a clear distinction between the two. Surgical certainly involves certain operations(s), whereas therapeutic means participating in healing treatments.

Smith and Puczkó (2009), *Health and Wellness Tourism*³

² See: <http://www.medicaltourismassociation.com/en/medical-tourism-faq-s.html>.

³ Melanie Smith and Laszlo Puczkó, *Health and Wellness Tourism*, Oxford: Elsevier (2009), p. 101.

In 2008, the *International Medical Travel Journal* published an article that attempts to define the contemporary medical tourism market and differentiate it from the more historical model of “international medical travel” (see box below). Note that this definition emphasizes the direction or flow of travel between industrialized nations and developing nations, and suggests that *medical tourism* specifically relates to patients traveling from industrialized to less developed countries.

Medical tourism is a rapidly evolving trend wherein patients from industrialized nations seek health care in less developed countries, bypassing services offered in their own communities. Although the term medical tourism is sometimes used in reference to all travel for medical care, we believe that this phenomenon is meaningfully different from the traditional pattern of international medical travel. In the traditional model, patients journey from less developed nations to major medical centers in highly developed countries for advanced medical treatment. In the medical tourism model, driven by a number of forces outside of the organized health care system and traditional medical referral network, an increasing number of patients travel to an assortment of countries at variable levels of development for their health care needs. The evolution of medical tourism has transformed the unidirectional pipelines of patients traveling towards industrialized nations for health care into a complex network of two-way highways.

Horowitz and Rosensweig (2008), *International Medical Travel Journal*⁴

Also in 2008, Dr. Prem Jagyasi – an internationally-known medical tourism consultant – produced for *Medical Tourism Magazine* an analysis of the need to better define *medical tourism* and suggested the definition in the box below. Note that this definition emphasizes the combination of seeking medical services along with other travel experiences (e.g., business, leisure). Dr. Jagyasi then goes on to elaborate the five major factors involved in the decision-making process for medical tourists: “Affordable, Accessible, Available, Acceptable and Additional.”

Medical Tourism is the set of activities in which a person travels often long distance or across the border, to avail medical services with direct or indirect engagement in leisure, business or other purposes.

Jagyasi (2008), *Medical Tourism Magazine*⁵

Definitions from individual countries. Looking on a country-by-country basis, most individual countries have no “official” definition for *medical tourism* – so regional or country-specific definitions must be inferred from what governments are actually supporting or promoting (or what kinds of services tourists are actually traveling to the country to obtain). This report includes in-depth case studies of 12 countries, some of which are considered to be global leaders in *medical tourism*. These countries’ “definitions” of *medical tourism* could be characterized as described below:

⁴ Michael Horowitz and Jeffrey Rosensweig, “Medical Tourism vs. Traditional International Medical Travel: A Tale of Two Models,” *International Medical Travel Journal*, 2008, p. 1-14, <http://www.imtjonline.com/articles/2008/medical-tourism-vs-traditional-international-medical-travel-a-tale-of-two-models/>.

⁵ Prem Jagyasi, “Defining Medical Tourism – Another Approach,” *Medical Tourism Magazine*, July 15, 2008, <http://www.medicaltourismmag.com/issue-detail.php?item=136&issue=6>.

Selected Country-Specific Definitions of <i>Medical Tourism</i>	
Country	Medical Tourism “Definition” or Offerings
Australia	Australia is not yet a player in the global medical tourism market, but a national study assessing the country’s opportunities in medical tourism posted the following definition: <i>Medical tourism is defined as the sum of all the relationships and phenomena resulting from a journey by people whose primary motive is to treat or cure a medical condition by taking advantage of medical intervention services away from their usual place of residence while typically combining this journey with the consumption of tourism products and services.</i> ⁶
Austria	Medical tourism for international tourists in Austria tends to include medical treatments at hospitals, clinics, and rehabilitation centers, with visitors attracted by the high quality of care.
Brazil	Medical tourism in Brazil primarily involves cosmetic/plastic surgery, but other surgical and medical treatments are also on the rise.
Canada	Canada has very little medical tourism, other than Americans visiting to obtain cheaper treatments than what is available in the United States.
Hungary	Hungary’s medical tourism offerings include a mix of “mainstream” medical and surgical treatments (primarily for international tourists), as well as evidence-based therapies related to natural healing assets such as thermal/medical baths (primarily for domestic tourists).
India	Medical tourism in India primarily involves medical and surgical treatments in hospitals and clinics, but the country also promotes complementary traditional therapies (such as Ayurveda).
Indonesia	Indonesia is not yet a major player in medical tourism, but the country’s efforts are to develop “Western” medical and surgical treatments, integrated with Indonesian traditional medical practices.
Jordan	Medical tourism in Jordan solely involves Western-style medical and surgical treatments and procedures performed in hospitals and clinics.
Morocco	Medical tourism is a new/developing sector in Morocco and primarily involves cosmetic/plastic surgery at the present time.
Philippines	The Philippines’ medical tourism sector involves a wide range of Western-style medical and surgical treatments performed at hospitals and clinics. The country is also working to develop “retirement/long-term care tourism” as a sub-set of medical tourism.
South Africa	Medical tourism in South Africa primarily involves cosmetic/plastic surgery, along with other medical and surgical treatments, and is often packaged with other leisure and tourism offerings (such as safaris, sun/sand).
Thailand	Medical tourism in Thailand solely involves Western-style medical and surgical treatments and procedures performed in hospitals and clinics.

See *Part II* of this report for further elaboration of each of each country’s medical tourism markets and trends.

⁶ See: <http://www.crctourism.com.au/wms/upload/Resources/120002%20Health%20Tourism%20In%20Australia%20WEB.pdf>.

- For five out of the 12 countries (India, Indonesia, Jordan, Philippines, Thailand), *medical tourism* almost exclusively involves “Western-style” medical and surgical treatments, almost always performed at hospitals and clinics and with a medical doctor present. Travelers to these countries are either: 1) persons from developed countries motivated by a good quality of care available at inexpensive prices; or 2) persons from within the region (e.g., people traveling within Asia to other Asian countries) motivated by the need to obtain care not available at home; or 3) persons from the country’s large expat community or diaspora (often the major source of medical tourists). A few of these countries (India, Indonesia) are making more concerted efforts to integrate alternative/traditional therapies with conventional medical offerings.
- For three of the countries (Brazil, Morocco, South Africa), *medical tourism* primarily involves cosmetic and plastic surgery, although other medical and surgical treatments are increasingly performed as well. Travelers to these countries are primarily cost-motivated, or seek to combine the medical procedure with a vacation in a nice setting.
- In the two European countries (Austria and Hungary), *medical tourism* includes a mix of “mainstream” medical and surgical treatments (primarily for international tourists), as well as medical therapies based on natural and evidence-based healing assets such as thermal/mineral waters (primarily for domestic tourists) and provided by medical professionals.⁷

⁷ Note that in these countries (and elsewhere in Central/Eastern Europe), the definition of *medical tourism* tends to be more blurred with *wellness tourism*, as it can be difficult to draw a line between the use of water-based assets for medical/curative purposes versus for wellness/preventive practices.

Definitions from spa industry stakeholders. A survey of global spa industry members conducted for this study asked respondents to define the term *medical tourism* using their own words. The research team then coded and categorized these responses, based on keywords and terminology used by the respondents.

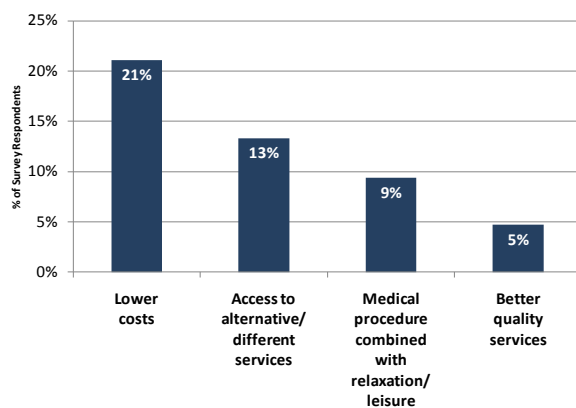
Among the 128 survey respondents who answered this question:

- 38% used a very general definition for *medical tourism*, stating that it involves travel for the purpose of obtaining some kind of medical or healthcare service or procedure.
- 34% emphasized tourists' motivations for engaging in medical tourism (e.g., lower costs, better quality, access to services not available at home, or combining medical procedures with relaxation/leisure).
- 38% emphasized the type of service sought by medical tourists (e.g., surgery/invasive procedure, elective procedure, cosmetic procedure, preventive care, rehab, medical spa).

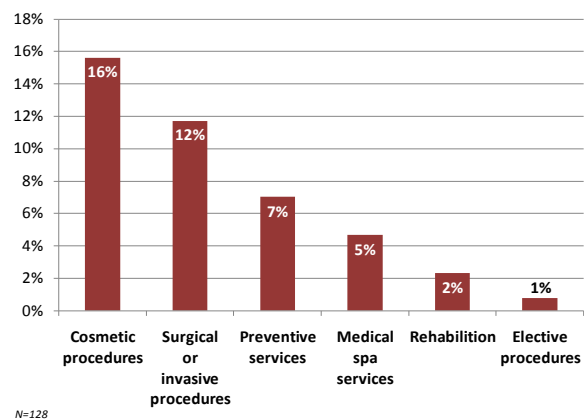
In addition, 2% of survey respondents stated that wellness tourism is the same as medical tourism.

When asked to define *medical tourism* in their own words, spa industry survey respondents emphasized the following:

Tourist motivations for medical tourism:



Types of services sought by medical tourists:



Definitions of Wellness Tourism

Definitions from international organizations/associations. There is no global industry body equivalent to the Medical Tourism Association for the wellness tourism sector, so no internationally-based definitions of *wellness tourism* are available. In order to understand and define *wellness tourism*, however, one must also understand and define the concept of *wellness*. *Wellness* is a relatively modern word and concept, which has been gaining currency over the last decade or two (and is believed to have been introduced in the modern era by Dr. Halbert Dunn, in the 1950s and 1960s). In this regard, a couple of key definitions are available. The U.S.-based National Wellness Institute (NWI), founded in 1977, is well-established as a leading organization in the wellness field, founded by one of the leaders of the movement, Dr. Bill Hettler. NWI's definition of *wellness* is provided below.

Wellness is an active process through which people become aware of, and make choices toward, a more successful existence.

National Wellness Institute⁸

A 2010 study by the Global Spa Summit and SRI International provided a comprehensive review of the history and evolution of the concept of *wellness* (and more information about the key “leaders” in the wellness movement, some of whom are mentioned above, can be found in that report). Rather than provide a specific definition of the term, the study suggests five key dimensions of *wellness* that integrate the thinking from a number of leading figures in the field (described below).

The World Health Organization's definition of “health” is a convenient, internationally recognized description that captures the broad tenets of wellness. This definition – adopted by the WHO in 1948 – was significant in the fact that it went beyond just the physical state of freedom from disease and emphasized a positive state of being that includes mental and social dimensions. It also laid the groundwork for much of the ongoing thinking about wellness in the mid-20th century.

Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity. ~Preamble to the Constitution of the WHO

While recognizing that there are regional variations in the concept of wellness, several common threads stand out across the various definitions of wellness:

- *Wellness is multi-dimensional.*
- *Wellness is holistic.*
- *Wellness changes over time and along a continuum.*
- *Wellness is individual, but also influenced by the environment.*
- *Wellness is a self-responsibility.*

GSS/SRI (2010), *Spas and the Global Wellness Market*⁹

⁸ See: http://www.nationalwellness.org/index.php?id_tier=2&id_c=26.

⁹ Global Spa Summit and SRI International, *Spas and the Global Wellness Market*, 2010, p. ii, http://www.globalspasummit.org/images/stories/pdf/gss_sri_spasandwellnessreport_rev_82010.pdf. A variety of alternate definitions of wellness (both historical and contemporary) are provided in this report, so additional definitions will not be reviewed here.

Definitions from selected researchers/analysts. From a research perspective, *wellness tourism* tends to be frequently partnered and cross-referenced with *medical tourism* (and/or the even more ambiguous concept of *health tourism*). *Wellness tourism* is also a much newer concept than *medical tourism*. So, it is difficult to pinpoint sources that define and explore the concept of *wellness tourism* on its own. A scan of the available academic and industry-based literature reveals that definitions tend to run the gamut from linking *wellness tourism* almost exclusively with the spa sector, to linking it with a myriad of related niche tourism products including traditional/Asian healing arts, holistic healing, retreats, spirituality, sports/fitness, ecotourism, agritourism, culinary tourism, and so on.

The box below provides sample definitions of *wellness tourism* from two of the few academic journal articles specifically focusing on *wellness tourism*. Note that the first definition emphasizes the motivation of the tourist, and specifies that *wellness tourism* is by nature an “active” – not a “passive” – pursuit. The second definition, by contrast, focuses more specifically on where wellness tourists go and what activities they pursue during their trip.

...in order to qualify as a contemporary wellness tourism experience, we would contend that some deliberate contribution has to be made to psychological, spiritual or emotional well-being in addition to physical. This takes wellness tourism from the realm of being merely a passive form of tourism with a focus on escapism to one where tourists are purposefully driven by the desire to actively seek enhanced wellness.

Smith and Kelly (2006), *Tourism Recreation Research*¹⁰

Wellness tourism is the sum of all the relationships and phenomena resulting from a journey and residence by people whose main motive is to preserve or promote their health. They stay in a specialized hotel which provides the appropriate professional knowhow and individual care. They require a comprehensive service package comprising physical fitness/beauty care, healthy nutrition/diet, relaxation/meditation and mental activity/education.

Mueller and Kaufmann (2001), *Journal of Vacation Marketing*¹¹

In their 2009 book *Health and Wellness Tourism*, Smith and Puczkó do not offer a specific definition of *wellness tourism*, but instead suggest that “the tourism industry is increasingly recognizing the need for segmentation *within* the wellness market [...], and a clear differentiation of products is needed.”¹² They go on to elaborate on and define a number of sub-segments in the *wellness tourism* market, including spa tourism, thalasso tourism, holistic tourism, yoga and meditation tourism, and spiritual tourism.

¹⁰ Melanie Smith and Catherine Kelly, “Wellness Tourism,” *Tourism Recreation Research*, Vol. 31.1 (2006), <http://ferdamalastofa.is/upload/files/wellness.pdf>.

¹¹ Hansruedi Mueller and Eveline Lanz Kaufmann, “Wellness Tourism: Market analysis of a special health tourism segment and implications for the hotel industry,” *Journal of Vacation Marketing*, Volume 7.1 (2001), http://lanz-kaufmann.ch/doc/pub_art_vacationmeeting.pdf.

¹² Smith and Puczkó (2009), p. 84.

In the online magazine, *Travel to Wellness* (which professes to be the first and only editorially-driven, monthly online magazine focusing on the wellness-related travel market), the following definition is provided for *wellness tourism*:

Wellness Travel is about travelling for the primary purpose of achieving, promoting or maintaining maximum health and a sense of well-being. It's about being proactive in discovering new ways to promote a healthier, less stressful lifestyle. It's about finding balance in one's life. It begins with intent.

Travel on the path to wellness can include spa treatments, healthy eating, outdoor fitness activities (hiking, cycling, mindful walking, yoga, paddling and cross-country skiing or snowshoeing), inspirational outings and adventures that clear or expand the mind, and educational programs that teach us how to incorporate healthy habits into our everyday lives. It can be as simple as taking off for a wellness weekend to relax, refresh, reenergize and rejuvenate. Think of it as pulling off the road of life to admire a sunset when you're stuck in a traffic jam, or tearing yourself away from your laptop to water the garden, when you're up-to-your-eyebrows in deadlines. Wellness Travel is the pause that reenergizes and rejuvenates.

Travel to Wellness¹³

In his online *Wellness Tourism Guidebook*, Dr. Prem Jagyasi provides the following definition of *wellness tourism*:

...wellness tourism is the process of a traveler seeking a journey specifically in order to improve or promote their health and wellbeing. The tourist will stay in a particular destination where they will be provided with various health-promoting physical activity, relaxation methods, and nutritious food in a comprehensive package. With the increase in individuals actively seeking out to better their health, there has been a burgeoning growth in the wellness tourism industry. This has led to several holistic centers, spas, wellness retreats, spiritual pilgrimages and other form of healthy therapies setting up shop to bring in foreign, health-seeking people.

Jagyasi (2006), *Wellness Tourism Guidebook*¹⁴

A couple of other periodical publications have been developed in the last couple of years which focus specifically on topics related to *wellness tourism* and which bear mentioning here:

- *Medical & Wellness Tourism* (MWT) claims to be “the first independent business-to-business monthly publication designed to promote and inform on the fast growing industry of medical and wellness tourism.”¹⁵ This publication does not provide a specific definition of *wellness tourism* on its website, but its coverage of the topic tends to focus heavily on spas, and to a lesser extent, thermal springs, yoga, meditation, Ayurveda, and other related activities.

¹³ See: <http://www.traveltowellness.com/abouttraveltowellness>

¹⁴ Dr. Prem Jagyasi, *Wellness Tourism Guidebook*, <http://www.drprem.com/wellness-tourism-guide/what-is-wellness-tourism.html>.

¹⁵ See: <http://www.mwtourism.com/>

- *Health Tourism Magazine* (launched in July 2009 by the Medical Tourism Association) focuses broadly on “health, wellness, alternative, and medical wellness issues.” This publication also does not provide a specific definition of *wellness tourism* on its website, but an article in its inaugural issue presents the concept of “medical wellness” as an offshoot of and corollary to medical tourism (and uses the label “health tourism” for these developments). A sample of the article’s discussion of this topic is provided below.

Medical wellness, in all its varied forms, is an industry that cannot be defined in a few words. Combining the medicinal, scientific aspect and the preventative, holistic approach of wellness, leaves such a wide gap for interpretation that makes it difficult to define the industry as a whole. More than looking for an exact definition, view these two approaches as separate beings, what they offer and how they come together to create an experience.

[...]As the medical tourism industry gains popularity, it is expected that health tourism will be positively affected. With globalization and hybridization of practices, the medical wellness industry is stepping into the new millennium and offering services the contemporary client needs. Not just focusing on one aspect of wellness, spas and medical wellness facilities are putting an emphasis on overall improvement in quality of life that harmonizes all the elements of body and soul in an international setting.

Stephano and Erazo (2009), *Health Tourism Magazine*¹⁶

Definitions from individual countries. Looking on a country-by-country basis, most individual countries have no “official” definition for *wellness tourism* – so regional or country-specific definitions must be inferred from what governments are actually supporting or promoting (or what kinds of services tourists are actually traveling to the country to obtain). This report includes in-depth case studies of 12 countries, some of which are considered to be global players in *wellness tourism*. These countries’ “definitions” of *wellness tourism* could be characterized as described below:

- In ten of the countries (all except India and Brazil), *wellness tourism* is primarily linked with spas, spa/resorts, thermal baths, or other water-based offerings.
- In four of the countries (Australia, Austria, Canada, Hungary – note that these are all “Western”/developed countries), *wellness tourism* tends to be primarily a domestic market, while in seven of the countries (generally speaking, the developing countries) it primarily involves international tourists.
- Most of the countries attempt to link traditional/historical or nature-based therapies and assets with *wellness tourism*, but the degree to which this actually plays out in a promotional sense varies.

¹⁶ Renee-Marie Stephano and Christin Erazo, “Health Tourism – The Integration of Health and Medical Wellness,” *Health Tourism Magazine*, July 15, 2009, <http://www.healthtourismmagazine.com/article-detail.php?issue=issue-1&article=Integration>.

Selected Country-Specific Definitions of *Wellness Tourism*

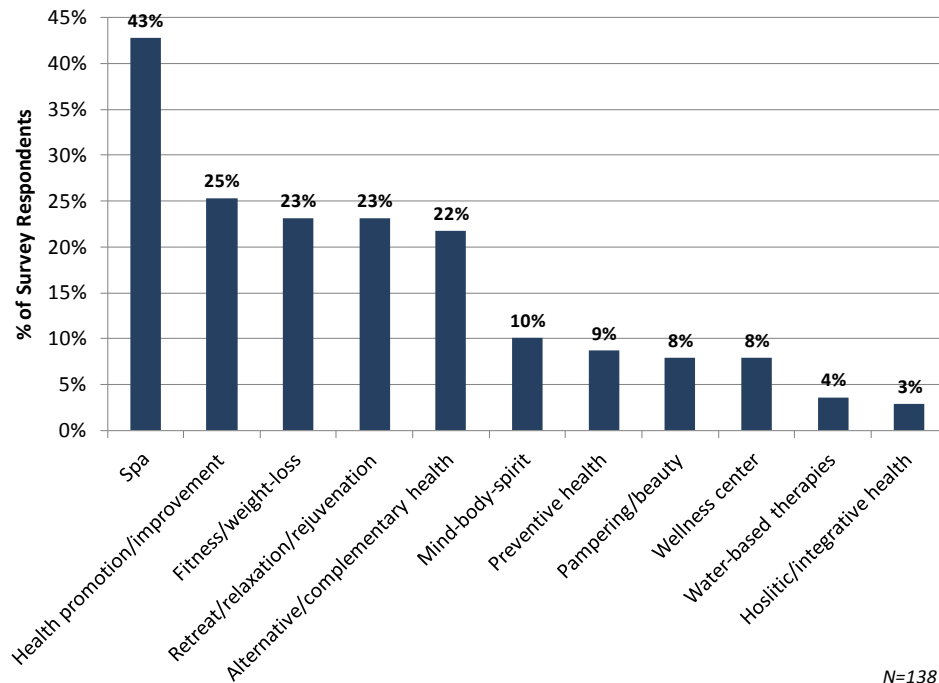
Country	Wellness Tourism “Definition” or Offerings
Australia	Wellness tourism in Australia is primarily domestic, short-break travel, and tends to be associated with spas, retreats, or outdoor/sports activities. A national study assessing the country’s opportunities to expand wellness tourism posted the following definition: <i>Wellness tourism is defined as the sum of all the relationships resulting from a journey by people whose primary motive is to maintain or promote their health and well-being and who stay at least one night at a facility that is specifically designed to enable and enhance people’s physical, psychological, spiritual and/or social well-being.</i> ¹⁷
Austria	Wellness tourism in Austria is primarily a domestic market and is dominated by thermal spas. International wellness tourists tend to visit spa/wellness hotels/resorts or mix spa/wellness activities with other activities (such as outdoors, adventure, etc.). The country emphasizes its “alpine spas” and “thermal” spas as key wellness-related offerings.
Brazil	Wellness tourism (and spa tourism) is an undeveloped market in Brazil, and the country is not actively promoting it yet.
Canada	Canada does not have a distinctive wellness tourism brand, but the market tends to be dominated by spas, retreats, and wellness centers (primarily serving the domestic market).
Hungary	Wellness tourism in Hungary almost exclusively means visits to “wellness hotels” (which offer thermal baths, wet areas, pampering treatments, fitness and beauty services, and healthy cuisine), and these largely serve the domestic market. International tourists tend to visit the country’s modern, purpose-built bath complexes and historic facilities.
India	India has long been a major destination for wellness tourism based on its traditions of yoga, meditation, Ayurveda, and other spiritual and healing practices; however, the country has not built a strong/clear promotional image for its wellness tourism sector as separate from its medical tourism sector.
Indonesia	Wellness tourism is a relatively new concept in Indonesia, and current developments are focusing on promoting their large spa/resort sector to international tourists (primarily in Bali).
Jordan	Wellness tourism in Jordan focuses primarily on the Dead Sea spas/resorts, promoted to regional and international tourists.
Morocco	Morocco has been promoting its wellness offerings to tourists for several decades, and the current focus is mainly on water-based offerings, including spas, hammams, balneotherapy, thalassotherapy, and sand baths.
Philippines	The spa industry is the centerpiece of wellness tourism in Philippines (mainly for regional and international tourists), and there is a focus on highlighting signature Filipino treatments such as Hilot.
South Africa	Wellness tourism promotion in South Africa focuses on uniquely African experiences (e.g., massages in the bush, vinotherapy), and it tends to be closely linked and packaged with outdoor activities (e.g., adventure, safari, beaches).
Thailand	Wellness tourism in Thailand tends to be primarily motivated by relaxation and pampering (visits to resorts and spas). The country’s holistic offerings have not always been well-linked with its wellness and spa offerings (other than Thai massage), but international tourist interest in these offerings is growing.
See Part II of this report for further elaboration of each of each country’s wellness tourism markets and trends.	

¹⁷ See: <http://www.crctourism.com.au/wms/upload/Resources/120002%20Health%20Tourism%20In%20Australia%20WEB.pdf>.

Definitions from spa industry stakeholders. A survey of global spa industry members conducted for this study asked respondents to define the term *wellness tourism* using their own words. The study team then coded and categorized these responses, based on keywords and terminology used by the respondents. Among the 138 survey respondents who answered this question:

- 43% associated *wellness tourism* with visiting a spa.
- Approximately one-quarter of respondents associated *wellness tourism* with each of the following concepts: health improvement or promotion; fitness and/or weight-loss; retreat/relaxation/rejuvenation; and alternative/complementary health practices/services.
- 2% stated that *wellness tourism* is the same as *medical tourism*.

When asked to define *wellness tourism* in their own words, spa industry survey respondents emphasized the following:



Definitions of Health Tourism

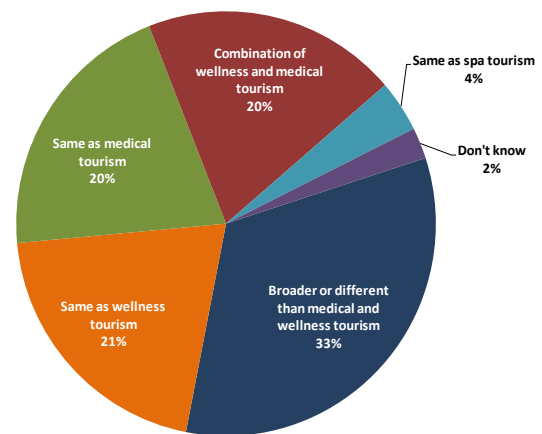
The main assessment that can be made about the definition of the term *health tourism* is that there is no consistent definition. The term is fairly widely used among stakeholders in both the *medical tourism* and *wellness tourism* sectors (not surprisingly, since the term *health* preceded both concepts). It is sometimes used as a substitute for *medical tourism*; sometimes it is used synonymously with *wellness tourism*; sometimes it is used to mean both; and sometimes it is used to refer to a subset of *medical tourism* or *wellness tourism*. Based on a review of the term's usage across various stakeholder groups, a couple of patterns emerge:

- Individual countries tend to use the term *health tourism* interchangeably with *medical tourism* (e.g., many promotional or analytical documents in specific countries refer to “health and wellness tourism” when they in fact mean “medical and wellness tourism”).
- Industry analysts and researchers tend to use the term *health tourism* as a concept that includes both *medical tourism* and *wellness tourism*.

The survey of global spa industry stakeholders conducted for this study is indicative of the confusion surrounding the term. When asked to define *health tourism* in their own words, respondents were fairly evenly split in their assessments:

- One-third of the respondents indicated that health tourism is different than medical and wellness tourism (e.g., either broader than these concepts or a subset of these concepts).
- 20% of respondents suggested that health tourism is a combination of medical and wellness tourism, 20% said it is the same as medical tourism, and 20% said it is the same as wellness tourism.

When asked to define *health tourism* in their own words, spa industry survey respondents provided the following responses:



Given the difficulties that already exist in defining *medical tourism* and *wellness tourism*, it is perhaps inadvisable to throw a third term into the mix – especially from a consumer's perspective. Considering the widely divergent stakeholder views on what *health tourism* is, this study will not attempt to provide a standardized definition for this term at the present time. From a research/analysis-based perspective, the term *health tourism* is probably best used as an umbrella phrase to capture both the medical tourism and wellness tourism markets. But from a promotional perspective, the authors of this report would suggest that caution should be used with the term *health tourism*, since its meaning can be ambiguous and may cause additional consumer confusion.

Establishing a Common Definition of *Medical Tourism* and *Wellness Tourism* for the Global Spa Industry

The beginning of this section presented very basic definitions for both medical tourism and wellness tourism: *medical tourism* is undertaken by people who are sick (or who have some kind of ailment/condition); *wellness tourism* is undertaken by people who are healthy (or who are “well”). Based on the varied definitions presented above (and based on the extensive research and interviews conducted for this study), we can now present a richer description of what *medical tourism* and *wellness tourism* are all about.

A More Detailed Description of <i>Medical Tourism</i> and <i>Wellness Tourism</i>		
Medical Tourism		Wellness Tourism
Traveler Characteristics		
Sick person	Who is traveling?	Healthy or “well” person
Treat a specific disease, condition or ailment, and to access: <ul style="list-style-type: none"> • Lower cost medical care? • Higher quality medical care? • Different medical care? Treatment may be medically required	What is the person’s motivation for travel?	<ul style="list-style-type: none"> • Proactive interest in maintaining or enhancing health / wellness / well-being? • Access to different, authentic, or location-based offerings not available at home? • Seeking to practice a certain lifestyle? Participation is voluntary
Destination Characteristics		
Within own country? Different country?	Where is the person traveling to?	Within own country? Different country?
Hospital? Clinic? Medical spa? Only a site with a trained doctor or medical personnel?	What specific places is the person visiting?	Spa? Resort? Wellness center? Retreat? Ashram? Thermal/mineral bath? Cruise?
<ul style="list-style-type: none"> • Surgery or medical intervention? • Elective surgery or treatment? • Cosmetic/plastic surgery? • Dentistry? • Fertility treatments? • Other health-enhancing services (e.g., massage, acupuncture)? • Other non-medical tourism experiences (e.g., spa, beach, safari, sightseeing)? 	What activities, experiences, services, or products is the person interested in?	<ul style="list-style-type: none"> • Wellness/health-enhancing treatments (e.g., massage) ? • Fitness/exercise? • Relaxation/retreat/rejuvenation? • Pampering/beauty? • Meditation, yoga, or other mind-body-spirit practices? • Preventive care? • Traditional/culturally-based therapies and products? • Water-based therapies?

Note that in the table above we differentiate between two categories of information: 1) **traveler characteristics**, and 2) **destination characteristics**. This distinction is very important, because it is largely the attempt to include both categories in definitions that leads to confusion and ambiguity about terminology. For example, is a person with rheumatoid arthritis (*traveler characteristic*) who travels to participate in a yoga/meditation retreat (*destination characteristic*) a *medical tourist* or a *wellness tourist*? If a healthy person who wants a botox treatment (*traveler characteristic*) visits a medical spa in Asia (*destination characteristic*), is this *medical tourism* or *wellness tourism*?

Defining Tourism Segments and Niche Markets: Traveler Characteristics or Destination Characteristics (or both)?

The distinction (and confusion) between traveler characteristics and destination characteristics is apparent in the definitions used for many other tourism segments and niche markets. For example:

- Two widely used and universally understood tourism segments – “leisure tourism” and “business tourism” – are defined solely by traveler characteristics and motivations. Even if a business traveler visits a spa and goes sightseeing during a work-related trip, we typically do not question whether the person is “really” a business tourist.
- Some newer tourism niche markets also use definitions that focus on traveler motivations. For example, “culinary tourism” is typically defined as travel to “pursue unique and memorable culinary experiences”¹⁸ (which describes what the traveler is seeking, rather than where the traveler goes and what he/she does there – and the concept of “unique and memorable” is certainly open to wide interpretation).
- Other tourism niche markets are defined more by the destination’s characteristics. For example, “heritage tourism” has been defined as “traveling to experience the places and activities that authentically represent the stories and people of the past and present”¹⁹ – a definition that is more about the kind of place visited or activities pursued (those that “authentically represent stories/people of the past and present”), rather than the characteristics of the traveler himself/herself.
- Still other tourism niche markets – such as “ecotourism” – have definitions that combine both the traveler and destination characteristics. The International Ecotourism Society defines ecotourism as “Responsible travel to natural areas that conserves the environment and improves the well-being of local people”²⁰ (i.e., the definition focuses both on where the traveler goes – “natural areas” – and on the traveler’s interests and motivations – “conserve the environment and improve well-being of local people”).

¹⁸ See: http://www.culinarytourism.org/?page=whatisct_new.

¹⁹ See: <http://www.culturalheritagetourism.org/howtogetstarted.htm>.

²⁰ See:

[http://www.ecotourism.org/site/c.orLQKXPCLmF/b.4835303/k.BEB9/What is Ecotourism The International Ecotourism Society.htm](http://www.ecotourism.org/site/c.orLQKXPCLmF/b.4835303/k.BEB9/What%20is%20Ecotourism%20-%20The%20International%20Ecotourism%20Society.htm).

Based on the analysis and information presented above, this study presents the following suggestions (for the consideration of the spa industry) about defining *medical tourism* and *wellness tourism*:

- 1) Definitions for *medical tourism* and *wellness tourism* should focus on the traveler characteristics and motivations alone, and not the destination characteristics.** This approach will provide a great deal of flexibility for the industry in developing and expanding the markets for both sectors.

For example, in current practice, *medical tourism* tends to be almost exclusively associated with conventional medical interventions (e.g., surgery). However, there is growing interest in many countries toward integrating and accepting other alternative/complementary health modalities as part of medical tourism offerings – for example, providing medical tourists with a more integrated package of services that includes authentic local therapies/products, spa-based treatments such as massage, or a longer-term recuperation period that includes a stay at a unique wellness center or resort. As the medical tourism market becomes more competitive and as new countries enter as players in this market, this approach is likely to become more prevalent (or even necessary), as destinations will need to differentiate their offerings based on factors other than cost and quality alone. Therefore, if we espouse a definition of *medical tourism* that focuses on the characteristics and motivations of the traveler (and not on where the traveler goes or what he/she does), then we will have a definition with the flexibility to encompass the expanding and changing modalities and offerings related to medical tourism.

Segmenting the market according to traveler intent or motivation (and not destination or activity) also allows us to differentiate between “true” wellness tourists (e.g., a person who visits a spa resort with the intent of actively engaging in a program of health-enhancing activities, such as exercise, change in eating habits, yoga, meditation, and massage) versus leisure tourists who may dabble in wellness (e.g., a person who visits a resort solely to sit on the beach and drink cocktails, and who may get a massage one time during the trip).

- 2) Following from the points made above, it is important to embrace **broad and inclusive definitions for both *medical tourism* and *wellness tourism***.** Contrary to popular opinion in the spa industry, *medical tourism* is not just about surgery (and there is a role for spas in this market). In addition, *wellness tourism* is not just about spas. Both sectors increasingly include varied offerings that range from “generic” or conventional services/treatments/experiences (e.g., a surgical procedure in a hospital, or a basic facial treatment in a spa) to “location-based” services/treatments/experiences that are indelibly linked to the local culture and history (e.g., a medical treatment based on Chinese traditional medicine and using local ingredients, or a rejuvenating meditation and yoga retreat set in a historic ashram in India). This concept is discussed in greater detail in the “Promotion” section of this report.

- 3) The spa industry also needs to recognize that ***medical tourism* and *wellness tourism* are done not only by international tourists, but equally or more so by intra-regional and domestic travelers.** Conventional thinking about these markets tends to focus only on cross-border travel, and especially on travel by “wealthy” people to less-developed countries (e.g., a traveler going from the U.S. to Thailand for a lower cost knee replacement, or a traveler going from Europe to India for a yoga retreat). The reality is that both *medical tourism* and *wellness tourism* often involve people traveling within their own country or within their own region of the world – and these could potentially be lucrative markets to develop. For example, the primary source of medical tourists in Jordan is other Middle Eastern countries (where medical services are less available or of lower quality); the same happens within Asia (e.g., Indonesia is a major source market of medical tourism for other Asian countries). In some countries (e.g., Hungary, Canada), *medical tourism* and *wellness tourism* are currently dominated by the domestic market (or by travelers from nearby countries) and are not well-developed for international travelers. Although there are no statistics to verify this assertion, it is likely that intra-regional and domestic travel may be a much more significant part of the medical and wellness tourism markets in many countries (in terms of tourist numbers) than long-haul international travel.
- 4) We suggest that the spa industry consider adopting the following definitions for *medical tourism* and *wellness tourism*:

Medical Tourism	Wellness Tourism
<p>Medical tourism involves people who travel to a different place to receive treatment for a disease, an ailment, or a condition, or to undergo a cosmetic procedure, and who are seeking lower cost of care, higher quality of care, better access to care or different care than what they could receive at home.</p>	<p>Wellness tourism involves people who travel to a different place to proactively pursue activities that maintain or enhance their personal health and wellbeing, and who are seeking unique, authentic or location-based experiences/therapies not available at home.</p>
<p>Medical tourist: Generally ill or seeking cosmetic/dental surgical procedures or enhancements.</p>	<p>Wellness tourist: Generally seeking integrated wellness and prevention approaches to improve their health/quality of life.</p>

B. Data

Key Challenges in Collecting *Medical Tourism* and *Wellness Tourism* Data

Statistical data on medical tourism and wellness tourism is practically nonexistent – and especially data from reliable sources that can be compared across countries and regions. This lack of data is not unique to the medical tourism and wellness tourism sectors, and is a common challenge across almost every niche tourism market. A number of reasons can be cited for the lack of reliable, widely available data:

- 1) Both medical tourism and wellness tourism are relatively new sectors in most countries around the world (as are many other niche tourism sectors), and governments have not yet had the time to establish the necessary mechanisms and structures to collect such data in a regular and reliable fashion (and may not even have the resources available to do so). In addition, existing country-level data collection mechanisms for tourism-related data are typically entirely separate from the data collection mechanisms in place for medical data, since these sectors are in most respects unrelated (outside of the medical/wellness tourism markets). Therefore, it can be challenging at the present time to get the government entities involved in these efforts to share information and data, much less to coordinate on a more integrated approach for collecting medical and wellness tourism-related data.
- 2) Even if the necessary data-collection mechanisms are in place, it is impossible to “measure” and collect data for something that is not well-defined. This challenge relates directly to the definitional issues described in the previous section of this report.
 - Current data collection efforts for medical tourism tend to rely on an “activity-focused” or “destination-focused” definition – e.g., counting the number of tourists who stay in a hospital, or counting the number of surgeries/treatments performed on international travelers. Sometimes these statistics count only activities in accredited hospitals and clinics, which may help provide focus for data collection efforts (since foreign medical tourists are more likely to visit accredited facilities), but may also miss medical tourism activities taking place in non-accredited hospitals or other facilities (such as medical spas). On the other hand, it is also easy to overinflate medical tourism data through this approach, since “true” medical tourists cannot be separated from foreign tourists who are incidental visitors to a hospital due to an accident while traveling.
 - An “activity-focused” or “destination-focused” definition does not work well when collecting wellness tourism data. For example, if we attempt to measure wellness tourism by counting the number of tourists who visit a spa during their trip, it is impossible to distinguish a “true” wellness tourist (i.e., one who is in the country for the primary purpose of wellness-related activities) from a tourist who is on a leisure or business holiday and happened to visit a spa once during their trip. Focusing on traveler motivations is a much more effective

approach for measuring wellness tourism (and this approach is more widely used in general tourism statistics and data collection efforts), but this kind of data relies on visitor surveys that are resource-intensive and difficult to administer reliably and regularly. An additional challenge with visitor survey data that asks about traveler motivations is that people may not always be open or honest about their motivations for visiting a destination (e.g., they may not want to admit that they are traveling to receive botox or a cosmetic surgery procedure).

- 3) Data collection challenges are heightened in very large countries where government, medical, and tourism-related entities are fragmented across the national and state/provincial levels (e.g., India, Canada, United States). If data collection efforts take place at the state/provincial level, it can be difficult to capture consistent national-level data.

A Review of Currently Available Data

Generally speaking, medical tourism data is more widely available than wellness tourism data, largely because: 1) many governments are keen to put their countries on the medical tourism map (because it is viewed as a lucrative business); 2) medical tourism is easier to define and measure than wellness tourism (if its scope is limited to foreign patients visiting hospitals/clinics for conventional medical procedures); and 3) medical tourism is more organized, structured, and regulated than wellness tourism.

The data that does exist tends to come from a couple of sources:

- One-off studies or estimates produced by national government organizations, industry associations, or country-specific research organizations.
- Independent reports and studies produced by industry analysts, researchers, and consultants.

There are pros and cons to the estimates produced from both sources, but in general the data availability and reliability are spotty at best. The sections below provide a sample of some of the data and indicators that are currently available for both the medical tourism and wellness tourism markets, and also provide a flavor for the problems associated with the available figures.

Global Market Data

Medical Tourism. Among the most widely available and frequently cited estimates of the medical tourism market are two studies produced by major international consulting firms, McKinsey and Deloitte. A 2008 study by McKinsey estimated the **global** medical tourist number to be between 60,000 to 85,000 “inpatient” medical travelers annually.²¹ McKinsey’s estimates have been widely questioned and criticized by the medical tourism industry as being far too low²²; and if we accept as accurate some of the country-specific estimates presented in the section below, McKinsey’s estimates are most likely a gross underestimate. A 2008 study published by Deloitte suggested much higher figures, estimating that 750,000 **Americans** traveled abroad for medical care in 2007, and projecting that this figure would increase to 1 million by 2010.²³ A 2009 update of the Deloitte study provided “recession-adjusted” forecasts that estimated 648,000 outbound U.S. medical tourists in 2009 and projected growth to 1.6 million by 2010.²⁴

Wellness Tourism. There is no global market data on the number of wellness tourists – probably because this sector is so impossible to define. The closest data available is an estimate for the number of “spa trips,” produced by a 2008 study from SRI International and the Global Spa Summit. The SRI/GSS report estimated that there were 17.6 million international spa trips in 2007, with an additional 124.2 million domestic spa trips.²⁵

An additional source of market estimates on medical tourism and wellness tourism is the 2010 SRI/GSS study on the global wellness market, which provided a rough estimation of the overall global market value (or revenues) for the two sectors. This study put the global *medical tourism* market at US\$50 billion annually and the global *wellness tourism* market at US\$106 billion annually.²⁶ It is notable here that the estimated market size for wellness tourism is *more than double* that for medical tourism (in particular, note that medical tourism has in the past garnered more

²¹ T. Ehrbeck, C. Guevara, & P.D. Mango, “Mapping the Market for Medical Travel,” *The McKinsey Quarterly*, May 2008, http://www.mckinseyquarterly.com/Mapping_the_market_for_travel_2134.

²² For a rigorous and in-depth evaluation of McKinsey’s estimates and data collection techniques, see the following article from the *International Medical Travel Journal* (<http://www.imtj.com/articles/2009/mckinsey-wrong-medical-travel/>) and the following article from *Medical Tourism Magazine* (<http://www.medicaltourismmag.com/article/something-to-sink-your-teeth-into-or-not.html>). Also see the following article (from *IMTJ*) exploring some of the inconsistencies in medical tourist data (<http://www.imtj.com/articles/2009/how-many-americans-go-abroad-for-treatment-30016/>).

²³ Paul Keckley and Howard Underwood, *Medical Tourism: Consumers in Search of Value*, Deloitte, 2008, [http://www.deloitte.com/assets/Dcom-Croatia/Local%20Assets/Documents/hr_Medical_tourism\(3\).pdf](http://www.deloitte.com/assets/Dcom-Croatia/Local%20Assets/Documents/hr_Medical_tourism(3).pdf).

²⁴ Paul Keckley and Howard Underwood, *Medical Tourism: Update and Implications*, Deloitte, 2009, http://www.deloitte.com/assets/Dcom-UnitedStates/Local%20Assets/Documents/us_chs_MedicalTourism_111209_web.pdf.

²⁵ Global Spa Summit and SRI International, *The Global Spa Economy 2007*, 2008, p. 35-36, <http://www.globalspasummit.org/images/stories/pdf/gss.spa.economy.report.2008.pdf>. “Spa trips” in this report are defined as “a trip of at least one night’s duration, either within or outside of a person’s country of residence, in which the person’s motivation for the trip includes the enjoyment of spa services or treatments.”

²⁶ These figures are rough, “best guess” estimates produced by SRI using economic estimation techniques and are not based on primary data collection. The medical tourism figure was determined by extrapolating and adjusting data from a number of other industry studies available on the topic. The wellness tourism figure was drawn from the 2008 SRI/GSS *Global Spa Economy* study and focused primarily on spa-related tourism (in a very broad sense) – so it is possible that this estimate could be even higher if broadened to include an even wider definition of wellness tourism. For more information see the source referenced in the footnote above.

attention from governments and has typically been viewed as a more lucrative opportunity, while wellness tourism is only recently “on the radar screen” for governments and others in the tourism industry).

It is not within the scope of this study to provide an in-depth evaluation of McKinsey’s, Deloitte’s, or other analysts’ estimation techniques, but suffice it to say, there are no “great” estimates available at this time. From these studies alone, we can see the disparity of data – with the number of medical tourists ranging from 60,000 globally to around 700,000 from the U.S. alone, and the number of international spa tourists topping 17 million. The variations in these estimates can partially be attributed to wide differences in definitional approaches, but the “true” figures for these markets may be far higher or lower, or may lie somewhere in between.

Country-Level Data

The tables on the following two pages present a sample of the kinds of country-level data that are available for medical tourism and wellness tourism in the 12 countries studied in this report. The statistics cited below are drawn from a wide variety of sources (government sources, independent studies and researchers, quotes in online articles); they are not intended to provide an exhaustive list of statistics, but rather a sampling of the kinds of data currently available. In general, only statistics for which a specific source or a clear citation can be traced are included in these tables (or, at minimum, a web link is provided for most data points if a specific citation is not available). As can be seen from these data tables, the data availability is inconsistent, the sources are frequently unclear, the definitions behind these statistics are usually unavailable, and the data cannot be directly compared across different countries.

Selected Country-Level Statistics on <i>Medical Tourism</i>			
Country	Statistic	Year	Source
Australia	7,000 international inbound medical tourists annually	2006-2008	Australia's Sustainable Tourism Cooperative Research Centre ²⁷
	1 million total medical tourists annually (intl. and domestic)	??	Government sources, cited in an <i>IMTJ</i> article ²⁸
Austria	N/A		
Brazil	180,000 medical tourists	2009	Statistics quoted in a number of online articles, supposedly based on local industry estimates ²⁹
Canada	N/A		
Hungary	300,000 international visits to "medical hotels"	2009	Hungarian government sources
India	500,000 international healthcare visitors	2006	EximBank India ³⁰
	150,000 international medical tourists	2005	Confederation of Indian Industry and McKinsey ³¹
Indonesia	N/A		
Jordan	250,000 international medical tourists	2007	ABC Investments, Jordan ³²
	220,000 international medical tourists	2009	Jordan Enterprise Development Corporation ³³
Morocco	N/A		
Philippines	100,000 international medical tourists	2008	Philippines Department of Tourism ³⁴
South Africa	410,000 international medical tourists	2008	South Africa Department of Tourism ³⁵
Thailand	600,000+ international medical tourists	2003	Harvard Business School Case Study ³⁶
	1 million – 1.5 million medical tourists	??	Statistics quoted in a number of online articles, source unknown

²⁷ See: <http://www.crctourism.com.au/wms/upload/Resources/120002%20Health%20Tourism%20In%20Australia%20WEB.pdf>

²⁸ See: <http://www.imtjonline.com/news/?EntryId82=209423>

²⁹ See: <http://www.imtj.com/news/?EntryId82=249230>

³⁰ See: <http://www.eximbankindia.com/ht/Exe%20Summary.pdf>

³¹ See <http://heapol.oxfordjournals.org/content/25/3/248.extract>

³² See: http://www.abci.com.io/cms_files/Tourism_Sector_Report_-_January_2009.pdf

³³ See: <http://www.imtjonline.com/news/?EntryId82=178706>

³⁴ See: <http://www.mb.com.ph/articles/250136/medical-travel-the-next-big-thing>

³⁵ See: http://www.medioclubsouthafrica.com/index.php?option=com_content&view=article&id=1274:sa-medical-tourism-060809&catid=50:visitnews&Itemid=117

³⁶ See: http://www.isc.hbs.edu/pdf/Student_Projects/Thailand_Medical_Tourism_2006.pdf

Selected Country-Level Statistics on <i>Wellness Tourism</i>			
Country	Statistic	Year	Source
Australia	152,000 international tourists visited a “health spa” annually	2006-2008	Australia’s Sustainable Tourism Cooperative Research Centre ³⁷
Austria	3.5 million wellness visitors annually	??	Austria’s national investment promotion company (ABA) ³⁸
Brazil	N/A		
Canada	16.1 million spa visitors	2006	Mintel International Group
Hungary	150,000 international visits to “wellness hotels”	2009	Hungarian government sources
India	N/A		
Indonesia	2.5 million spa tourist arrivals	2009	Statistic cited in Euromonitor Global Research Blog, source unknown ³⁹
Jordan	N/A		
Morocco	N/A		
Philippines	N/A		
South Africa	N/A		
Thailand	3.6 million spa visitors	2009	Intelligent Spas

³⁷ See: <http://www.crctourism.com.au/wms/upload/Resources/120002%20Health%20Tourism%20In%20Australia%20WEB.pdf>.

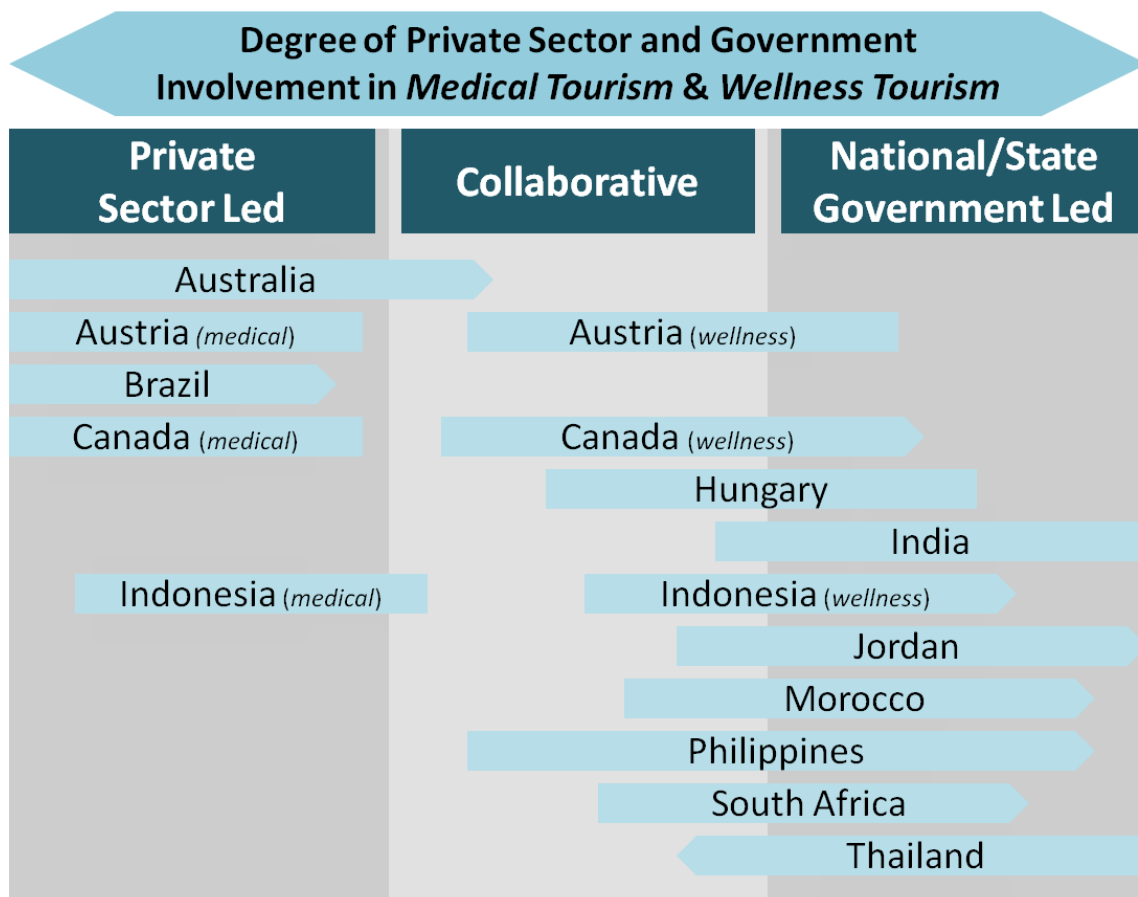
³⁸ See: http://www.aba.gv.at/uploads/ABA_Tourism_Austria_2010_10703_EN.pdf.

³⁹ See: <http://blog.euromonitor.com/2011/01/spa-tourism-is-big-business-in-asia-pacific.html>.

C. Organizational Structures

Organizational structures for developing, supporting, and promoting medical tourism and wellness tourism vary from country to country, and they tend to be closely linked with the overall governing structure that exists in each country (e.g., centralized national government versus federal/state system, etc.). Organizational structures also tend to parallel those used by the country for tourism sector promotion/development in general, and are not usually specific to the wellness and medical tourism sectors. In general, it can be said that governments in developing countries typically play a much more active role in guiding, supporting, and promoting the tourism sector, while in developed countries, tourism sector development and promotion are typically more private sector-driven or collaborative in nature.

The diagram below characterizes the organizational structures of the 12 countries covered as case studies in this report. Countries with right-pointing arrows are those where the role of the government has been increasing in recent years, while countries with left-pointing arrow are increasingly collaborative. In general, government attention to and involvement in both medical tourism and wellness tourism have been increasing in most countries around the world, and collaborative efforts across the public and private sectors have also been growing.



Note that this graphic is the study team’s subjective interpretation of the approach used in each of these countries, based on the research and interviews conducted in the 12 countries; others’ interpretations of this topic may vary.

- The countries with the most well-developed medical tourism and/or wellness tourism sectors and brand images (e.g., India, Thailand, Jordan) also tend to be those where the national government has already established itself as a leading player in promoting these sectors. In these countries, promotional efforts are typically led by the national tourism board or national ministry of tourism. The ministry of health is also sometimes involved in medical tourism development, since its role is typically to oversee and develop the medical sector in general.
- In a number of other countries, the national government has only recently identified medical tourism and/or wellness tourism as opportunities, and is currently playing only a small (but often increasing) role in sectoral development and promotion (e.g., Australia, Canada, Brazil). In these countries, the medical tourism and wellness tourism sector developments in recent years have been almost exclusively private sector-driven, or supported by collaborative organizations. In countries such as Canada and Australia, state/provincial-level tourism organizations may have had some focus on wellness tourism, but these efforts are generally fragmented and have not led to a national-level brand or reputation.
- In the past medical tourism has typically been more actively supported and promoted by governments than wellness tourism (possibly because medical tourism has had a growing international profile in recent years, is easier to define, and is often seen as more “lucrative” by governments than wellness tourism; also because wellness tourism is a newer concept). In a number of countries, government attention has been so focused on medical tourism that additional lobbying may be needed to raise the profile of wellness tourism and garner more government support for this sector (e.g., places such as India, Jordan, Thailand). In a few countries, however, recent government attention and support has been more focused on wellness tourism developments than medical tourism (e.g., Austria, Canada, Indonesia) – possibly because these countries recognize that they have more assets to develop wellness-related offerings and do not feel that they can compete in the medical tourism market.
- Most countries that are working on promoting wellness tourism (and spa-related tourism) now have spa/wellness associations, which provide greater strength and lobbying power to industry members. Many of these associations are relatively new in the countries covered in this report – launched within the last few years – and they vary in the degree to which they are cooperating with the national government on industry development and promotion. Typical areas of focus for spa/wellness associations include: education and training, regulation, accreditation and quality standards, and marketing. In all countries, there is still significant room for improvement across all of these issues, and spa/wellness associations can (and should) continue to play an active and increasing role.

- A few countries with well-developed medical tourism markets (e.g., Thailand, Jordan) have also developed official industry cluster organizations, networks, or collaborative bodies that bring together all of the key players in the market from the public and private sectors. These kinds of networks can be very effective at supporting collaboration and communication (especially as compared to countries that have more fragmented, ad hoc systems of collaboration).

D. Promotion and Development

As compared to other tourism segments, medical tourism and wellness tourism are a relatively new focus for most countries around the world. Among the 12 countries studied in this report:

- Approximately half of the countries have been developing and promoting medical tourism and/or wellness tourism for at least 5-10 years (or longer) – including Austria, Hungary, India, Jordan, Morocco, and Thailand.
- About half of the countries have only started focusing on medical tourism and/or wellness tourism within the last five years (or even within the last year or two) – including Australia, Brazil, Canada, Indonesia, Philippines, and South Africa.

The sections below provide an overview of some of the key trends and developments in medical tourism and wellness tourism promotion at the country level, focusing primarily on the 12 countries covered as case studies in this report.

Promotion and Marketing Approaches for *Medical Tourism and Wellness Tourism*

The promotional approaches used by countries to market medical tourism and wellness tourism vary significantly across the two sectors. If we use the web presence or national tourism website of individual countries as indicative of their promotional approaches for medical tourism and wellness tourism, several trends emerge (as indicated in the table on the next page). In general, wellness tourism tends to be much more heavily promoted as a major national tourism “product” than medical tourism.

These differences are largely due to the different characteristics of the two markets, in terms of how tourists learn about the country’s offerings and how they arrange their trips.

- Medical tourism is very much dominated by the medical tourism facilitator model (e.g., companies that serve as a middleman or travel agency for medical tourists, arranging the package of medical services, accommodation, and transportation; arranging for visas and paperwork; providing in-country support; and so on). Alternately, medical tourists may initially have direct contact with a medical provider or doctor they are interested in working with, but even then they would typically be referred to a facilitator or travel agent who can assist with the arrangements.

Given this reality (and given the specialized nature of medical tourism), a more typical promotion and marketing approach for medical tourism is for a country to work on reaching potential tourists through medical tourism facilitators, rather than engaging in direct online promotion and positioning through typical tourism promotion channels. Although, arguably, having a dedicated national medical tourism website (separate from the national tourism

website – like that of India or Thailand) is an effective means of promoting the country's specialized offerings and communicating the “right” consumer segments online.

Additionally, much of the promotion and marketing for medical tourism tends to be driven by the private sector (e.g., the medical providers and medical tourism facilitators doing their own marketing to potential patients, rather than working through the government's tourism promotion agency). This is especially the case in countries where medical tourism has been growing for many years, but has only recently been recognized by the government as a key target sector (e.g., Brazil, South Africa).

- Wellness tourism is typically promoted in a similar fashion to other niche tourism segments (e.g., sports/adventure tourism, culinary tourism, cultural/historical tourism, etc.) – it is one among many specialized offerings that the country lists on its national tourism website or in other promotional materials. The promotional materials examined for the countries studied in this report reveal that, in practice, wellness tourism promotion tends to be very much dominated by spas (even if the country possesses many other wellness-related offerings). The degree of emphasis on unique/local offerings and traditions varies from country-to-country and seems to be increasing over time.

In general, the more successful countries in medical tourism and wellness tourism seem to be those where the national government has taken an active role in supporting these sectors and has actively promoted these forms of tourism. This promotion most typically takes place through the auspices of the national tourism board or national ministry of tourism, and sometimes through state-/regional-level tourism promotion organizations (although the ministry of health is also sometimes involved in the medical tourism sector). Countries where the national government has only recently started paying attention to and actively promoting these sectors (e.g., Australia, Brazil, Indonesia) are playing catch-up in terms of attracting significant numbers of tourists in these markets.

Selected Countries' Online Marketing Approaches for *Medical Tourism*

- Five of the 12 countries studied in this report mention *medical tourism* among a list of “Activities” or “Things to Do” on their national tourism websites:
 - Hungary (<http://www.spasinhungary.com/medical-tourism>)
 - India (<http://www.incredibleindia.org/Resource-Directory.html>) and (http://india.gov.in/overseas/visit_india/medical_india.php)
 - Philippines (<http://www.experiencephilippines.org/medical-tourism/>)
 - Thailand (<http://www.tourismthailand.org/see-do/activities/medical-tourism/>)
 - Bali (<http://www.bali-tourism-board.com/bali-medical.html>) – note that this is a regional tourist board website, not countrywide
- Only three of the 12 countries studied in this report have a dedicated national promotion website for *medical tourism*:
 - India (<http://indiameditourism.com/>)
 - Philippines (<http://philippinemedicaltourism.info/>)
 - Thailand (<http://www.thailandmedtourism.com/>)
- Many countries that are promoting *medical tourism* – even countries that are considered to be leading players in the market – do not promote or even mention *medical tourism* on their national tourism website or in their government-sponsored promotional materials.

Selected Countries' Online Marketing Approaches for *Wellness Tourism*

- Most of the countries studied for this report promote *wellness tourism* on their national tourism websites. The wording varies from country to country, but most use a label such as “Health & Wellness,” “Spas & Wellness,” “Health & Wellbeing,” or “Rejuvenation”:
 - Austria: “Rejuvenation” (<http://www.austria.info/us/rejuvenation>)
 - Canada: “Spa & Wellness” (<http://uscw.canada.travel/ConsumerWeb/ThingsToDoGallery.page?searchContentTypeClassName=Experience>)
 - Hungary: “Spa & Wellness” (<http://www.hungary.com/spa-wellness>)
 - India: “Wellness” (http://www.incredibleindia.org/newsite/cms_page.asp?pageid=492)
 - Indonesia: “Body & Soul / Spas” (<http://www.indonesia.travel/en/activity/detail/65>)
 - Jordan: “Leisure & Wellness” (http://www.visitjordan.com/visitjordan_cms/ExploreJordan/LeisureWellness/tabid/73/Default.aspx)
 - Morocco: “Health & Well-Being” (<http://www.visitmorocco.com/index.php/eng/I-enjoy/Health-and-well-being/A-paradise-of-well-being>)
 - Philippines: “Health & Wellness” (<http://www.experiencephilippines.org/health-wellness-tourism/>)
 - South Africa: “The Urban Vibe / Health & Wellness” (<http://www.southafrica.net/sat/content/en/us/us-health-and-wellness>)
 - Thailand: “Spa & Wellness” (<http://www.tourismthailand.org/what-to-see-do/activities/spa-and-wellness/>)
- Note that all of the countries listed above promote spas as a key part of their *wellness tourism* offerings (although on their websites, Morocco, Philippines, and South Africa do not list spas as prominently and tend to place more emphasis on indigenous/local offerings).
- Only Hungary has a dedicated national website for wellness tourism (and spas) (<http://www.spasinhungary.com/>). In addition, only Hungary lists “spas and wellness” in a prominent position on the front page of its national tourism website (whereas other countries tend to list it as a subsection under the heading “Activities” or “Things to Do”).
- Countries that do not specifically promote *wellness tourism* (or spas) on their national tourism websites include: Australia and Brazil.

Product Development, Differentiation, and Positioning

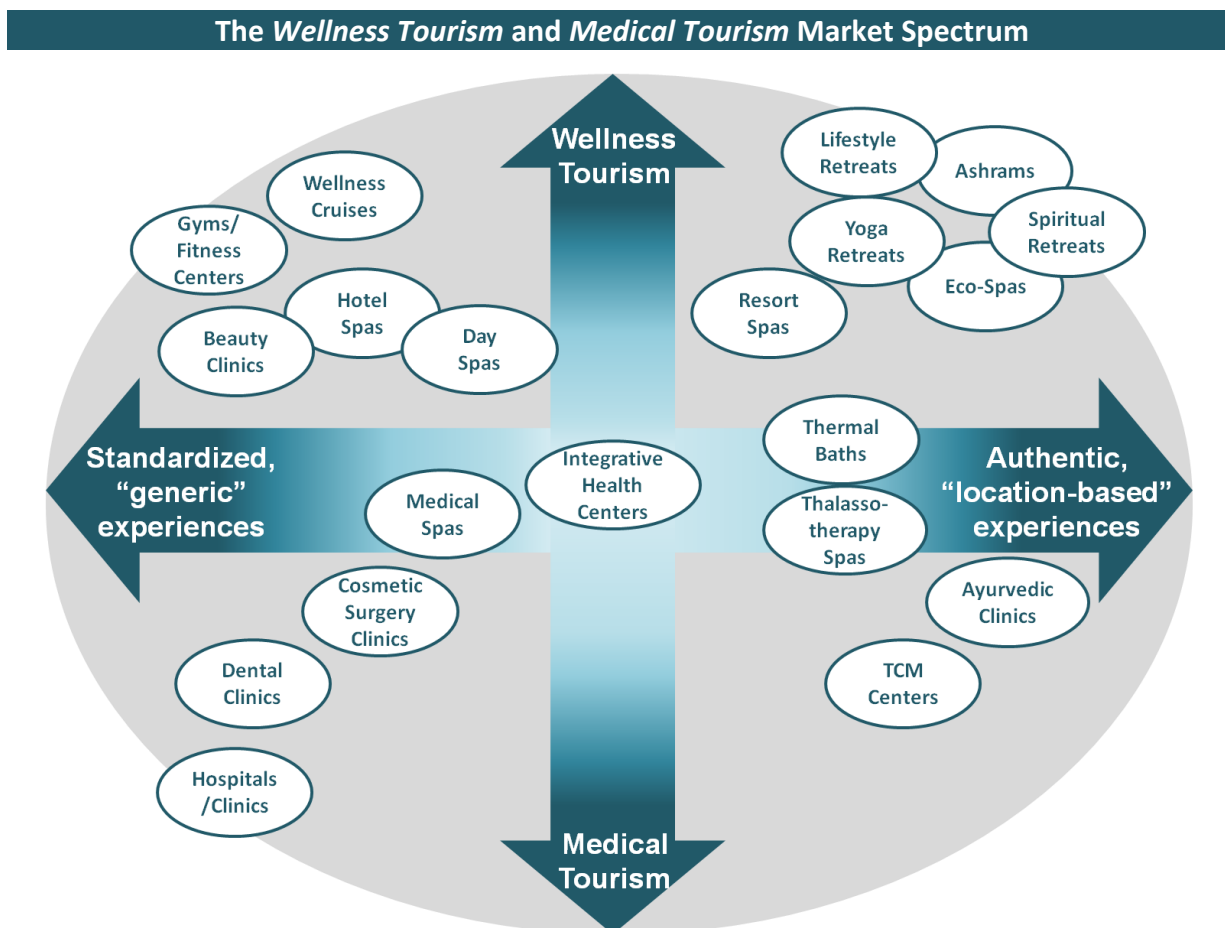
Few (or even possibly none) of the countries studied in this report have developed a strong and unique brand image for either medical tourism or wellness tourism. A handful of countries are emerging as major spa and wellness destinations (e.g., Thailand, Bali/Indonesia), driven largely by growth and promotion of high-end luxury resort spas and destination spas. Probably the strongest positioning is coming from some of the leading medical tourism countries (especially in Asia, such as India, Thailand), which are promoting themselves as low-cost and high-quality destinations for surgery, cosmetic surgery, or other hospital-based treatments and medical interventions. In these locations, medical tourism is dominated by internationally-accredited, Western-style hospitals and clinics that have few to no linkages with the country's own culture and traditions. In many cases, international medical tourists actually seek out an experience that is as much like home and least like the country being visited as possible (e.g., Western-trained medical staff, world-class facilities/technologies, no waiting lists, English language skills).

However, as mentioned previously, medical tourism is not just about surgery, and wellness tourism is not just about spas. Both sectors have the potential to encompass a wide array of offerings that can include on the one-hand "generic" or conventional services or experiences, and on the other hand unique "location-specific" services or experiences that spin out of the country's special traditions and natural assets. This range of experiences – from the "generic" to the "location specific" – can easily be envisioned on a continuum (as illustrated by several examples in the diagram below). This continuum can apply to both medical tourism and wellness tourism offerings.

Continuum of *Wellness Tourism* and *Medical Tourism* Offerings

	Standardized/"Generic" Offerings	Authentic/"Location-Based" Offerings
Wellness Tourism	<ul style="list-style-type: none"> • Basic facial treatment or massage in a day spa • Weekend yoga retreat at a hotel spa in New York City 	<ul style="list-style-type: none"> • Rejuvenating meditation and yoga retreat set in a historic ashram in India • Alpine spa visit and hydrotherapy in a beautiful mountain setting in Austria
Medical Tourism	<ul style="list-style-type: none"> • Cardiac surgery in a hospital • Cosmetic procedure at a medical spa 	<ul style="list-style-type: none"> • Specialized medical treatment based on Chinese traditional medicine and using local ingredients • Post-surgery recuperation in a wellness retreat set near the beach in the Philippines, with healing treatments based on local herbal remedies

Drawing on the continuum concept, we can then develop a model of the key experiences, facilities, and products/services that are currently being promoted and developed within the medical tourism and wellness tourism markets, as shown in the diagram below:



In spite of the immense wealth of indigenous, traditional, and natural-asset-based wellness and healing traditions in virtually all of the countries assessed in this study, arguably none of them has effectively developed a national brand image for medical tourism or wellness tourism that is based on unique, location-based offerings. There is some movement in this direction. In a few countries (notably, Morocco, Indonesia, South Africa, Philippines, Austria, Hungary) the government is taking a more proactive effort to develop and promote unique local offerings as part of its medical and/or wellness tourism product. In general, however, most countries' offerings and brand images are fairly well developed on the left-hand side of the continuum, but are weak or only emerging on the right-hand side of the continuum.

As the medical tourism and wellness tourism markets become more crowded and competitive, it will become increasingly important for countries to differentiate themselves based on factors other than cost and quality alone:

- Stakeholders in both the medical tourism and wellness tourism markets should seek to develop and expand their offerings that fall to the right-hand side of the continuum – the authentic, location-based services, treatments, and experiences that draw directly from unique local traditions and natural assets. In this regard, it is not enough for a spa to simply offer a “traditional” treatment such as Thai massage or Ayurveda in order to move fully to the right-hand side of the continuum, as even these services have become relatively standardized and are increasingly available at hotel spas around the world (and even a Thai massage in a resort in Thailand can be a commoditized experience). Offerings will need to be increasingly location-specific (drawing on the local natural assets and environment) *and* authentic (drawing on local traditions, skills, and ingredients) in order to truly represent a differentiated product.

The difficulty in developing strong medical tourism offerings that are closely linked with local culture and traditions may partially be linked to the broader issue of the lack of acceptance of traditional and complementary medicine (TCM) by the conventional medical community. As acceptance of TCM grows (and this is, in fact, occurring – especially as the evidence-base for the effectiveness of such treatments grows), opportunities for developing “authentic” and “locally-based” medical tourism offerings may also grow.

- Even for services and products that fall to the left-hand side of the continuum, stakeholders in both the wellness tourism and medical tourism markets can seek to differentiate their offerings by identifying and promoting treatments and procedures in which they have a well-developed and recognized area of specialization and strength. For example, in promotional materials for medical tourism, it is very typical for a country to provide a “laundry list” of all of the procedures and treatments that a tourist could conceivably receive in their country, rather than focusing on a smaller list of procedures that are truly specialties (and highlighting the physicians, facilities, technologies, etc. that support these specialties). This kind of targeted approach could help countries provide a stronger value proposition to potential medical tourists and differentiate their offerings in an increasingly commoditized marketplace (e.g., other than cost differentials, what would make a medical tourist choose Thailand over the Philippines or India for a heart procedure that would involve a one-week stay in hospital and no “local” tourism experience?).

Part II:
Case Studies on
Wellness Tourism and Medical Tourism

Part II: Case Studies on Wellness Tourism and Medical Tourism

This section of the report presents a detailed summary analysis for 12 countries that are leading or emerging players in the medical tourism and wellness tourism markets. The 12 countries included here (Australia, Austria, Brazil, Canada, Hungary, India, Indonesia, Jordan, Morocco, Philippines, South Africa, and Thailand) were selected as case studies because they represent a wide cross-section of approaches to medical tourism and wellness tourism; they are at varying stages of development in these sectors; and they represent a mix of geographic regions around the world. This list of countries is by no means exhaustive, and it does not represent all of the countries that are considered to be current or potential players in the medical tourism and wellness tourism markets. Further details about the selection of the 12 country case studies are provided in the box on the following page.

Each country's case study includes an organizational chart that is designed to represent the way in which the country organizes its development and promotion of medical tourism and wellness tourism, including the main parties/stakeholders involved and the relationships among them. Please note that the organizational charts are meant to be a *representative interpretation* of each country's situation, and they are not intended to be an exhaustive or definitive list of all parties and relationships involved.

The 12 country case studies are followed by a brief analysis and description of a number of other concepts, products, and regional initiatives being developed around the world that are closely linked with medical tourism and wellness tourism, and which are affecting the dynamics and evolution of the medical tourism and wellness tourism markets.

Notes on data used in the country summaries:

- Country population figures are 2011 estimates from the CIA, *World Factbook*, <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2119rank.html>.
- Figures for international tourist arrivals and international tourism receipts are from UNWTO, *Tourism Highlights – 2010 Edition*, September 2010, http://www.unwto.org/facts/eng/pdf/highlights/UNWTO_Highlights10_en_HR.pdf.

Notes on the Selection of Case Country Studies

The 12 countries included as case studies in this report were carefully selected by the research team to showcase the variety of ways in which countries are looking at (or not looking at) medical tourism and/or wellness tourism, and special effort was made to select countries representing all regions of the world. Further rationale about the selection of each of the 12 countries is provided below.

Australia has much in common with many other Western developed countries (e.g., United Kingdom, United States, as well as much of Europe). Australia's emphasis is mainly on wellness tourism and day spas, and holistic retreats also play an important role. New Zealand follows a similar trend, except that there is perhaps a greater tradition there of using hot springs.

Austria shares many characteristics with other Alpine countries, as it uses its climate, fresh air, mountains, and lakes as an inherent part of its wellness tourism product. Other German-speaking countries, like Germany and Switzerland, are also very advanced in terms of their development of thermal resorts and baths. Facilities and services in these countries are incredibly sophisticated and of a high quality. The emphasis is more on wellness tourism than medical tourism, but the concept of medical wellness is also widespread (i.e., wellness-/lifestyle-based activities prescribed by a medical practitioner).

Brazil was chosen because it is fairly representative of South and Central America, in that there is more emphasis on medical tourism than wellness tourism – and especially on cosmetic surgery, which is also popular among local people in these regions. Although there is growth in the number of spas, countries in this region are tending to focus more on medical tourism at present. However, one interesting trend is the development of adventure spas (which use the dramatic landscapes of Brazil, Argentina, and Chile, for example), as well as eco-spas (which are located in the jungles of countries like Costa Rica and Ecuador).

Canada is somewhat similar to the United States and many northern European countries (especially Nordic countries), as the emphasis is mainly on wellness tourism, with close connections to outdoor recreation and landscape. At present, there is very little medical tourism in Canada. The number of spas is growing, but they are used more by domestic residents rather than foreign tourists.

Hungary is typical of the Central and Eastern European region, as it has a large number of thermal waters with healing or medical properties. Thermal baths (which are sometimes called “spas”) tend to be well-developed in this region, but are often used simultaneously by domestic medical tourists and international wellness tourists (especially in the capital cities). Governments in the former Socialist countries (e.g., Czech Republic, Slovakia, Slovenia, Poland, Romania, Bulgaria, Serbia) still often subsidize domestic medical tourism to thermal baths.

India is one of the oldest countries in terms of wellness tourism and one of the leading countries now in medical tourism. Many Indian traditions are being exported to other countries and are featuring in wellness tourism and medical tourism programs worldwide (e.g., Ayurveda, yoga, meditation). India is also typical of many other Asian countries that understand and practice body-mind-spirit balance and use holistic or integrated medical systems that are also based on lifestyle.

Indonesia is an important country in this study because of its emergent wellness tourism and medical tourism industries. It has significant potential in these markets and is already very well-established as a tourism destination (especially Bali). Indonesia is likely to develop quickly as a spa and wellness tourism destination because of its beautiful landscape and beaches, although if it follows the path of other Asian countries like Thailand or Malaysia, it can also become strong in medical tourism with the right support.

Jordan is somewhat typical of the Middle East in that it mainly focuses on medical tourism and has a relatively long history of high-quality facilities, services, and treatments. However, like Israel, Jordan also has the advantage of a unique resource – the Dead Sea – which is an ideal location for spa hotels and resorts. Since the Dead Sea has some healing properties, even spas in this region can promote medical treatments (e.g., for skin conditions).

Morocco was chosen as an example of an African country that is developing quickly in terms of its wellness tourism and spa industry (especially its hammams and thalassotherapy), and to a lesser extent its medical tourism industry. Tunisia is also developing quickly in this respect. There are perhaps more parallels with Mediterranean destinations than Middle Eastern ones (which tend to focus more on medical tourism), although the hammam tradition is similar.

The **Philippines** is something of a unique case study, although parallels could be drawn with other island destinations such as those in the Caribbean or the South Pacific which have landscapes and resources especially well-suited to spa and wellness tourism. There is also a similar culture of hospitality and a relaxed atmosphere. However, it is also interesting to see how medical tourism can be developed in a wellness tourism destination with enough support from government and other agencies.

South Africa is quite unique in Africa because it has a tradition of hot springs tourism, a burgeoning spa and wellness tourism industry, and high quality medical tourism developments. In terms of landscape and spa developments, it perhaps has more similarities to other countries with a similar geography and climate (e.g., Australia) than to other African countries. However, Kenya is also developing both medical tourism and wellness tourism.

Like India, **Thailand** is very well developed in both medical tourism and wellness tourism. As it is well-established as a tourism destination, many tourists stay in spa hotels and resorts and take advantage of the lovely landscapes, beaches, and cultural activities, as well as enjoying some of the wellness traditions like Thai massage or Buddhist meditation (which have also been globalized in recent years). Other Asian countries have some very different traditions – for example, Traditional Chinese Medicine or Japanese onsen – but these are also becoming popular around the world, and people are starting to want to visit the “home” of these traditions. Korea is focusing heavily on medical tourism, but with some emergent specialties like marine medical tourism (or thalassotherapy).

Australia

Population (2011): 21.8 million

International tourist arrivals (2009): 5.6 million

International tourism receipts (2009): US\$25.6 billion

Profile of Medical & Wellness Tourism

- Australia does not currently promote itself as a medical or wellness tourism destination, and it is a very new player in these markets. The country has only recently (since 2009) started to focus on the opportunities in medical and wellness tourism.
- The wellness tourism that has been occurring in Australia to date has primarily been among domestic travelers (e.g., short break travel to visit a spa).

Medical Tourism Trends

- Australia is not currently a player in the medical tourism market, and there are few suppliers of medical services to international visitors. A 2010 study by Australia’s Sustainable Tourism Cooperative Research Centre estimated that there were only 7,000 international medical tourists to Australia annually during the period 2006-2008.

Wellness Tourism Trends

- Wellness tourism in Australia (which tends to be associated with spas or outdoor/sports activities) is primarily domestic, short break travel. Many Australians increasingly consider an in-country spa retreat to be an attractive and affordable option.
- According to Australia’s Sustainable Tourism Cooperative Research Centre (STCRC), estimates of the number of domestic tourists taking a spa/wellness/health-related holiday ranged from 229,000 to 497,000 annually in 2006-2008 (or 0.3%-1.3% of all domestic tourists).
- Domestic tourists taking wellness/spa-focused trips would likely travel to places like Daylesford/Hepburn Springs in Victoria or towns branded as spa retreats (such as Byron Bay and Palm Cove). More often, domestic travelers might visit a spa as part of their holiday, but it is not the primary focus of their trip.
- Most international tourists to Australia are not primarily motivated by wellness, although some may visit a spa during their trip. Government statistics estimate that 152,000 international tourists annually visited a “health spa” during their trip to Australia (from 2006-2008), and this represents only 3% of all international tourists.
- STCRC estimates that there are around 590 suppliers of “health and wellness tourism” in Australia (including day spas, spa resorts/hotels, lifestyle retreats, and spiritual retreats). Many of these businesses are very new, having been in operation for less than five years.

Where Does Spa Fit?

- There are a large number of day spas in Australia but growing numbers of resort, retreat and destination spas, and many spas have natural thermal water. Destination and resort spas are primarily concentrated in the states of Queensland and Victoria. There is a small but growing number of medical spas. Spa operators are increasingly opening more spas (often with government assistance), and many of these are in urban areas (e.g., spas being fitted into major city hotels).
- Spas do not really have a link to the medical industry at present.
- The Australasian Spa Association (ASPA) created a *Spa Tourism Plan*⁴⁰ for Australia in 2005, with the aim of coordinating activities such as promotion and improving competitiveness. ASPA is not, however, actively involved with the Australian government's recent efforts (described below) to pursue opportunities in medical and wellness tourism.

Government Support & Promotion for Medical & Wellness Tourism

- Until 2009, the Australian government had no official policy supporting or promoting medical tourism or recognizing its importance to the country.
- With the *Tourism Victoria Spa and Wellness Action Plan 2005-2010*⁴¹, Victoria was the first and only state in Australia to actively position itself as a wellness tourism destination.
- In 2009, delegates from the tourism, medical, and government sectors convened at Australia's first Health and Wellbeing Conference in Cairns (sponsored by the Australian Tourism Export Council – ATEC), to hear international experts discuss opportunities available in medical and wellness tourism to Australia. At the end of this conference, the delegates issued the *Cairns Declaration*⁴², outlining Australia's plans to pursue opportunities in the medical tourism sector (and to a lesser extent the wellness tourism sector, including spa treatments, holistic healing services, fitness training, dietary and nutritional services, and spiritual guidance, with an additional emphasis on indigenous traditions).
- ATEC has established a Health and Wellness Advisory Council, which has set a goal "to position Australia as a leading health and wellbeing destination through the promotion of advanced medical services, natural attributes and well-being experiences." Specific activities of this council include:
 - Educating industry and developing inbound "health and wellbeing tourism."
 - Developing a strategic action plan on collaboration, marketing, and business generation.
 - Exploring the potential of launching a national Health & Wellbeing Travel Conference.
 - Soliciting in-depth market research from STCRC on the international "health and wellbeing market."
- ATEC has been lobbying at the international level for international insurers to recognize and accredit Australian health services for tourism purposes.
- Australia's national Department of Resources, Energy, and Tourism has established a number of initiatives (at the national and state levels) which aim to promote spa facilities to tourists. Tourism Australia coordinates most of these programs, but each state in Australia has a tourism authority with representatives who are responsible for spa development and promotion.
- The Australian Government recently put out a tender for a Medical Tourism Scoping Study, run through the Department of Resources Energy and Tourism. This might demonstrate that they are taking medical tourism more seriously.

Key National Websites where Medical and Wellness Tourism are Promoted:

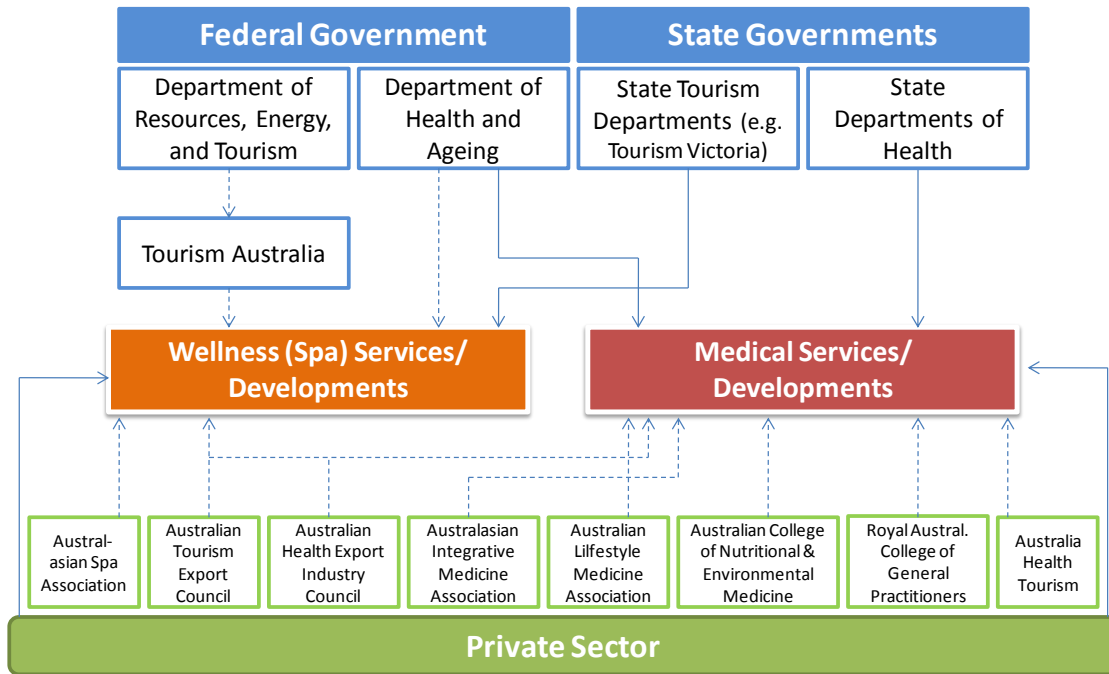
Australia does not currently promote medical or wellness tourism (or spas) on its national tourism website (<http://www.australia.com/>).

⁴⁰ See: <http://www.linkbc.ca/torc/downloads1/SpaAus.pdf>.

⁴¹ See: <http://www.tourism.vic.gov.au/spaandwellness/>.

⁴² See: http://www.atec.net.au/atec_the_cairns_declaration_030909.pdf.

Organizational Structure for Medical & Wellness Tourism – Australia



Legend:
 Direct link (planning, regulation, development) —>
 Consultative link (initiatives, promotion) - - ->

Tourism Australia (falls under the Department of Resources, Energy, and Tourism): Responsible for the international branding and promotion of Australia and Australian Tourism.

Department of Health and Ageing: Involved in conventional medicine, wellness, and preventive medicine. In 2008, DoHA established the National Health & Hospitals Reform Commission, along with a Preventative Health Taskforce.

State Tourism Departments: Role varies, depending on each state’s strategy and resources – may prepare marketing strategies and run marketing activities for various types of tourism (e.g., spa tourism in the State of Victoria).

State Departments of Health: Organization and regulation of each state’s health system.

Australasian Spa Association (ASPA): Aims to foster a coherent and vibrant spa, health, and wellness industry by working together to facilitate dynamic networks and promote awareness, excellence, and sustainability.

Australian Tourism Export Council (ATEC): A member-based organization representing inbound tourism before government and business leaders. Currently leading the efforts to develop medical and wellness tourism in Australia.

Australian Health Export Industry Council (AHEIC): Has started working with the Australian Tourism Export Council (ATEC) to develop medical and wellness tourism.

Australasian Integrative Medicine Association: Independent not for profit organization of individual medical practitioners seeking to provide whole person medical care by integrating evidence-based complementary medicine into mainstream practice.

Australian Lifestyle Medicine Association and Australian College of Nutritional & Environmental Medicine: Active in the field of integrative medicine.

Royal Australian College of General Practitioners: Very involved in primary care and has recently established a Fellowship for Integrative Medicine.

Australia Health Tourism (AHT): Has assembled Australia’s leading clinicians in their respective fields and will provide commensurate diagnostic support, nursing, concierge, hospital, and post-operative recuperative environments (from serviced apartments to 5 star hotel accommodations).

Austria

Population (2011): 8.2 million

International tourist arrivals (2009): 21.4 million

International tourism receipts (2009): US\$19.4 billion

Profile of Medical & Wellness Tourism

- Austria has a long history of thermal baths and spas, but these have traditionally been a place for locals and for the elderly. Over time, Austria's wellness-related offerings have started to attract the interest of younger and wealthier tourists to Austria (often pursuing wellness-related activities as one part of their vacation).
- Central Europe and German-speaking countries are the key markets for Austria in medical and wellness tourism. Domestic tourism also plays a major role in wellness and spa-related tourism.

Medical Tourism Trends

- Austria has a world-class healthcare system, with state-of-the-art facilities and highly-qualified medical personnel. Medical tourism is not directly promoted by the national government, but medical tourists are attracted to Austria due to its high quality of care, short waiting times, and excellent post-care/rehab facilities.
- Treatments that are popular with foreign tourists include cosmetic and reconstructive surgery, elective surgery (such as obesity surgery), dentistry, and cancer treatment.
- According to Austria's national investment promotion company (ABA), there are 200 private clinics and rehabilitation centers in Austria.
- Austria has four organizations with JCI accreditation (one hospital, one laboratory, and two rehab resorts that offer post-procedural care).

Wellness Tourism Trends

- Austria has a highly-developed wellness tourism industry, but it is dominated by domestic tourists. International tourists to Austria tend to mix wellness with other activities (e.g., outdoor recreation).
- According to Austria's national investment promotion company (ABA), 11% of all tourists in Austria make health-oriented holidays (about 3.5 million wellness visitors annually), and the country is a European leader in this market.⁴³
- Wellness tourism has been growing steadily in Austria, and has especially become a major tourism sector for the country over the last 5 years.
- Thermal spas are a dominant feature of Austria's wellness tourism market, but these are largely visited by domestic day visitors. International visitors are more likely to be attracted to larger and more luxurious spa/wellness hotels.
- There were 989 spa/wellness hotels in Austria in 2010 (with 170 of those opening in the previous two years), and these generate EUR1.15 billion annually. Many of these hotel/resorts offer thermal/mineral waters that are considered to have healing properties.
- Austria's tourism promotion website highlights both "Alpine Spas" and "Thermal Spas," but also jointly promotes Austria's natural environment and outdoor activities.

⁴³ See: http://www.aba.gv.at/uploads/ABA_Tourism_Austria_2010_10703_EN.pdf

Where Does Spa Fit?

- There is no real definition of the word “spa” in Austria – the word “bad” or “therme” tends to be used for water-based facilities. Wellness is also a frequently-used word in Austria.
- Key spa categories marketed to international tourists include: *Alpine Spas* (offer altitude and fresh air, as well as ingredients found exclusively in the Alps) and *Thermal Spas* (use water-based treatments and therapies, some of which have medical value). Austria has a small number of medical spas (e.g., Lanserhof, Viva Mayer, Hotel Lam), which offer medical treatments, nutrition, and detox.
- According to Austria’s national investment promotion company (ABA), Austria’s spas attract about 8 million visitors per year. An estimated 75% of visitors to Austrian thermal spas are day guests, and most visitors are domestic.

Government Support & Promotion for Medical & Wellness Tourism

- The Austrian National Tourist Office actively supports and promotes wellness tourism. There is no national-level promotion of medical tourism.
- Since medical tourism is not really an officially-promoted sector, there is little cooperation between the tourism and health sectors in Austria (although the health sector itself is highly regulated).
- According to Austria’s national investment promotion company (ABA), about one-third of the development incentives offered by ÖHT (Austrian Hotel and Tourism Bank) are designated for wellness-related projects.
- Launched by the Ministry of Economic Affairs in 2002, the “Best Health Austria” (<http://www.besthealthaustria.com/>) initiative has established an Austrian quality mark for health tourism (i.e., both the medical and wellness tourism sectors), based on the evaluation of over 130 criteria. It has been officially recognized throughout the EU since 2005. Currently, over 50 private sector businesses have become Best Health partners or are in the process of being certified (these include clinics, rehabilitation centers, spas/thermes, health resorts/centers, and tourist accommodation establishments).
- Much of the promotion and development of wellness tourism takes place at the provincial level in Austria (and many of the provinces actively compete against each other). There are a number of provincial-level initiatives and partnerships: for example, the *Tyrol Wellness Cluster* is a regional network of companies focusing on wellness, wellbeing, and health, and on using alpine resources for the development of a unique and authentic regional wellness product. The cluster group’s activities include promoting the brand “Tyrol Wellness” at the national and international levels, developing new product innovations, organizing cluster events, and so on. Over 100 Tyrol region companies in the wellness and healthcare sectors participate in this initiative.

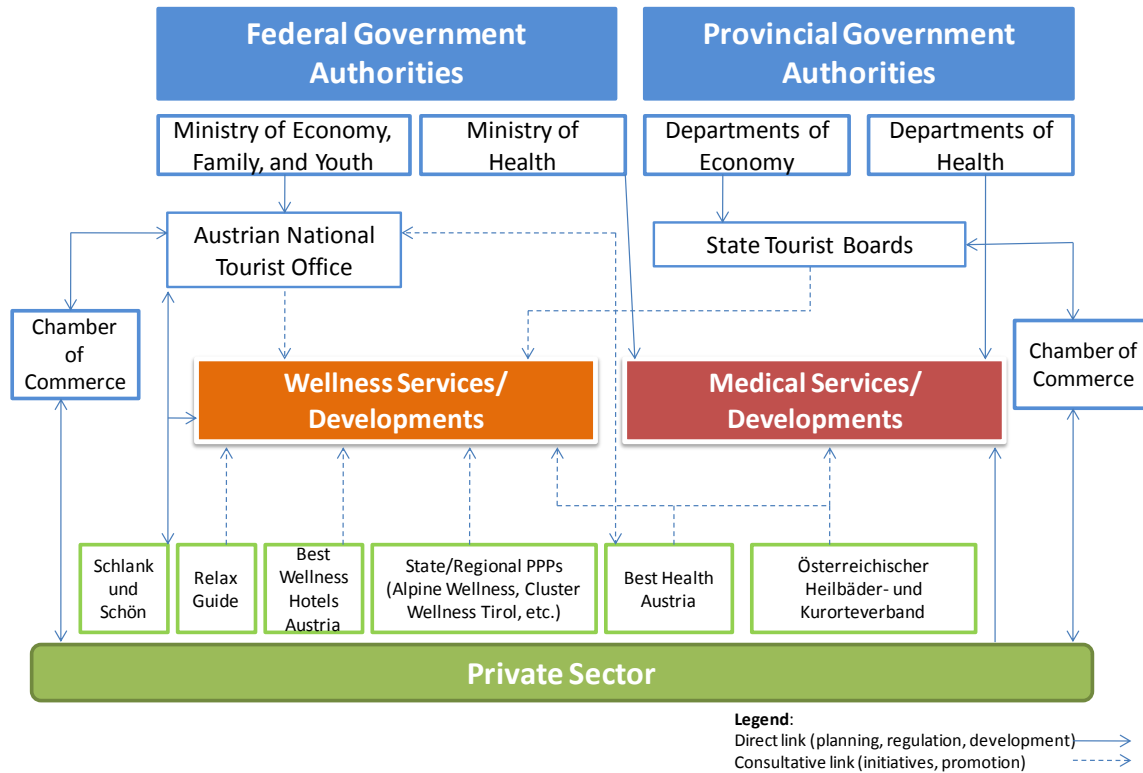
Key National Websites where Medical and Wellness Tourism are Promoted:

Austria’s national tourism website promotes wellness and spa tourism under similar headings across its various international mirror sites:

- U.S. site - “Rejuvenation”: <http://www.austria.info/us/rejuvenation>
- UK site – “Wellbeing & Spa”: <http://www.austria.info/uk/wellbeing-spa>
- India site – “Wellbeing & Spa”: <http://www.austria.info/in/wellbeing-spa>
- German site – “Aufatmen & entspannen”: <http://www.austria.info/de/erholen-entspannen>

Private/spa industry promotional website: <http://www.spaaustria.com/>

Organizational Structure for Medical & Wellness Tourism – Austria



Ministry of Economy, Family, and Youth: Main authority dealing with the following tourism-related issues: trade law (apprenticeship training), tourism statistics, international tourism agreements, financial support to tourism.

Austrian National Tourist Office (falls under Ministry of Economy, Family, and Youth): Responsible for tourism promotion both internationally and domestically. Funded 75% by the national government and 25% by the Austrian Chamber of Commerce, and also generates revenue through fee-based marketing services.

Ministry of Health: Its goal is to create transparency, recognize problems, and draw up solutions that give people in Austria the security that they will receive the best possible treatment if they become ill. A particularly important point is that health care policy is not just about so-called “reparatory medicine,” but about promoting and preserving people’s health.

Provincial Authorities (Departments of Economy, Departments of Health, State Tourist Boards): Austria’s 9 federal provinces are responsible for issuing their own tourism laws and other regulations affecting tourism (e.g. environmental regulations, building codes); providing subsidies to tourist destinations and projects; establishing other regional tourism support programs; and conducting their own tourism promotion efforts.

Chamber of Commerce: Industry organization providing support (e.g., services, policy coordination, foreign trade promotion) for its over 400,000 members.

Schlank und Schön/Relax Guide/Best Wellness Hotels Austria/Best Health Austria: Industry marketing cooperations providing promotion activities and operating distribution systems.

State/Regional Public Private Partnerships (PPPs): Cooperations between state organizations and industry members to develop and manage new products (such as Alpine Wellness, Cluster Wellness Tirol, or Styrian Baths).

Österreichischer Heilbäder- und Kurorteverband: Industry association of medical baths and healing cities.

Brazil

Population (2011): 203.4 million
International tourist arrivals (2009): 4.8 million
International tourism receipts (2009): US\$5.3 billion

Profile of Medical & Wellness Tourism

- Brazil is primarily known as a destination for medical tourism (especially for plastic surgery), and is not particularly known for wellness tourism or spa-related tourism. The national government is not currently active in promoting or developing either medical tourism or wellness tourism.
- The 2014 World Cup and 2016 Summer Olympics are expected to significantly raise Brazil’s profile as a tourism destination, and there may be an increased interest in promoting medical and wellness tourism in the country in preparation for the influx of tourists that may come as a response to these events.

Medical Tourism Trends

- Brazil is an active player in the medical tourism market, and cosmetic surgery is the most popular offering for medical tourists. Brazil is sometimes called the “plastic surgery capital of the world.”
- Brazil has 4,500 licensed cosmetic surgeons (and the highest number per capita in the world). Many of these surgeons were trained and certified in the United States and are considered to be world-class.
- There is interest in Brazil in expanding its reputation as a quality medical tourism destination beyond just cosmetic surgery. Other popular treatments in Brazil include eye surgery and vision correction, fertility treatments, dermatology, obesity surgery, neurosurgery, cardiac surgery, dentistry, and hair transplants.
- The cost of medical procedures in Brazil is lower than in the United States, but higher than in other key medical tourism destinations in Asia (such as Thailand and India) or Latin America (e.g. Costa Rica).
- Brazil currently has 25 hospitals and medical centers jointly accredited by JCI and the Consortium for Brazilian Accreditation (CBA) – more than all other Latin American countries combined.
- While there are no official statistics on medical tourism, local estimates are that 48,000 medical tourists visited Brazil in 2005/2006, growing to 180,000 in 2009 (these statistics are quoted in a number of articles, but are of unknown origin).
- The main source countries for medical tourists to Brazil include: United States, Angola, Italy, France, Portugal, UK, Japan, Netherlands, and Germany.
- Language barriers are an issue for further development of medical tourism in Brazil, as English is not widely spoken, and this poses a challenge for North American tourists. In addition, many hospitals (including accredited ones) lack the internal structures and staff skills to deal effectively with international visitors.

Wellness Tourism Trends

- Wellness and spa tourism is an undeveloped market in Brazil, and the country is not actively promoting it.
- Brazil has a few spas, as well as several holistic, wellness, and spiritual retreats, but this is a very small niche.
- Ecotourism is a key tourism product in Brazil, and there is a growing interest in eco-spas or retreats. These products could be effectively packaged with wellness tourism offerings if there is interest in the private/public sectors in doing so.

Where Does Spa Fit?

- Brazil has a very new and undeveloped spa market, and spas are not actively marketed by the country to international tourists. Among the major international listings of spas (e.g., SpaFinder, SpaIndex), there are only about 5-10 spa listings for Brazil (mostly day spas and hotel/resort spas).
- Brazil (among other Latin American countries) has a long history of “holistic medical centers,” typically managed by a medical doctor, which provide aesthetic treatments, dermatology, plastic surgery, and other beauty services. These are increasingly adding spa-like services (such as aromatherapy, massage, meditation, integral wellness) and are becoming more like a medi-spa concept, although they are not labeled as “spas”. These primarily serve the domestic market.
- It is now considered essential for 4-5 star hotels in Brazil (and other Latin American countries) to have a spa, but this is a relatively recent phenomenon.
- Eco-spas and adventure spas are new products in Brazil, and interest in these is growing.

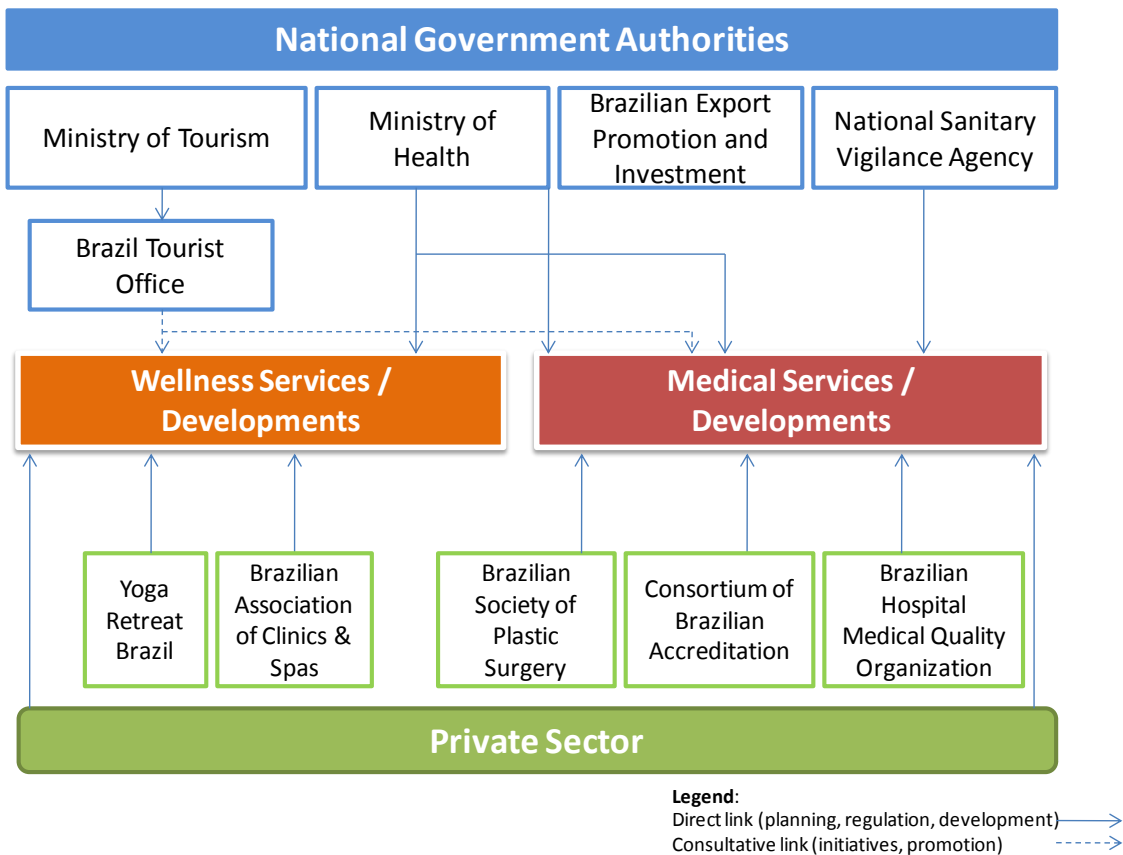
Government Support & Promotion for Medical & Wellness Tourism

- Brazil’s Ministry of Tourism does not specifically promote medical, wellness, or spa tourism and does not partner with the private sector to develop these markets.
- There is also little to no cooperation among private sector providers. Hospitals/clinics/doctors promote themselves independently to attract medical tourists and do not really work together to promote the country as a medical tourism destination. Links between hospitals and accommodation providers (e.g., hotels) are also weak.
- One regional-level development is the creation of the Porto Alegre Health Care Cluster (<http://www.portoalegrehealthcare.org/>) in the largest city in southern Brazil. It is the country’s first public-private organization focused on development medical tourism in Brazil, and it brings together city government, hospitals and doctors, and related associations to promote the region cooperatively.
- Government interest in medical tourism may start to grow as the country positions itself to receive an influx of tourists in response to the 2014 World Cup and 2016 Summer Olympics.
- As an indicator of increasing interest and cooperation in this sector, Brazil recently held its first medical tourism conference in Sao Paulo (Summer 2010). Another event is scheduled for August 2011, at which time they will also be holding their first Brazilian Spa Congress.

Key National Websites where Medical and Wellness Tourism are Promoted:

Brazil does not promote medical or wellness tourism on its national tourism website (<http://www.braziltour.com/>).

Organizational Structure for Medical & Wellness Tourism – Brazil



Ministry of Tourism: Legislative and administrative body for tourism.

Brazil Tourist Office: Does tourism promotion for international markets.

Ministry of Health: Regulatory and administrative body for health services.

Brazil Export Promotion and Investment (APEX): Provides indirect support for spa and medical tourism services.

National Sanitary Vigilance Agency (ANVISA): Responsible for setting all rules related to legal requirements for sanitary procedures, structure, and services, which end up having a high influence in all the business related to spas and aesthetic clinics.

Yoga Retreat Brazil: Web-based platform and promotional services for yoga retreats throughout Brazil.

Brazilian Association of Clinics and Spas: Professional organization of clinics and spas providing various services for its members (e.g., education) and the general public.

Brazilian Society of Plastic Surgery: Professional organization of plastic surgeons.

Consortium of Brazilian Accreditation: Provides accreditation services for hospitals.

Brazilian Hospital Medical Quality Organization: Provides accreditation services for hospitals.

Canada

Population (2011): 34.0 million

International tourist arrivals (2009): 15.8 million

International tourism receipts (2009): US\$13.7 billion

Profile of Medical & Wellness Tourism

- Canada’s wellness tourism sector is relatively new (and is dominated by domestic travelers), and the country does not really have a medical tourism sector.
- Canada’s extensive natural resources are an important foundation for developing nature-based and outdoor recreation-based tourism combined with accommodation in wellness retreats or lodges. However, Canada’s sports, fitness, and outdoor recreation products have not yet been packaged effectively to attract large numbers of international tourists.

Medical Tourism Trends	Wellness Tourism Trends
<ul style="list-style-type: none"> • Canada has very little medical tourism – it mainly consists of Americans visiting to receive cheaper treatments, as well as Canadian expatriates returning for treatments. • Medical tourism is unlikely to grow in Canada due to the relatively high cost of treatments (except for American visitors). • Canada is a major source of outbound medical tourism (i.e., Canadians going abroad for treatments, often due to lengthy waiting time for certain procedures). 	<ul style="list-style-type: none"> • Wellness tourism is relatively new in Canada (and did not exist at all 10-20 years ago). Although Canada has promoted wellness tourism more proactively since the mid-2000s, the country still does not have a distinctive national wellness tourism brand. • The spa sector plays a central role in Canada’s wellness tourism market, along with retreats. • Wellness services and products in Canada tend to focus on hydrotherapy, algotherapy (use of algae in treatments), angotherapy (warm-mud treatments), sudation (sauna), exfoliation, pressure, and massage. Fitness programs, wellness assessments, and nutritional counseling are other key services. • Health is increasingly emphasized in Canada (e.g., nature, good diet, fresh air, exercise) and many lodges, resorts, and retreats have introduced “wellness centers” to appeal to these travelers. • There are an estimated 2,000+ conference and retreat centers in Canada providing health, wellness, and spirituality offerings (e.g., yoga, meditation, life coaching, etc.). Canada also has several luxury rehabilitation retreats. • Canada’s sports, fitness, and outdoor recreation offerings are increasingly being packaged in combination with spa, wellness, and retreat-based offerings – especially in an attempt to attract more international tourists. • There is a small but increasing emphasis on wellness-related offerings based on Canada’s First Nations (indigenous) traditions.

Where Does Spa Fit?

- Spas are the central players in Canada's wellness tourism sector (including hotel/resort, destination, and day spas). A 2006 study by the Canadian Tourism Commission estimated that one-third of Canada's 2,300+ spas are "tourism oriented."⁴⁴
- The spa industry is still relatively new in Canada, but is growing rapidly. An estimated 75% of Canadian spas were less than 10 years old in 2007. Spas are targeting new markets by packaging spa with other activities (e.g., golf, skiing, outdoor recreation).
- As Canada's national spa organization, *Leading Spas of Canada* (<http://www.leadingspasofcanada.com/>) is a major representative voice for the industry, but represents only about 165 spas among the country's estimated 2,300+ spas.
- Quebec has a prominent member alliance called *Spas Relais Santé*, which was established in 1993 and represents 20+ spas in this Canadian province.
- There is no national system of standards or regulation for the Canadian spa industry, and many provinces have little or no licensing for spa practitioners. *Leading Spas of Canada* introduced a pilot Quality Assurance program in 2009, and 35 Canadian spas now hold a "Quality Assurance Approved" status. The program is now available to spas around the country.

Government Support & Promotion for Medical & Wellness Tourism

- The Canadian Tourism Commission's (CTC's) Spa Health and Wellness Tourism Taskforce was established in 2004. The Taskforce was given a two-year mandate to take on an industry-led approach to the following activities and initiatives:
 - Increase industry support and buy-in for CTC spa, health, and wellness tourism programming.
 - Increase revenues and profits for Canadian spa operators.
 - Foster sustainable, high-quality, spa, health, and wellness travel experiences around the country.
 - Increase the capability of Canadian spa, health, and wellness tourism operators to be globally competitive.
- One of the Taskforce's initial activities was to prepare a business strategy for the spa, health, and wellness tourism sectors, called *For the Health of It*,⁴⁵ and it has generally taken the lead in developing and promoting these sectors.
- CTC (in conjunction with Health and Wellness Tourism Taskforce) developed the parameters of the 2004 "For the Health of It" spa sector business strategy and defining the types of spas that CTC felt were 'tourism' oriented. In order to participate in CTC's programs, spa facilities must offer health and wellness programs administered by professionally trained medical personnel; must offer accommodations (either on-site or through a cooperating facility – although rural/urban day spas are also eligible); and must receive at least 10% of revenues from tourist visitors. The Taskforce carried over into subsequent research studies as well, but this scheme only remained in effect for as long as the Taskforce was in place. The Health and Wellness Tourism Taskforce ended in 2006 when CTC discontinued its activities in product development.
- Promotion of wellness and spa tourism increasingly takes place at the provincial government level, and provincial governments are now primarily responsible for marketing in the United States (rather than the CTC). The level of attention/focus varies from province-to-province.
- In 2008, CTC worked with *Leading Spas of Canada* and other private sector and provincial organizations to compile and promote a list of unique Canadian spa experiences across the country (*Spas: The Canadian Experience – Guidebook 2009*⁴⁶).

⁴⁴ See: http://en-corporate.canada.travel/sites/Corporate/images/pdf/Research/Product-knowledge/Spa/2006_Canadian_Spa_Sector_Profile_eng.pdf

⁴⁵ See: <http://dsp-psd.pwgsc.gc.ca/Collection/C86-199-2004E.pdf>

⁴⁶ See: http://en-corporate.canada.travel/sites/Corporate/images/pdf/Research/Product-knowledge/Spa/ctc_spa_book_en_standard.pdf

Key National Websites where Medical and Wellness Tourism are Promoted:

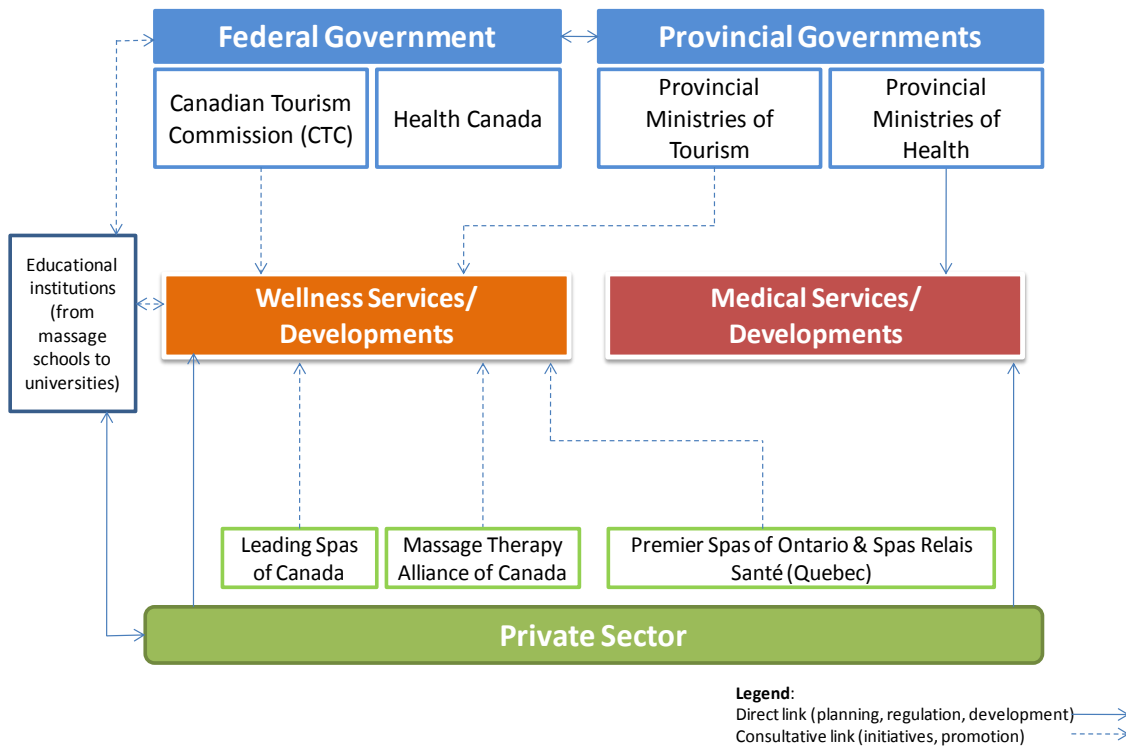
On the Canadian national tourism website, spa and wellness tourism are listed under the heading “Things To Do”:

- <http://uscw.canada.travel/ConsumerWeb/ThingsToDoGallery.page?searchContentTypeClassName=Experience>

A sample of spa and wellness-related promotion on provincial-level websites:

- Ontario (under “Things to Do” there is a section on “Spas”):
<http://www.ontariotravel.net/TcisCtrl?site=consumers&key1=experiences&key2=Spas&language=EN&linkType=1>
- Quebec (buried under “Explore” / “Tailor-Made Holidays” there is a section on “Spas”):
<http://www.bonjourquebec.com/qc-en/vacancesante0.html>
- British Columbia (buried under “Things to Do” / “Rest & Relaxation” there is a section on “Spas & Wellness”): <http://www.hellobc.com/en-CA/SightsActivitiesEvents/RestRelaxation/Spas/BritishColumbia.htm?Lev1=9>
- Alberta (under “Things to Do” there is a section on “Spas & Wellness”):
http://www.travelalberta.com/en/Activities/Spa_Wellness/Pages/default.aspx?MetaHashKey=C58B16C422357AD1F26CBBDA34B7C3DA&mrkt=United+States
- Saskatchewan (under “Things to Do” there is a section about “Spas”):
<http://www.sasktourism.com/things-to-do/saskatchewan-spas>

Organizational Structure for Medical & Wellness Tourism – Canada



Canadian Tourism Commission: The Canadian Tourism Commission (CTC) is Canada’s national tourism marketing organization. The CTC leads the Canadian tourism industry in marketing Canada as a premier four-season tourism destination. The Commission supports the Canadian economy by generating tourism export revenues. Through collaboration and partnerships with the private sector, the Government of Canada, plus provinces and territories, the CTC works with the tourism sector to main our competitiveness and reposition Canada as a destination where travellers can create extra-ordinary personal experiences.

Health Canada: Responsible for helping Canadians maintain and improve their health and supporting the development of Canada’s healthcare sector.

Provincial Ministries of Tourism: Do their own tourism development/promotion and are increasingly playing a role in marketing spa and wellness tourism. Can also set their own standards/regulations for spas.

Provincial Ministries of Health: Responsible for the healthcare sector at the provincial level.

Leading Spas of Canada: Membership organization that provides support for the development and promotion of the Canadian spa industry. Has developed a Quality Assurance program for spas.

Massage Therapy Alliance of Canada (MTAC): Each province has different requirements for practicing massage therapy in their jurisdiction. MTAC is a new national-level organization (replacing the Canadian Massage Therapist Alliance (CMTA)). MTAC’s affiliated provincial associations require their members to be successful graduates of a recognized curriculum.

Premier Spas of Ontario & Spas Relais Santé (Quebec): Membership organizations/associations representing the spa industry at the provincial level.

Hungary

Population (2011): 10.0 million
International tourist arrivals (2009): 9.1 million
International tourism receipts (2009): US\$5.6 billion

Profile of Medical & Wellness Tourism

- Hungary is rich with geothermal water resources, and bathing culture dates back to pre-Roman times. Thermal and medical waters are the country's key foundations for medical and wellness tourism and can be found in over 80% of Hungary.
- Domestic travelers are a key driver for both medical and wellness tourism:
 - 58% of medical and wellness tourism-related guest nights are generated by Hungarian travelers. Domestic travelers generate 24 million visits annually at the country's thermal/medical baths.
 - State subsidies are provided to Hungarian citizens through the National Health Services for medical travel and treatments (10 treatments can be used by prescription annually). Holiday checks (purchased by companies for their employees or given to disadvantaged groups) can also be used for preventive/spa treatments (that might change, however, due to new regulation and scheme as of January, 2012).
 - Without the state subsidies, medical and wellness services would typically be too expensive for the average Hungarian.
 - Domestic medical and wellness travelers spend an average of US\$41/day.
- International travelers typically prefer to visit modern, purpose-built bath complexes and historic facilities (e.g., Turkish and baroque-style baths in Budapest), as well as dental clinics and wellness and medical hotels (e.g. for balneotherapy).
 - A key attraction for international travelers is the high quality of services and medical personnel, as well as the good price/quality ratio (as compared to prices in Western Europe).
- International medical and wellness travelers spend an average of US\$82/day (which is higher than the average spending for a regular international tourist to Hungary, at US\$70/day).

Medical Tourism Trends

- Hungary's medical tourism market is very much tied to its thermal/medical baths and historic bathing culture, or some other natural healing asset (e.g., mud, microclimate). Hungary also has mainstream medical tourism focusing on dental treatments, plastic surgery, and orthopedic surgery (although this aspect of medical tourism does not seem to be actively promoted by the government).
- Medical tourism typically involves a tourist using medically prescribed medical and leisure services at a medical bath or medical hotel (with a doctor on site and/or strong links to a hospital).
- Hungary's 32 *medical hotels* must have doctors and trained medical staff on site and provide medical treatments (typically based on natural healing assets).
- Visits to *medical hotels* are roughly split among international tourists (300,000 visits in 2009) and domestic tourists (400,000 visits in 2009).
- Most medical tourists come from Germany, Austria, the UK, and Russia.

Wellness Tourism Trends

- A number of new *wellness hotels* were built over the last 10 years (with over US\$175 million of EU/state subsidies), and wellness tourism has started to grow as a result.
- Wellness tourism in Hungary almost exclusively means visits to *wellness hotels*.
- Hungary's 92 *wellness hotels* typically offer thermal water pools, wet areas, pampering treatments, fitness services, beauty services, and healthy cuisine.
- Visits to *wellness hotels* are primarily from domestic tourists (500,000 visits in 2009) and to a lesser extent international tourists (150,000 visits in 2009). Guest nights at *wellness hotels* have grown by 400% from 2004-2008.
- Wellness tourists tend to come from Germany and Austria.

Where Does Spa Fit?

- The term “spa” in Hungary is most often synonymous with “bath”, although other kinds of spa facilities are growing in the country (sometimes causing confusion for tourists).
- The role of spas in medical and wellness tourism is primarily through facilities that exist within Hungary’s bathing complexes, wellness hotels, and medical hotels. There are very few destination spas, and day/club spas are relatively new to the market.
- The service spectrum is very fragmented – there are some high-end, international caliber facilities in wellness hotels and private medical clinics, while facilities in municipal baths have more of a hospital-like feel and serve only the local market.

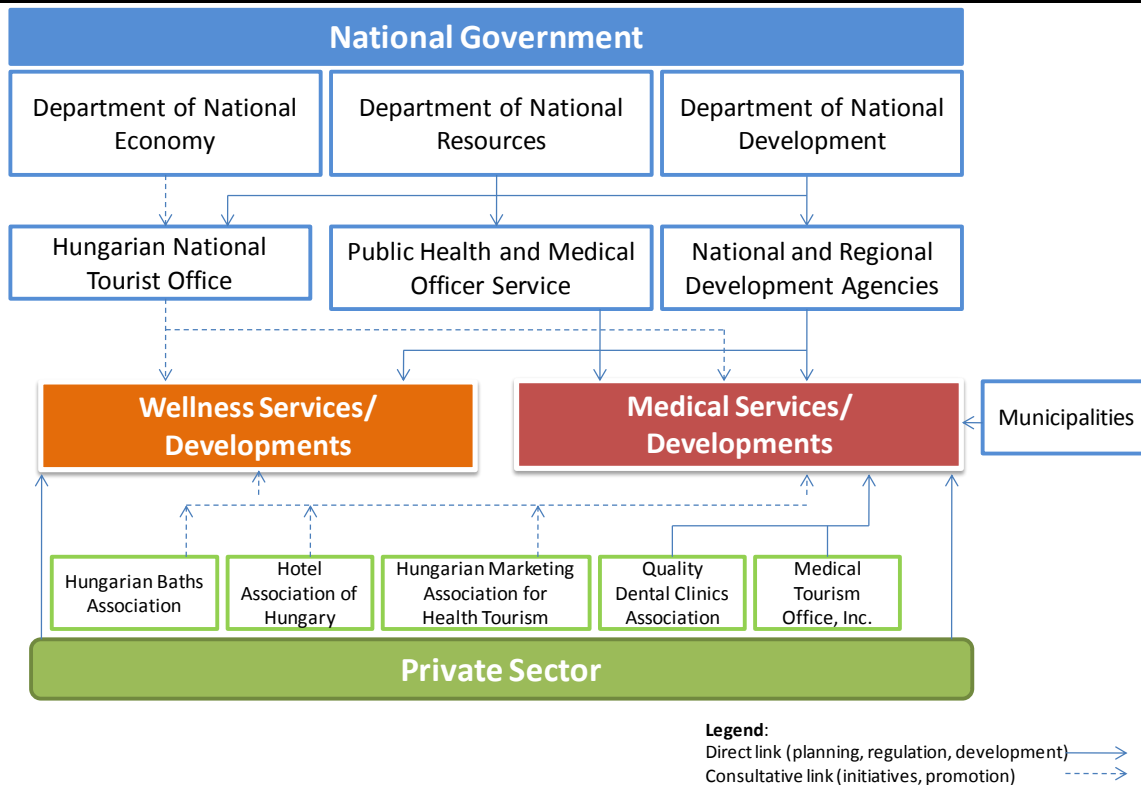
Government Support & Promotion for Medical & Wellness Tourism

- Since most thermal/medical baths in Hungary are owned by local municipalities – and since the thermal/medical waters are the key foundation for Hungary’s medical and wellness tourism – there is a strong connection between the government and the medical and wellness tourism industry. On the other hand, there is no well-defined cooperation between the healthcare and tourism sectors.
- A number of national development plans in Hungary have supported medical and wellness tourism:
 - The *Széchenyi Tourism Development Plan* (2000) supported the development of thermal baths and related infrastructure and hotel capacity.
 - The 10-year *Health Tourism Development Programme* (2000-2010) –had as its aim to gain a leadership position in the European medical tourism market by the end of 2010. However, the program encountered challenges because: 1) natural asset-based medical services are not always recognized or accepted in many countries; and 2) the country has tried to attract different generations and types of tourists to the same facilities, which has not been a successful approach (e.g., building aquapark facilities for children alongside traditional medical facilities for the elderly).
 - Hungary’s *New Széchenyi Tourism Development Plan* (2010)⁴⁷ has a more narrow focus on developing medical tourism, with an emphasis on thermal and medical waters, as well as surgical treatments. Rehabilitation (e.g., post-operation recuperation treatments) may also be supported.
 - The Hungarian government has recently announced that it plans to prepare a national *Dental Tourism Strategy* and considers this to be a primary industry for development. The government will provide US\$171 million of support for the industry (which they estimate to be a US\$331 million industry in Hungary).
- International promotion of medical and wellness tourism is led by the Hungarian National Tourist Office (HNTO), and in some years the country’s national promotion campaigns have been led by an emphasis on medical and wellness tourism. HNTO promotional activities tend to focus on medical hotels, wellness hotels, and medical baths, under the label of “Spa & Wellness.” The HNTO does not directly promote hospitals or dental clinics that serve international tourists. HNTO’s most recent international promotion campaign (launched January 2011) focuses on “Natural Waters” (e.g., thermal and medical spring waters).
- For domestic promotional efforts, the HNTO tends to separate medical tourism and wellness tourism services and has created a separate promotional website (<http://wellness.itthon.hu/>), which has also been translated into other languages (<http://www.spasinhungary.com/>).
- HNTO has an “Air Marketing Fund” that aims to develop new air routes to key Hungarian destinations, with special emphasis on acquiring new carriers to one of the country’s key medical tourism destinations (Hévíz). There are also various fairs/exhibitions promoting medical and wellness tourism services.
- Until the end of 2010, *medical hotels* and *wellness hotels* were regulated by the government. As of 2011, this arrangement is planned to be replaced by an industry-driven initiative and classification system (developed and managed by the Hotel Association of Hungary).

⁴⁷ See: http://www.ngm.gov.hu/data/cms2084680/New_Szechenyi_Plan.pdf

Key National Websites where Medical and Wellness Tourism are Promoted:

- National tourism website (“spas and wellness” are prominently promoted):
<http://www.hungary.com/spa-wellness>
- Dedicated national website for spas and wellness (has subsection for medical tourism):
<http://www.spasinhungary.com/>

Organizational Structure for Medical & Wellness Tourism – Hungary

Hungarian National Tourist Office (HNTO) (falls under *Department of National Economy*): Leading government organization for promoting medical and wellness tourism.

National Public Health and Medical Officer Service (falls under *Department of National Resources*): Regulates medical waters, medical baths, and hospitals.

National and Regional Development Agencies (fall under *Department of National Development*): Prepare the Action Plans for the National Development Plan. Define priorities and industries eligible for national and European Union co-funded project developments (e.g. medical tourism facilities).

The Notary of Local Municipalities: Monitors baths and medical hotels.

Hungarian Baths Association: Industry association providing a platform for information exchange and industry actions; has developed a bath categorization system.

Hotel Association of Hungary: Responsible for categorization and classification of hotels; currently working on developing new criteria for *medical hotels* and *wellness hotels*.

Hungarian Marketing Association for Health Tourism: Industry association working for a better understanding and promotion of the industry; shares industry information and runs various schemes (e.g. Sauna Master).

Quality Dental Clinics Association: Mission is to promote Hungarian dental tourism and provide a high standard of ethics and professional conduct among dentists.

Medical Tourism Office, Inc.: Private company that fosters incoming medical tourism and lobbies for government support.

India

Population (2011): 1.2 billion

International tourist arrivals (2009): 5.1 million

International tourism receipts (2009): US\$11.1 billion

Profile of Medical & Wellness Tourism

- India has long been a well-known destination for wellness tourism and has also become one of the world's leading countries for medical tourism.
- The key attractions for both medical and wellness tourism in India include:
 - Low costs of treatments in India relative to other countries;
 - High quality of care (with access to world-class technologies and standards);
 - Lack of language barriers (most medical personnel speak English well);
 - Long history of traditional and alternative healing therapies (e.g., Ayurveda).
- In spite of the long history of wellness and spiritual-based tourism in India, the current promotional approach very much integrates and cross-promotes wellness services with conventional medical tourism services, and even tends to treat wellness tourism as a sub-set of medical tourism.
- Chennai is considered to be the leading state for medical tourism in India, while Kerala is the center of Ayurveda and wellness tourism – but many other Indian states have growing markets and there is active investment in enhanced services, products, and promotion across the country.

Medical Tourism Trends

- India's medical tourism market is focused on international tourists traveling to receive medical and surgical treatments in hospitals, complemented by traditional and alternative therapies.
- Popular treatments for medical tourists include heart/cardio surgeries, eye care, cosmetic treatments, dental care, orthopedic surgeries, organ transplants, and infertility treatments.
- India has 17 hospitals and medical centers internationally accredited by JCI. Hospitals are also accredited by India's National Accreditation Board for Hospitals & Healthcare Providers (NABH), with 69 NABH-accredited hospitals nationwide.
- A study by the Confederation of Indian Industry and McKinsey projected medical tourism to become a US\$2.3 billion business by 2012, and estimated that 150,000 medical tourists visited India in 2005. Estimates from EximBank India are higher, at 500,000 medical tourists in 2006.⁴⁸
- Medical tourists to India come primarily from South Asia and the Middle East, but there is significant growth in U.S. and European patients, as well as from Africa.

Wellness Tourism Trends

- The foundation of wellness tourism in India is its very long tradition of yoga, meditation, Ayurveda, and other spiritual and healing practices.
- India's Ministry of Tourism promotes Ayurveda, "hi-tech healing" (both alternative and conventional medical treatments), spas, yoga, meditation, wellness centers, naturopathy, Panch karma, and Siddha under the banner of "wellness tourism."
- Historically, there are many ashrams across India that offer yoga and/or meditation and that have attracted wellness tourists (especially among those with internationally-famous gurus).
- India's Ministry of Tourism has recently been investing in development of infrastructure for major spiritual tourism destinations, as well as the development of "Wellness Centres" (which tend to offer Ayurveda and holistic/alternative healing) in new locations around the country.
- Wellness tourists in India tend to be high-end travelers from North America, Europe, and the Middle East, as well as wealthy Asian countries.

⁴⁸ See <http://heapol.oxfordjournals.org/content/25/3/248.extract> and <http://www.eximbankindia.com/ht/Exe%20Summary.pdf>

Where Does Spa Fit?

- India's spa industry is still a small, niche market and is dominated by resort spas.
- The official definition of "spa" by the Spa and Wellness Association of India (SWAI) is quite broad and includes: yoga, meditation, herbal medicine, TCM, nutritional and dietary programs, as well as massage, water, steam, sauna, and exercise.
- Medical wellness and cosmetic medical spas have recently become a booming business as they fill in gaps in the traditional health care system. Spas are also connected to medical tourism as part of a post-operative recuperative holiday.
- Northern India has seen the biggest increase in spa development, followed closely by Mumbai. The Kerala region also has an increasing number of Ayurvedic massage centers and spas.
- A key challenge in India's spa industry is authenticity of treatments, which do not always follow the science of traditional practices such as Ayurveda. Many Ayurvedic practitioners question the use of Ayurveda in the spa industry.
- Standards and accreditation for spa services and training are also a challenge, but the SWAI has been working on addressing these issues with government support.

Government Support & Promotion for Medical & Wellness Tourism

- A number of government-led incentive schemes for medical and wellness tourism providers have been developed under the name of Marketing Development Assistance (MDA). These schemes have recently been extended to include support for hospitals accredited by the JCI or NABH; medical tourism facilitators (e.g., tour operators and travel agencies) approved by the government; and wellness tourism service providers.
- Current government promotional activities for medical and wellness tourism include:
 - Organization of overseas road shows by the Ministry of Tourism (with participation of hospitals and other service providers);
 - Identification of 17 overseas medical and wellness tourism-related fairs and exhibitions, for which medical and wellness tourism service providers/facilitators are provided financial support for participation (under MDA).
 - Government funding for medical tourism "expeditions" to Africa to attract African patients to Indian hospitals (targeting countries such as Kenya, Uganda, and Nigeria).
 - Growing encouragement and support for development of niche tourism products such as wellness tourism and promotion of special products such as Yoga, Siddha, Ayurveda, etc.
- The Ministry of Home Affairs has created a Medical Visa for patients and their families coming to India for medical treatments.
- The national government (e.g., Ministry of Tourism, AYUSH, and NABH) has recently been working on accreditation standards for "Wellness Centres" (a broad category that includes Ayurveda centers, spas, skincare centers, cosmetic care centers, gymnasiums, fitness centers, preventive health centers, and yoga centers) in order to improve quality and professionalism, enhance visitor experience, and aid promotion.

Key National Websites where Medical and Wellness Tourism are Promoted:

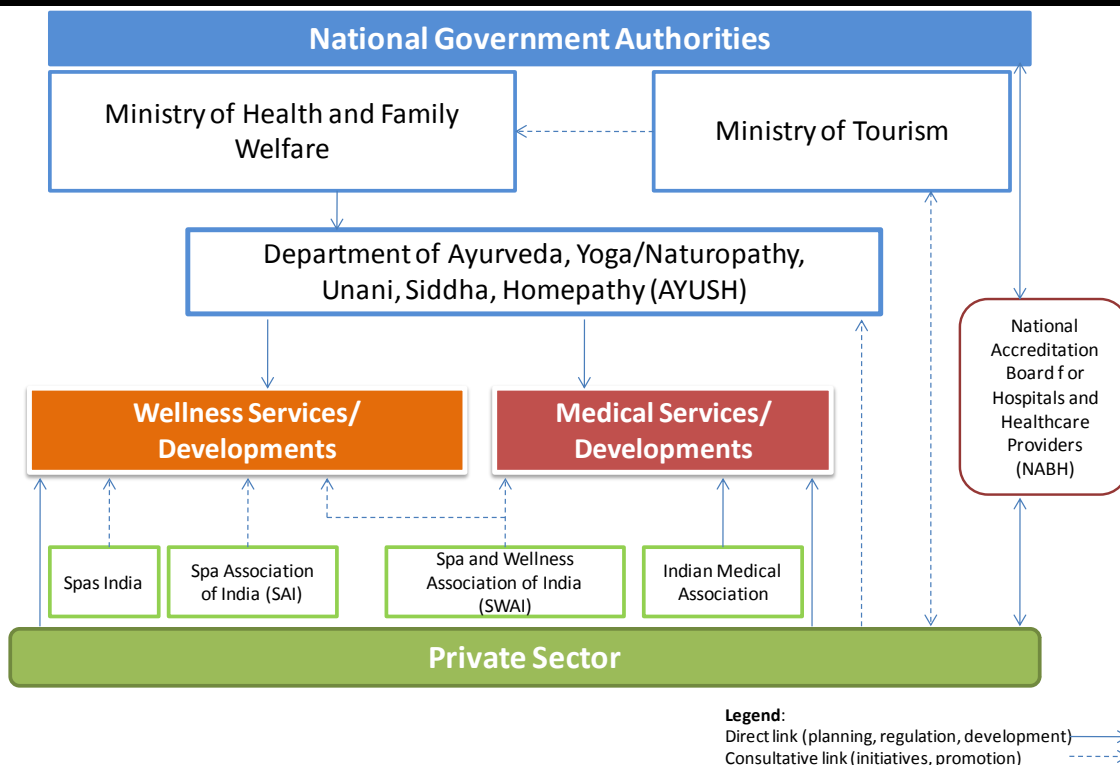
On India's national tourism website (<http://www.incredibleindia.org/>), wellness and medical tourism are both listed under the heading "Tourism Products":

- Wellness: http://www.incredibleindia.org/newsite/cms_page.asp?pageid=492
- Medical: http://india.gov.in/overseas/visit_india/medical_india.php

Dedicated national website for medical tourism promotion:

- <http://indiameditourism.com/>

Organizational Structure for Medical & Wellness Tourism – India



Ministry of Tourism: Leading body for national-level initiatives to develop, support, and promote medical and wellness tourism. Headed by the Secretary/Director General of Tourism, which provided executive directions for implementation of policies and programs. Has 20 offices within India and 14 office abroad, which are primarily responsible for tourism promotion and marketing (domestic offices also monitor progress of Ministry-supported projects).

Department of Ayurveda, Yoga/Naturopathy, Unani, Siddha, Homeopathy (AYUSH) (*falls under Department of Health and Family Welfare*): Responsible for regulation and licensing (such as for spas), and also provides financial support and promotional initiatives for private sector development.

National Accreditation Board for Hospitals & Healthcare Providers (NABH): Independent accrediting organization that accredits hospitals in India (as well as wellness facilities) on a voluntary basis.

Spas India: Spas India's mission is to empower consumers globally to find their perfect well-being experiences at their own convenience, providing global search, magazines/directories, reservation technology, and consultancy services.

Spa Association of India (SAI): A young organization initiated by the (day)spa industry; aims at blending the worlds of wellness, health and skincare, healing, medicine, and spas.

Spa and Wellness Association of India (SWAI): Non-profit trade association, created in 2006, that represents the interests of the professional spa and hospitality industry. Focuses include:

- Preservation and protection of India's traditional therapies (especially yoga and Ayurveda);
- Education, government advocacy, and tourism promotion related to spa and hospitality;
- Commerce activities;
- Research/statistics and media relations;
- Rules, regulations, standards, and legislation for spa industry in India.

Indian Medical Association: The country's only representative, national voluntary organization of Doctors of Modern Scientific System of Medicine, which looks after the interest of doctors as well as the well being of the community at large.

Indonesia

Population (2011): 245.6 million

International tourist arrivals (2009): 6.3 million

International tourism receipts (2009): US\$6.3 billion

Profile of Medical & Wellness Tourism

- Both medical and wellness tourism are new and developing sectors in Indonesia (especially as compared to other Asian countries), although the reputation and image for spa tourism has grown rapidly in Bali.
- Indonesia has many ancient wellness and healing traditions. As the country's medical and wellness tourism markets grow, there is interest in integrating the traditional treatments and herbal preparations into both medical and wellness tourism services/products.

Medical Tourism Trends

- Indonesia is growing in popularity as a medical tourism destination, but it is not currently ranked among the top medical tourism destinations (e.g., Thailand, India, Singapore).
- Interestingly, Indonesia is also a big source of outbound medical tourists to other Asian countries (because they have lower costs and better quality as compared to Indonesia's public healthcare system).
- Indonesia's strengths for developing medical tourism include low costs of treatments (relative to Europe/North America), highly qualified doctors, and modern hospitals.
- Indonesia has 4 JCI-accredited hospitals.
- Although Indonesia's medical tourism sector is still in its infancy, there are efforts to differentiate the country from its neighbors by integrating Western and Indonesian traditional medical practices. For example, two key hospitals in Bali (Sanglah General and Nusa Tenggara) now have clinics based on traditional herbs and acupuncture, and also plan to add a clinical spa.

Wellness Tourism Trends

- Wellness tourism is a relatively new concept in Indonesia, as is the concept of visiting a spa for relaxation.
- The Indonesian government is starting to play a more active role in developing and marketing wellness tourism, and spas are often at the center of these efforts. Much of the development efforts are concentrated in a few key regions of the country (e.g., Bali).
- Bali has become a leader in luxury spa tourism in Asia, and almost all of Bali's top hotels offer world-class spa facilities. Bali's attractions for spa and wellness tourism include its skilled local therapists, abundant local ingredients for spa products, and its natural landscape (with many spas offering services in unique natural settings, such as seaside or in the jungle). A large share of Bali's spa tourists come from other Asian countries (Japan, India, Taiwan, China).
- Outside of Bali, spa holidays are a relatively new concept, and wellness tourism is still negligible.
- One estimate suggests that there were 2.5 million spa tourist arrivals in Indonesia in 2009 (but the source for this statistic is unknown).⁴⁹

⁴⁹ See: <http://blog.euromonitor.com/2011/01/spa-tourism-is-big-business-in-asia-pacific.html>

Where Does Spa Fit?

- The spa market is relatively new in Indonesia (although Bali has quickly become one of the leading spa destinations in Asia). Hotel/resort spas are the most popular form of spas (and these have largely driven the growth in the market), followed by destination spas. Day spas are starting to grow in some larger cities (Jakarta, Surabaya, Bandung), driven primarily by demand from urban residents who cannot afford the luxury of a spa holiday.
- Traditional treatments that are being utilized in spas include Jamu (Indonesian herbal treatment), Balinese Boreh (traditional herbal scrub), Bali Kopi scrub, and the “Royal Javanese Treatment”.
- A very small number of spas offer thalassotherapy.

Government Support & Promotion for Medical & Wellness Tourism

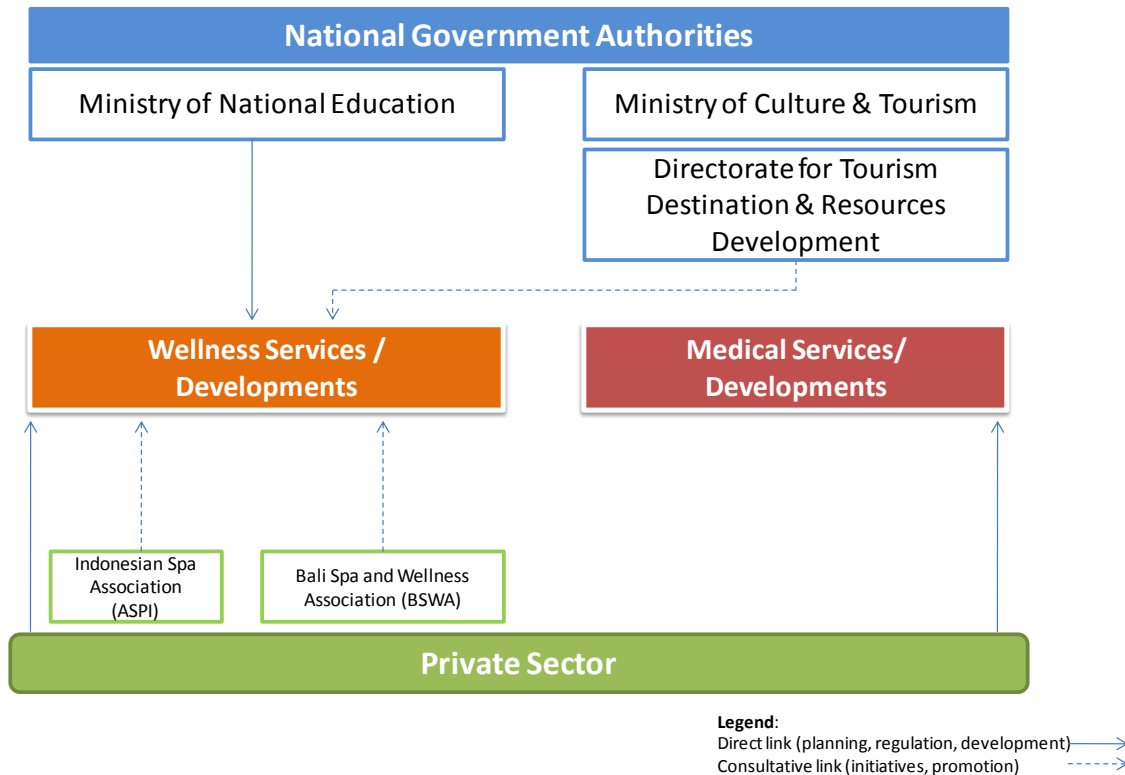
- The Indonesian government is starting to play a more active role in developing and marketing wellness and spa tourism. The government does not have a clearly active role in medical tourism development.
- The government works closely with the *Indonesian Spa Association* on marketing and has created a special directory of spas (called “Fabulous Indonesia Spa”⁵⁰) which describes and promotes around 20 luxury spas, resorts, and hotels around the country, many of which specialize in Indonesian signature treatments like Jamu and Lulur.
- The government also has initiatives underway to work on improving standardization; enhancing skills, products, and services; and improving the business environment for the spa industry.
- Indonesia’s Ministry of Culture and Tourism played a major role, with significant support, in bringing the 2011 Global Spa Summit to Bali.

Key National Websites where Medical and Wellness Tourism are Promoted:

- Indonesia’s national tourism website does not promote medical tourism. The website promotes “Spas” under the menu heading “Activities”: <http://www.indonesia.travel/en/activity/detail/65>
- On the Bali Tourism Board’s website, wellness and spa tourism are not specifically promoted, but information about medical tourism is listed under the heading “About Bali”: <http://www.bali-tourism-board.com/bali-medical.html>

⁵⁰ See: http://cdn.indonesia.travel/download/PromotionalMaterial/images/1687_470-Spa.pdf

Organizational Structure for Medical & Wellness Tourism – Indonesia



Ministry of Culture and Tourism: Provides regulation for the tourism industry and provides tourism marketing and promotion.

Ministry of National Education: Responsible for educating, training, and certifying spa therapists.

Indonesian Spa Association (Asosiasi Spa Indonesia/ASPI): Provides representation to the spa industry; also works to apply standardization regulations under the *Tourism Act of 2009*, and works on other new initiatives (e.g., Professional Certification Institute Spa Nusantara (LSPSN)).

Bali Spa and Wellness Association (BSWA): The Bali Spa and Wellness Association (BSWA) is a non-profit organization representing Bali's spa and wellness industry. Focuses on developing and promoting Bali's spa offerings through education, exchange of ideas, networking, and growth initiatives.

Jordan

Population (2011): 6.5 million
International tourist arrivals (2009): 3.8 million
International tourism receipts (2009): US\$2.9 billion

Profile of Medical & Wellness Tourism

- Jordan is one of the world’s leading countries for medical tourism, and the country has been actively developing and promoting the sector for longer than many other key medical tourism destinations. There is more research and information available for Jordan’s medical tourism sector than in any other country (possibly because many of these studies in Jordan are supported or funded through international donor organizations such as USAID).
- Wellness tourism is much less developed in Jordan, and tends to be centered on the Dead Sea region’s resorts and spas. The country’s other wellness tourism-related assets are not well-developed, although there is an increasing emphasis on promoting this sector in recent years.

Medical Tourism Trends	Wellness Tourism Trends
<ul style="list-style-type: none"> • Jordan has been developing medical tourism for several decades, with Arab patients starting to visit for medical treatments during the 1970s. • Jordan is the leading country in the Middle East for medical tourism. Its advantages include low costs, highly-qualified doctors (many of whom are U.S./UK trained and certified), and good skills in English and other languages. • Around 55-60 private hospitals are involved in medical tourism in Jordan, and the country has 7 JCI-accredited hospitals. These hospitals are largely at capacity, and major investments are being made to expand and build new facilities. • An estimated 250,000 medical tourists visited Jordan in 2007. Average medical tourist expenditures were JD83 per day in 2008.⁵¹ • Medical tourism contributed an estimated JD1.9 billion to the economy in 2008, a 25% increase over the previous year. • Popular treatments in Jordan include cardiovascular surgery, transplants, cancer treatment, orthopedic surgery, and plastic surgery. Dental tourism is also a fast-growing sector. • Jordan is a well-established destination for medical tourists from other Arab countries, especially those where the medical services are not as strong (Iraq, Palestine, Sudan, Libya), and is looking to attract more patients from outside the region (U.S., UK).⁵² 	<ul style="list-style-type: none"> • Jordan has a number of natural resources to support wellness tourism, including the Dead Sea, hot springs at Ma’in, and thermal springs of Zarqa Ma’in. • Wellness tourism promotion in Jordan focuses on the Dead Sea as its centerpiece (including spa/resorts), but the Ma’in hot springs and other natural/adventure offerings are also promoted under this banner. • The Dead Sea region has become the major development region in Jordan for wellness (and religious) tourism and is sometimes described as the “world’s largest natural spa”. • Jordan has a handful of other wellness-related offerings – such as medical spas, hammams/Turkish baths, yoga and meditation retreats (esp. in the desert) – but these are not well-developed or promoted, and it is unclear how much they attract international tourists.

⁵¹ See: http://www.abci.com.jo/cms_files/Tourism_Sector_Report_-_January_2009.pdf

⁵² See: <http://www.jnco.gov.jo/static/pdf/chapter6.pdf> and http://www.jnco.gov.jo/static/pdf/JCR_2008_2009_UPDATE_OF_COMPETITIVE_POSITION.PDF

Where Does Spa Fit?

- Jordan's spa sector is dominated by hotel/resort spas, primarily in the Dead Sea region. Growing international recognition of and interest in the Dead Sea is helping drive growth of spa tourism in Jordan (and this growth is mainly driven by tourists originating from elsewhere in the Middle East).
- The spa industry does not seem to be integrated or linked at all with medical tourism in Jordan.

Government Support & Promotion for Medical & Wellness Tourism

- Jordan has been proactive in promoting and developing the medical tourism sector for much longer than many other leading countries in this market, and is also placing an increasing emphasis on developing the wellness tourism sector. The Jordan Tourism Board has stepped up its efforts at supporting both sectors in recent years and is increasingly cooperating with the private sector.
- Over the last 5-10 years there have been a number of national strategies, plans, and studies supporting these sectors (more so than for any other country competing in these sectors):
 - In 2004, Jordan launched a *National Tourism Strategy 2004-2010*⁵³ that aimed at doubling the size of Jordan's tourism industry by 2010. The strategy focused on developing a number of niche markets, one of which is "Health and Wellness Tourism" (which includes medical tourism).
 - Jordan's Ministry of Planning & International Cooperation conducted a *Medical Tourism Cluster Study*⁵⁴ in 2004 to support the development of the sector.
 - In 2009, the U.S. Agency for International Development supported the preparation of a *Market Demand Assessment and Marketing Strategy for Medical Tourism*⁵⁵ in Jordan.
- Jordan's Ministry of Health has been active in raising the standards for medical tourism and providing support services for medical tourists:
 - In 1998, it set up a special office at Queen Alia International Airport, which supports arriving medical tourists to make the proper connections, provides rapid processing of immigration documents, and provides free shuttle services to hospitals.
 - In 2007, it supported the establishment of the Jordan Healthcare Accreditation Council.
 - In 2010, it set up a Medical Tourism Directorate to monitor the medical services provided to medical tourists and follow-up on complaints made against doctors/hospitals.
- Jordan's current marketing campaign for medical and wellness tourism includes some of the following activities:
 - The Jordan Tourism Board has developed a dedicated promotional brochure marketing its "Leisure & Wellness" offerings.⁵⁶
 - Jordan held its first International Medical Tourism Congress in 2009.
 - In 2009, Jordan launched a medical tourism marketing campaign in the U.S., which included a web campaign, and also hosting a "fam trip" for Medical Tourism Association members, which invited top U.S. healthcare specialists and insurers to visit Jordan's JCI-accredited hospitals.

Key National Websites where Medical and Wellness Tourism are Promoted:

Jordan's national tourism website does not specifically promote medical tourism. The website promotes "Leisure & Wellness" under the heading "What to Do":

<http://www.visitjordan.com/visitjordan/cms/ExploreJordan/LeisureWellness/tabid/73/Default.aspx>

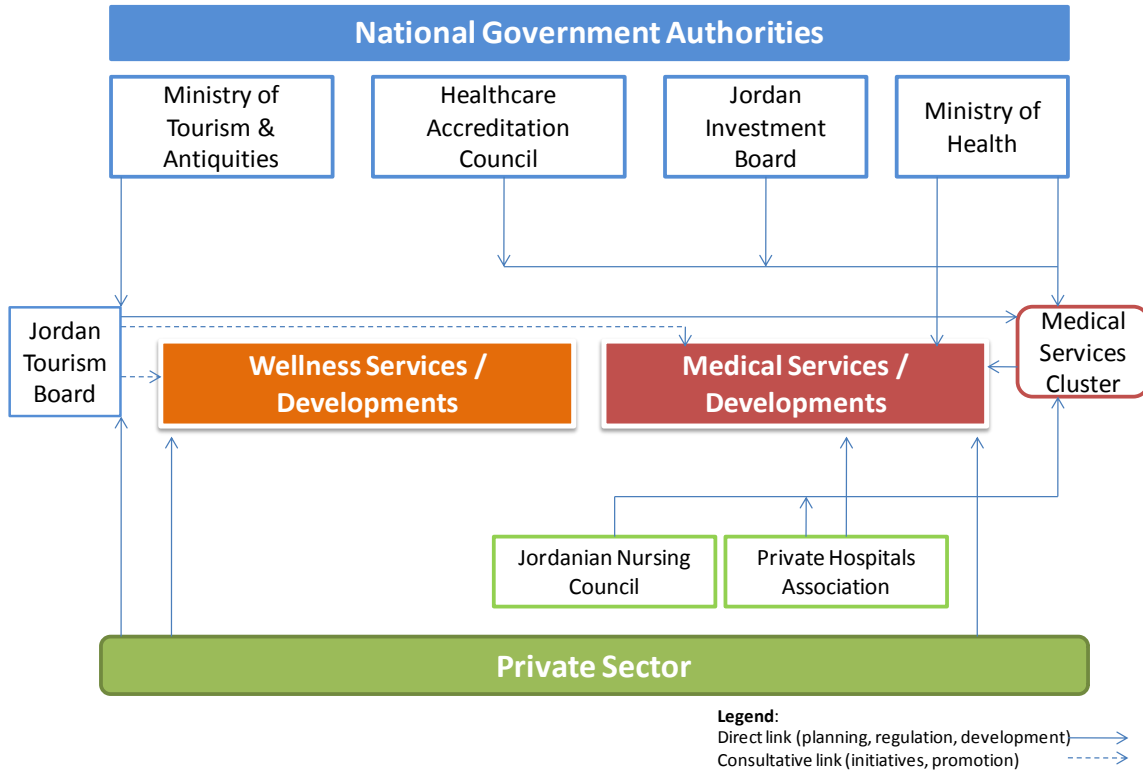
⁵³ See: <http://www.mota.gov.jo/PDFs/NTS%20Book.pdf>

⁵⁴ See: http://www.competitiveness.gov.jo/files/Medical%20Tourism_presented.pdf

⁵⁵ See: http://pdf.usaid.gov/pdf_docs/PNADT053.pdf

⁵⁶ See: http://www.visitjordan.com/e_book/leisure_cover_4.pdf

Organizational Structure for Medical & Wellness Tourism – Jordan



Ministry of Tourism & Antiquities: Works to enhance Jordan’s image as a destination, increase the contribution made by tourism to the national economy, and develop/expand the role of the private sector in tourism investment and attracting capital. Focuses on upgrading tourism services to international standards, upgrading legislation and regulations, developing new sites around the country, and improving human resources.

Jordan Tourism Board: Marketing arm of the Ministry of Tourism & Antiquities. Established in 1998 as a public-private partnership to brand and promote tourism for Jordan.

Jordan Investment Board: An agency entrusted with promoting Jordan as a unique destination for foreign direct investments and sustaining investments to achieve economic prosperity.

Ministry of Health: Primary regulatory body for health service. Supported by the **Jordan Medical Association** (association of doctors) in maintaining standards and regulating hospitalization services pricing and physicians’ fees.

Healthcare Accreditation Council (HCAC): Fosters continuous improvement in the quality and safety of healthcare facilities, services, and programs through development of internationally accepted standards, capacity building, and awarding accreditation.

Jordan Private Hospitals Association: A private, voluntary, non-profit organization established in 1984 to represent the private hospitals in Jordan. Participates in marketing for medical tourism (e.g., representing Jordan at major international medical tourism events), with support from the Jordan Tourism Board.

Jordanian Nursing Council: The aim of this council is to regulate the nursing profession through the development of by-laws, credentialing policies, and strategies to protect the health, safety, and welfare of the public.

Medical Services Cluster: Focuses on expanding Jordan's value proposition using innovative approaches that enhance prosperity. The cluster assists Jordanian healthcare providers, medical technology companies, and health/wellness firms in connecting with global opportunities in three areas: Medical Tourism, Medical Technology, and Wellness and Spa Tourism. It is comprised of the Ministry of Health, Private Hospitals Association, Jordan Tourist Board, Jordan Investment Board, and Healthcare Accreditation Council.

Morocco

Population (2011): 32.0 million
International tourist arrivals (2009): 8.3 million
International tourism receipts (2009): US\$6.6 billion

Profile of Medical & Wellness Tourism

- Morocco has a long history of health and wellness tourism, part of the heritage left from the Roman era, when spas were built in cities such as Tamuda, Tingis, and Volubilis.
- There are many ancient treatments and products at the foundation of the wellness tradition in Morocco, including henna, ghassoul clay, black soap, essential oils, the highly-valued argan oil, and others.

Medical Tourism Trends	Wellness Tourism Trends
<ul style="list-style-type: none"> • Medical tourism is a relatively new and developing sector in Morocco. • Key medical tourism offerings are plastic surgery and orthodontics. Several cosmetic surgery clinics have opened in recent years. • Morocco has well-regarded and highly trained doctors (many of whom were trained in Europe or the U.S.), and medical facilities are modern and of a high standard. • Medical tourists primarily come from Europe (e.g., expats coming home for treatments) and the Middle East. 	<ul style="list-style-type: none"> • Morocco has been promoting health and wellness offerings to tourists since the 1970s. • In practice, wellness tourism in Morocco refers mainly to spas, but the Ministry of Tourism officially defines it more broadly as “offering tourists the means to improve their health and lives through physical, emotional, and spiritual experiences at the host definition and within the host culture.” • Under the heading of “Health & Wellbeing” on the national tourism website, the Moroccan National Tourist Office mainly promotes water-based offerings, including spas, hammams, balneotherapy, thalassotherapy, and sand baths. • In 2005, Morocco was the first African country to provide thalassotherapy, but the seven centers are facing numerous challenges. • Morocco also has a number of health resorts that are more broadly focused on body-mind-spirit offerings and are typically categorized under the label “health tourism”. These are typically located in beautiful natural environments or in major cities. Spas play a role in these, but their offerings also extend to beauty and fitness services, addiction treatment, weight loss, etc.

Where Does Spa Fit?

- The spa sector is relatively new in Morocco; most spas have opened in the last five years, and strong continued growth is predicted in the coming years. There are approximately 550 spas operating in Morocco's eight key tourism cities (Fès, Méknès, Rabat, Casablanca, Tanger, Marrakech, Agadir, Ouarzazate).
- There is no clear/agreed definition of "spa" in Morocco, but the country's Spa Association is working on this definition, which is likely to include body care, relaxation, fitness, and beauty services. The spa industry in Morocco has not fully embraced the concepts of "wellness" and "wellbeing".
- Moroccans have been going to hammams for centuries, but as the spa industry grows they are turning their interest toward spas – especially among wealthy urbanites.
- Morocco's spas are increasingly becoming a key attraction for international tourists. A local industry stakeholder suggests that over 80% of tourists from Europe and the Middle East chose a spa destination when visiting Morocco.

Government Support & Promotion for Medical & Wellness Tourism

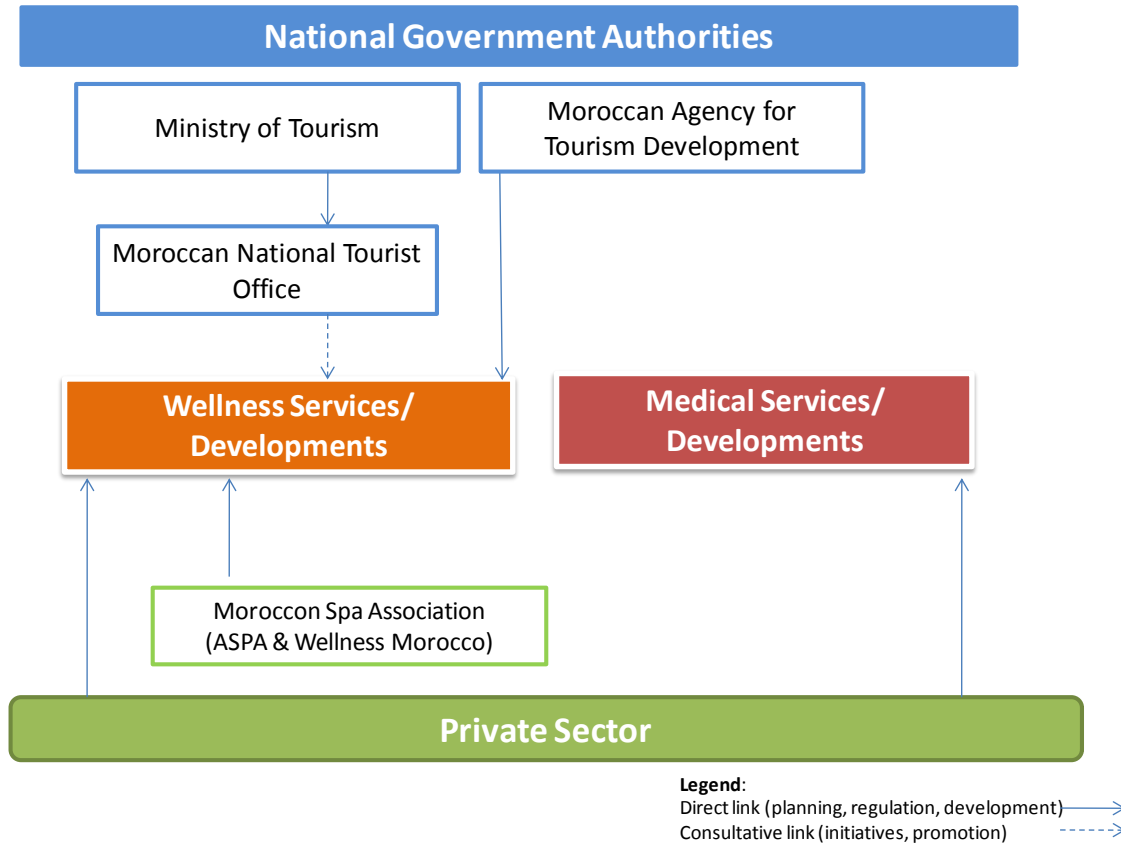
- The Moroccan National Tourism Office actively promotes Moroccan spas as a key wellness tourism product and as one of the country's most popular and important offerings. Promotional strategies include participation in international spa and tourism exhibitions, events, and conferences, especially in Europe and the United States. Emphasis is placed on marketing Morocco as an "authentic spa destination" by offering spa services that take advantage of thermal and sea waters, local products, medicinal and aromatic plants, and other traditions.
- As part of the *Vision 2020* objectives set by King Mohammed VI in 2010 (which set a goal of 20 million tourists by 2020), wellness tourism was identified as a key pillar for the country's tourism development. Specific marketing for the Moroccan spa industry is being implemented as part of this strategy.
- The Moroccan Ministry of Tourism has launched a *National Plan for Health, Wellness, and Medical Tourism Development* in partnership with public and private organizations. Objectives include: creating new integrated health tourism products, corresponding to the needs of different domestic and international market segments; positioning Morocco as a destination for international visitors and competitive flagship health and wellbeing by 2020; and enhancing socioeconomic development and the contribution of tourism to the national economy. The focus over the next decade will be on: creating new spa and wellness centers, thermal stations (so far there are three), sand therapy offerings, balneotherapy centers, and medical tourism entities, as well as on restructuring existing health and wellness centers to meet international quality standards. The aim is to improve Morocco's image for spas and wellness, and to attract new foreign investments in this sector.
- Morocco's spa industry is just starting to organize a relationship with the Ministry of Tourism and other government organizations, especially through associations like the Moroccan Spa Association.

Key National Websites where Medical and Wellness Tourism are Promoted:

Morocco does not promote medical tourism on its national tourism website. "Health & Wellbeing" is promoted on the website under the heading "I Enjoy":

<http://www.visitmorocco.com/index.php/eng/i-enjoy/Health-and-well-being/A-paradise-of-well-being>

Organizational Structure for Medical & Wellness Tourism – Morocco



Ministry of Tourism: Administration, regulation of training, and investment promotion for the Moroccan tourism industry.

Moroccan National Tourist Office: Responsible for promoting and marketing Morocco as a destination within Morocco and abroad.

Moroccan Agency for Tourism Development: Conducts investment promotion for the tourism industry.

Moroccan Spa Association (ASPA & Wellness Morocco): Professional association representing Morocco’s spa industry. Aims include developing the country’s spa industry, elevating the quality of spa services, and promoting Moroccan spas internationally.

Philippines

Population (2011): 101.8 million

International tourist arrivals (2009): 3.0 million

International tourism receipts (2009): US\$2.3 billion

Profile of Medical & Wellness Tourism

- The Philippines began focusing on medical and wellness tourism much later than many other Asian countries and has only been actively pursuing this market for the last 4-5 years. The country has also expanded its focus to include retirement/long-term care as related sectors (an approach that is slightly different from other key players in the medical and wellness tourism markets).
- Key advantages in the Philippines for both medical and wellness tourism include: its large pool of well-trained healthcare professionals, excellent English skills, the innate hospitality of the Filipino people, and the country’s pleasant tropical climate. In spite of these advantages, the country still often has to fight the image among tourists that it is a “Third World” country.
- Key target markets for medical and wellness tourism in the Philippines include the United States, Canada, the Middle East, Japan, and Australia. The millions of Filipino expatriates living overseas are also an important target market.
- Filipino traditional medicine has been practiced for thousands of years, and the centerpiece of this tradition is Hilot (an indigenous therapeutic massage). Other folk healing practices and therapies include herbal medicine, pranic and reiki healing, hypnosis, acupuncture, faith healing, herbal medicine, and reflexology. These folk healing arts and practices have become integrated into the Filipino health system over time, but they are not accepted or accredited by the Department of Health.

Medical Tourism Trends

- Medical services/treatments most in-demand among foreigners visiting the Philippines are: executive check-ups, cardiovascular care, cancer care and stem cell therapy, joint replacement surgery, weight management, eye care and sight restoration, dental care, aesthetic and dermatological surgery, and long-term care/retirement.
- The Dept. of Tourism estimates that there were 100,000 medical tourists to the country in 2008, and it projects that medical tourism will become a US\$3 billion industry in the Philippines by 2015, with 200,000 foreign patients arriving annually.
- In the Central Philippines tourism super-region, there are now 44 hospitals and health facilities accredited for medical tourism by the Department of Health and Department of Tourism.
- The country has 3 JCI-accredited hospitals.

Wellness Tourism Trends

- The spa industry is a core part of the wellness sector in the Philippines, and the country’s government and Spa Association have been active in pushing the spa industry to the forefront of this market.
- A local estimate puts the Filipino wellness tourism market at US\$25.3 million annually, with foreign tourists contributing about two-thirds of these revenues.
- According to local stakeholders, spas and wellness tourism are ahead of medical tourism in terms of promotion in the Philippines.
- Many hospitals in the Philippines also have wellness centers on-site (e.g., for acupuncture, yoga, meditation, nutrition, massage, herbal products). These often provide after-care for medical tourists. The Filipino government has supported these developments by encouraging the medical community to understand and support the healing and preventive aspects of spa and alternative therapies (e.g., by supporting day-long seminars for doctors).

Where Does Spa Fit?

- Hotel/resort spas are the largest category of spas in the Philippines (and largely serve foreign tourists), but the country also has destination spas, day spas, club spas, and a growing number of medical spas.
- Foreign tourists account for about 62% of spa visitors in the Philippines.
- Signature Filipino treatments that are popular in spas and prominently marketed to foreign tourists include Hilot (a therapeutic deep tissue massage) and dagdagay (a traditional foot massage).
- The *Spa Association of the Philippines* was established in 2003, partly to help boost the tourism industry. In 2010, its name changed to *Philippine Wellness and Spa Association* (or PhilWell, <http://philwell.org/>), to reflect the country's efforts to fully embrace the concept of wellness.
- The private sector (working through the Spa Association) has a close working relationship with key government agencies and is working to address issues affecting the industry. Key areas of focus include the following:
 - Dept. of Tourism and Spa Association are working together to establish a spa accreditation process and develop criteria.
 - Dept. of Trade is working on standardizing the Hilot procedure.
- The country's spa industry faces an ongoing issue with protecting its image and controlling the use of the word "spa" for professionally run facilities (to combat problems with massage parlors and saunas that serve as fronts for illicit activities).
- Spas and other wellness activities are increasingly integrated into the medical tourism sector in the Philippines, due in large part to efforts by the government to educate the medical industry about alternative practices/therapies and raise acceptance. Spas are increasingly used for relaxation and recuperation by medical tourists.

Government Support & Promotion for Medical & Wellness Tourism

- The Philippines government started proactively marketing and developing the country's medical and wellness tourism offerings in 2006, when the Departments of Health, Tourism, Foreign Affairs, and Trade & Industry identified the "Health and Wellness Services Program" as one of their flagship initiatives. This program significantly stepped up the promotion of medical tourism, and also has focused on raising quality to conform to international standards. Recently the government has also expanded its focus on retirement tourism and long-term care as a related sector.
- The Philippines has quickly caught up with other major Asian countries in the medical and wellness tourism markets due to the strong support of the government and the active involvement and cooperation of the private sector.
- The *Philippine Medical Tourism Program* (PMTP, <http://philippinemedicaltourism.info/>) (created by Executive Order in 2004) is a public-private initiative aimed at promoting medical tourism (coupled with health and wellness services). PMTP includes both government and private sector representatives who work together to develop four areas: medical and surgical care (hospitals and clinics), traditional and alternative healthcare, health and wellness (incl. spas), and international retirement/long-term care.
- The *Health and Wellness Alliance of the Philippines* (HEAL Philippines) was initiated by the Dept. of Tourism to bring together all the country's key players in medical and wellness tourism: private and public hospitals, spas, wellness destinations, clinics, retirement communities, and support services such as travel agencies and airlines. The organization works to develop and promote medical, wellness, and retirement tourism, and to provide a more seamless delivery of services to tourists.
- The government strongly supports the connections between wellness, spas, and medical tourism, and is working to promote these connections. For example, the Dept. of Tourism is encouraging tour operators to develop medical and wellness tourism packages to cater to foreign tourists, and especially packages that integrate medical and wellness services. A recent Dept. of Tourism promotional campaign – "Island of Wellness" – has focused especially on the promotion of spas and other wellness services.

Key National Websites where Medical and Wellness Tourism are Promoted:

On the Philippines' national tourism website, medical and wellness tourism are listed under the heading "Things To Do."

- Health and wellness: <http://www.experiencephilippines.org/health-wellness-tourism/>
- Medical tourism: <http://www.experiencephilippines.org/medical-tourism/>

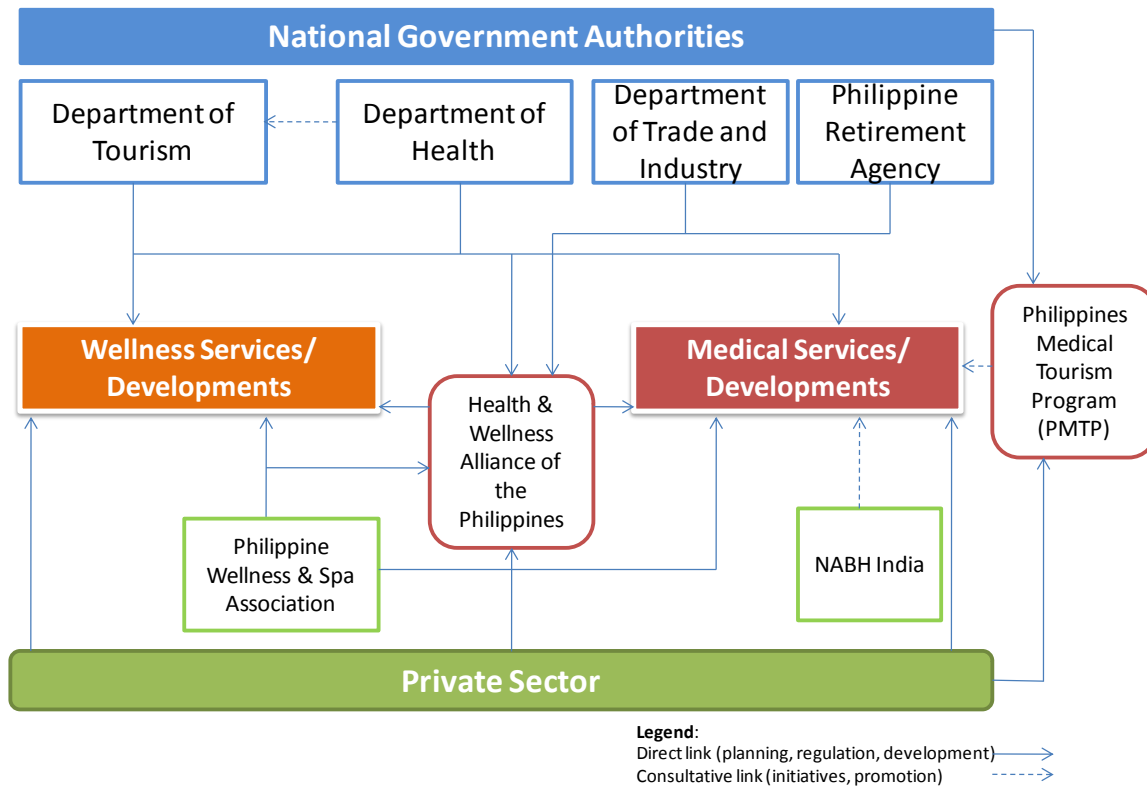
The Department of Tourism website (which appears to be geared more to industry than for promotion) has a more extensive section on "Health and Wellness Tourism" (categorized under "Tourism Strategy"):

- <http://www.tourism.gov.ph/Pages/MedicalTourismPortal.aspx>

Separate public/private websites for medical tourism:

- PMTP partnership website: <http://philippinemedicaltourism.info/>
 - "Heart of Asia" website: <http://www.philippinesheartofasia.ph/> (operated by a private company; relationship between this website and official tourism promotion organizations is unclear)
-

Organizational Structure for Medical & Wellness Tourism – Philippines



Department of Tourism: Responsible for international promotion and tourism industry development.

Department of Health: Responsible for quality, accreditation, and licensing for medical and spa industry.

Department of Trade and Industry: Identifies key industries to be developed and participates in various initiatives

Philippine Retirement Agency (*govt. owned and controlled corporation; falls under Dept. of Tourism*): Mandated to attract foreign nationals and former Filipino citizens to invest, reside and retire in the Philippines; supports medical and wellness tourism promotion initiatives.

Health and Wellness Alliance of the Philippines (HEAL Philippines): Alliance of all key public and private players to support medical, wellness, spa, and retirement tourism.

Philippines Wellness and Spa Association (PhilWell): Established as Spa Association of the Philippines in 2003, recently changed its name.

Philippine Medical Tourism Program (PMTMP): Public-private initiative aimed at promoting medical tourism (coupled with health and wellness services).

National Accreditation Board for Hospitals and Healthcare Providers (NABH): Indian medical care accreditation agency that helps to develop the medical services accreditation system for the Philippines.

South Africa

Population (2011): 49.0 million
International tourist arrivals (2009): 7.0 million
International tourism receipts (2009): US\$7.5 billion

Profile of Medical & Wellness Tourism

- South Africa is increasingly considered to be a leading player in the medical tourism sector (particularly for cosmetic procedures); however, the government has only started focusing on this sector in the last few years.
- South Africa has a good foundation of offerings for wellness tourism and a growing spa sector, but a strong promotional campaign and brand image has not yet been established.

Medical Tourism Trends	Wellness Tourism Trends
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- South Africa is increasingly becoming a major destination for medical tourism.
- The most popular treatment for medical tourists is cosmetic surgery, but the country also provides organ transplants, heart surgery, orthopedic surgery, obesity surgery, dentistry, and fertility treatments.
- Medical costs in South Africa are about 40-60% of those in the U.S./Europe, but South Africa is still relatively more expensive than some leading Asian medical tourism destination countries.
- South Africa’s strength in medical tourism is considered to be the packaging of its tours rather than low costs or strength of doctors/hospitals. Medical tourism is often packaged with safaris (e.g., “scalpel safaris”), recovery in a spa, or with other activities (e.g., sun/ sand). The strong English language skills and “westernized” culture are also a draw for medical tourists.
- A statistic from South Africa’s Deputy Minister of Tourism estimates that there were 410,000 medical tourists to South Africa in 2008 (or 4.3% of all international inbound tourists).
- South Africa does not have any internationally (JCI) accredited hospitals.
- Main source countries for medical tourism to South Africa are European countries (including UK, Germany, Austria, Italy). An increasing number of patients are coming from other African countries (primarily affluent Africans and ex-pat communities living in Africa).
- South Africa has three major private healthcare firms that own/manage hospitals and offer international patient facilitation services: Netcare Group (57 hospitals); Life Healthcare (55 hospitals); and Medi-Clinic Southern Africa (50 hospitals).

- South Africa’s national tourism website promotes the following products under “Health & Wellness”: Vinotherapy, “Unusual facials,” “Massages in the bush,” and “Africa-inspired treatments.”
- Wellness tourism also tends to be closely linked and packaged with outdoor activities in South Africa (e.g., adventure, safari, beaches).
- South Africa has numerous spa resorts that combine spa visits with safaris, golf, wine tasting, and nature-based tourism.
- Vinotherapy is an increasing development in areas with world-famous vineyards and wine routes (e.g., Western Cape), and some spas and wellness centers specialize in these treatments.
- Indigenous plants and traditional African healing rituals are increasingly incorporated into treatments at spas in South Africa.
- Thalassotherapy is also a popular treatment in many spas around South Africa. The country has a number of hot springs (esp. in Western Cape), and several spas and holiday resorts have been built around these springs.
- Spiritual retreats are gaining in popularity and tend to offer alternative therapies, meditation, wellbeing workshops, and spiritual guidance.

Where Does Spa Fit?

- The spa industry in South Africa is relatively new, and most spas are less than ten years old.
- Luxury “safari spas” and “bush spas” are a growing segment, which combine the spa experience with safaris in national parks. Many of these claim to be environmentally friendly.
- South African spas are increasingly offering vinotherapy, hydrotherapy/thalassotherapy, and treatments based on unique African traditions (such as African wood massage or African raindrop treatment) or using local and natural ingredients (e.g., Rooibos). Many South African spas emphasize a connection with nature and the landscape, and there is an increasing emphasis on environmental issues.
- Spas are often included in high-end medical tourism packages, which may include preparation for surgery or recuperation in a spa facility.
- The *South African Spa Association* (<http://www.saspaassociation.co.za/>) was established in 2009.

Government Support & Promotion for Medical & Wellness Tourism

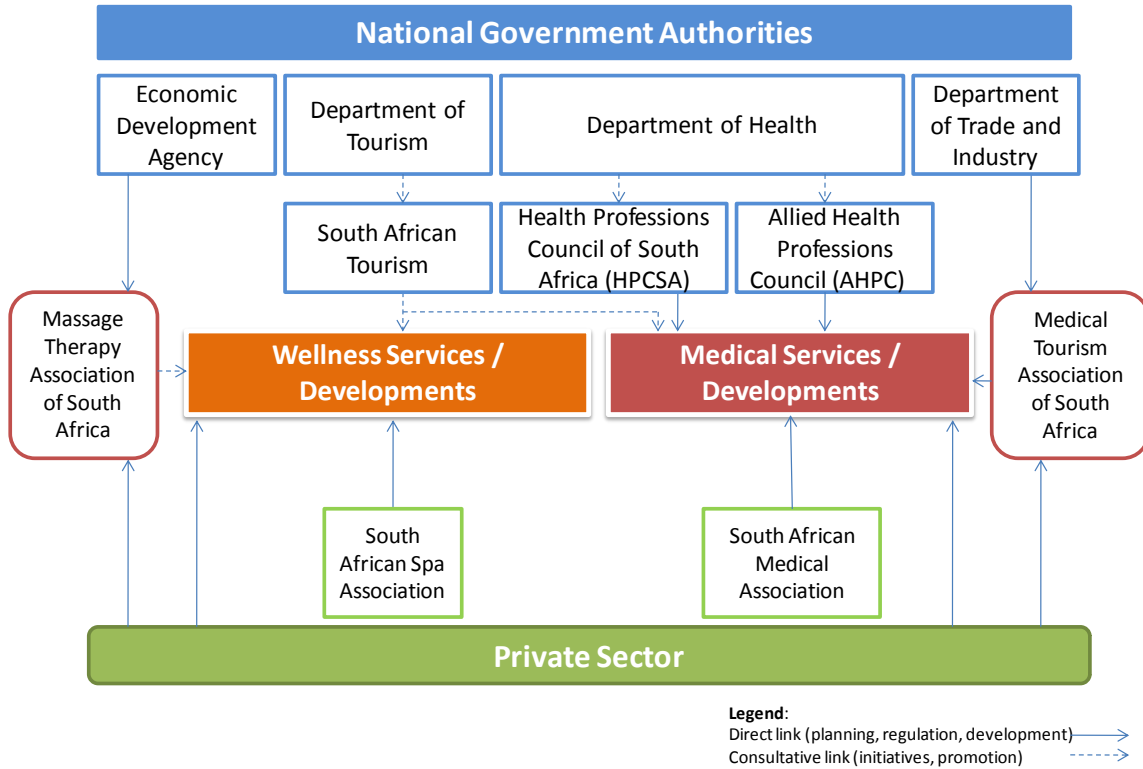
- In 2009, the South African government stated that it was developing a national strategy for medical tourism, to promote South Africa as a cost-effective international destination. This strategy assessed the market and industry supply chain, as well as the policies that need to be addressed in order to establish better standards and regulations.
- The first inaugural South Africa Health Tourism Congress was held in July 2009 (supported by the national Departments of Tourism and Health), with 300 delegates ranging from hospitals, insurance, government, etc. The aim was to stimulate the inbound health tourism market in South Africa (primarily focusing on medical tourism) and to foster greater cooperation in the sector.
- Following the Health Tourism Congress, it was decided that the industry should organize itself into an association and establish guidelines and codes of conduct, and the non-profit *Medical Tourism Association of South Africa* (<http://www.medicaltourismassociation.org.za/>) was established. Another motivation for the formation of this body was that South Africa’s Department of Trade and Industry will not fund an industry without a trade association being in place.
- The *South African Medical Association* is working with the Department of Health to create a Code of Practice for those involved in medical tourism, as well as guidelines for medical malpractice insurance coverage.

Key National Websites where Medical and Wellness Tourism are Promoted:

South Africa does not promote medical tourism on its national tourism website. Promotion for wellness tourism (and spas) is generally buried one or two layers into the national tourism website:

- U.S. and UK mirror sites: “Health & Wellness” is buried several layers into the website, under the heading “What to Do” / “The Urban Vibe”: <http://www.southafrica.net/sat/content/en/us/us-health-and-wellness>
- German mirror site – same structure as above: <http://www.southafrica.net/sat/content/de/de/germany-health-and-wellness>
- South Africa mirror site – “Health & Wellness” is listed under the heading “What to Do”: <http://www.southafrica.net/sat/content/en/za/health-wellness>

Organizational Structure for Medical & Wellness Tourism – South Africa



Department of Tourism: Regulation and administration for the tourism industry.

South African Tourism: Promotes tourism domestically and internationally and provides knowledge sharing for the industry.

Department of Health: Oversees all health/medical matters in South Africa.

Health Professions Council of South Africa (HPCSA): Supervisory body of medical professions.

Allied Health Professions Council (AHPC): Recognizes and regulates 11 allied health professions – Chiropractic, Osteopathy, Homeopathy, Naturopathy, Phytopathy, Aromatherapy, Massage therapy, Reflexology, Ayurveda, Unani Tibb, and Acupuncture (making South Africa one of the few countries that regulates and recognizes complementary therapies).

Medical Tourism Association of South Africa: Seeks to facilitate the positioning of South Africa as a premier medical/health/wellness tourist destination through marketing and dialogue. Membership is open to all entities involved in medical tourism in the country (e.g., tour agencies, hospitals/clinics, doctors/dentists, medical associations, health insurers, wellness centers, auxiliary medical services). The Association received a grant from the Economic Development Agency for the development of an association web portal (which is currently under development).

Massage Therapy Association of South Africa: Professional body representing the interests of therapeutic massage therapists. Has developed standards and codes of practice/conduct; successfully lobbied for the registration of Therapeutic Massage Therapy as a statutory recognized profession; and works to raise the profile of massage therapy among health professions, the government, and the public.

South African Spa Association: Created in 2007 to represent the spa industry in South Africa (including registered health and skincare professionals, licensed healthcare professionals, spa owners, spa consultants, spa facility designers, product manufacturers).

South African Medical Association: Professional body representing registered medical specialists and doctors.

Thailand

Population (2011): 66.7 million

International tourist arrivals (2009): 14.1 million

International tourism receipts (2009): US\$15.9 billion

Profile of Medical & Wellness Tourism

- Thailand is known as a center of ancient healing traditions and techniques, ranging from Thai massage to meditation, herbal medicine, and other holistic practices. Many of these traditions have evolved from folk knowledge and other Asian therapies, such as Indian Ayurveda and Chinese traditional practices.
- Thailand is typically considered to be a leading country for both medical tourism and spa/wellness tourism. Interestingly, the country's healing traditions have not always been well-linked with its medical and spa/wellness tourism product (at least from a promotional standpoint) – other than a visitor possibly getting a Thai massage while visiting a spa or resort. This is changing, however, as consumer interest in the country's healing traditions and mind-body-spirit practices grows, and as spas, resorts, and wellness retreats increasingly emphasize offering an “authentic Thai experience.”
- Both wellness and medical tourism are dominated by international tourists in Thailand. Traditional therapies such as Thai massage and acupuncture are widely available to locals (and even performed in the home), so local citizens do not typically travel within the country for medical or wellness purposes.

Medical Tourism Trends

- Thailand is one of the most popular and successful countries for inbound medical tourism. The Tourism Authority of Thailand claims that the country holds a 38% stake in the world's medical tourism market.
- Thailand's medical tourism services have won international acclaim especially in the realm of tropical and infectious diseases, cardiac surgery and post-operative care, cosmetic and reconstructive surgery, dentistry, treatment of bone-related ailments, and cataracts.
- Medical tourists tend to choose Thailand because of the cost-saving on treatments (e.g., 25% of the price of a treatment in the U.S./Europe). Thailand's tourism infrastructure is excellent; doctors are well-qualified, and many speak good English.
- Bangkok is the main hub for medical tourism, with Bangkok General and Bumrungrad hospitals receiving the most international patients per year (with an est. 150,000 and 400,000 patients, respectively).
- Approximately 30 hospitals in the country cater to medical tourists, and there are 14 hospitals accredited by JCI.
- Thailand claims to receive from 1.0-1.5 million medical tourists annually (but the source of these statistics is unknown).
- Thailand's medical tourists primarily come from other Asian countries, the Middle East, United States, Western Europe, and Australia.

Wellness Tourism Trends

- Wellness tourism in Thailand is primarily motivated by relaxation and pampering (visits to resorts and spas), rather than well-being. Wellness tourism is primarily linked with the spa industry in the country's promotional approach.
- Many luxury spas and wellness retreats have been developed in recent years and attract international tourists. These can range from exclusive locations with a whole menu of relaxing and pampering facilities, to simple beachside resorts offering yoga.
- Thai holistic and healing practices are becoming increasingly popular with international tourists, who typically visit a holistic retreat or one of the country's many resort, hotel, or destination spas.
- Thai massage can be experienced by international tourists in a large number of places throughout Thailand (and has become a standard offering in spas around the world).
- Meditation retreats can be found all over Thailand, but are often located away from mass tourism destinations and in quieter rural areas (for example in the northeast). There are several meditation retreats and temples that allow visitors to experience Buddhist traditions firsthand.

Where Does Spa Fit?

- The spa concept was quite new to Thailand until 1993, when the Bangkok Mandarin Oriental Hotel opened its first spa, but the industry has been growing rapidly since that time. The country's early spas tended to be located in 5-star hotels and resorts only, and the first destination spa (Chiva Som) opened about 15 years ago.
- Thailand now has a large and growing number of hotel, resort, and destination spas, many of which are ranked world class. Most tourists who visit these spas are foreign.
- The best known spa treatment is the Thai massage, which is now being exported all over the world.
- Apart from Bangkok, many of the country's newest spa developments have been located by the beaches, especially in Phuket, Ko Samui, Hua Hin, and Koh Phangan. Spa treatments in the northern city of Chiang Mai, however, tend to be cheaper, and there is a wide range of spa venues to choose from.
- There is a growing emphasis in the Thai spa industry on the mind and wellness. One innovative development in Thailand's spa industry is the development of the world's first cultural spa (Sukko Cultural Sap & Wellness in Phuket), which provides packages based on the philosophy of Thai Ayurveda, as well as martial arts, exercise, and cuisine.
- The spa industry is not yet well connected to the medical industry in Thailand (and especially between spas and hospitals serving medical tourists), but the link is starting to get stronger, especially for preventative and recuperative care. Some destination spas are starting to cater their offerings to medical tourists.

Government Support & Promotion for Medical & Wellness Tourism

- Thailand was one of the first Asian countries to promote medical tourism, beginning in the 1990s.
- The Thai government is strongly focused on the potential of the medical and wellness tourism sectors and has been fast-tracking the development of healthcare and health-related services.
- The Ministry of Public Health and the Ministry of Commerce work together to firmly establish Thailand's leadership position as the "Health Tourism Hub of Asia" and the "Wellness Capital of Asia." They have also been working to promote the increased export of Thai herbs and herbal remedies, following on the increasing popularity and export of the "Thai spa" concept.
- The main destinations targeted for the development of medical, wellness, and health tourism are Bangkok, Chiang Mai, Phuket, and Samui.
- In 2004, the Ministry of Public Health (MOPH) started developing guidelines and specific standards for the Thai spa industry (which was previously unregulated). This included setting quality benchmarks based on global standards, and it lifted the bar for the country's spas, traditional Thai massage, and long-stay healthcare products and services. The government has worked jointly with private sector operators and the Thai Spa Association to develop and enforce standards for the Thai spa industry. All spas have to register with the Medical Registration Department of the Ministry (or a Provincial Health Office for upcountry areas), in order to maintain the high standards of the industry. Spa therapists must all be certified to work in a spa.
- The Ministry of Public Health has been working with Thai Airways International and the Thai Spa Association on a promotional campaign called "Visit Thailand Visit Thai Spa," targeting the airline's passengers.

Key National Websites where Medical and Wellness Tourism are Promoted:

Thailand does not prominently promote medical or wellness tourism on its primary national tourism website. Both are buried several layers into the website, under the heading “Activities”:

- Medical Tourism: <http://www.tourismthailand.org/see-do/activities/medical-tourism/>
- Spa and Wellness Tourism: <http://www.tourismthailand.org/what-to-see-do/activities/spa-and-wellness/>

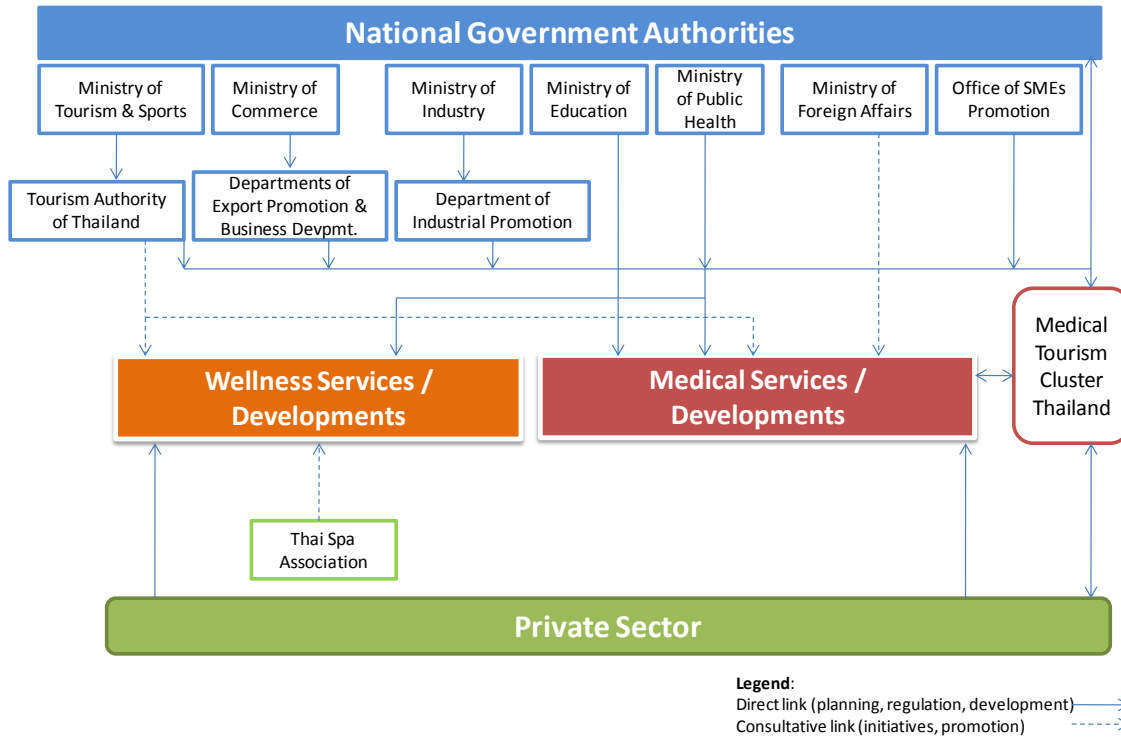
The Tourism Authority of Thailand (TAT) operates an entirely separate website to promote medical tourism:

- <http://www.thailandmedtourism.com/>

TAT also operates a number of mirror websites promoting tourism in specific regions and countries around the world, and a number of these websites promote spa and wellness tourism more prominently:

- Middle East website: http://tourismthailand-middleeast.org/tourism.php?page_id=18
 - Australia website: <http://thailand.net.au/relaxation>
 - India website: http://www.amazingthailand.co.in/visiting_thiland/spa_wellness.aspx
 - Germany website: <http://www.thailandtourismus.de/urlaub/besondere-attraktionen/spa-wellness.html>
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Organizational Structure for Medical & Wellness Tourism – Thailand



Tourism Authority of Thailand (TAT) (falls under Ministry of Tourism & Sports): National body responsible for promoting tourism in Thailand.

Departments of Export Promotion (DEP) and Business Development (DBD) (fall under Ministry of Commerce): DEP’s mission is (1) to expand markets for Thai export products and services; (2) to develop and create added value for Thai export products and services; (3) to provide international trade information services; (4) to increase the competitiveness of Thai exporters. DBD’s duties include: business development, promotion, registration, promotion of trade associations and chambers, promotion of service and e-commerce businesses.

Department of Industrial Promotion (falls under Ministry of Industry): Supports new enterprises and job creation and promotes and develops industries, especially small and medium-sized enterprises (SMEs) and community-based industries, to compete in the global market.

Ministry of Education: Responsible for the supervision of educational programs, including medical education and spa training.

Ministry of Public Health (MOPH): Oversees quality standards and regulation in both medical and wellness tourism, including spas. Also seems to be loosely involved in promotional activities, although this is not one of its official functions.

Office of SMEs Promotion (OSMEP): Acts as a central planning office and coordinates the action plans of all relevant offices in promoting SMEs in Thailand. OSMEP’s role is thus to promote and, when appropriate, re-implement certain promotional activities in order to enhance SME potential.

Thai Spa Association: Represents the Thai spa industry and supports initiatives in promotion, training of therapists, etc.

Medical Tourism Cluster Thailand: Represents and promotes the medical tourism sector and facilitates foreigners seeking medical services in Thailand. Membership consists of hospitals/clinics, hotels and recuperation facilities, health travel planners, doctors, nurses, ambulance service providers, spa operators, and other downstream supporting businesses.

Other Emerging Concepts, Products, and Regional Initiatives Related to Wellness Tourism and Medical Tourism

In addition to the 12 detailed country case studies summarized above, the research team also compiled brief information about a number of concepts, products, and initiatives being developed around the world that are closely linked with medical tourism and wellness tourism developments. Many of these were identified through the secondary research undertaken for the case study analysis, but were also drawn from the predictions for the next 5-10 years as outlined by interviewees. The trends include the following (and are described in more detail below):

- **Regional Initiatives.** There are a number of regional developments and initiatives, especially related to wellness tourism, that are mainly based on marketing and branding. These initiatives tend to bring together countries that have similar features and resources, on a voluntary basis, to share ideas, develop new products, and engage in joint promotion. This approach has worked especially well for the *Alpine Wellness* initiative, which also functions as a quality management tool. The *Nordic Wellbeing* label is helping to raise the profile of wellness tourism in the Scandinavian and Nordic countries, and the Caribbean islands have also started to work together to develop wellness tourism regionally. There are also some initiatives that are based on joint natural resources (e.g. seas, mountains), where countries come together to discuss how they can best use those resources. For example, there is a revival of interest in thalassotherapy in Europe and an emergent interest in Asia.
- **Holistic/Integrated Lifestyle-Oriented Tourism Concepts and Products.** Much of the research conducted for this study confirmed that there is a shift toward a more integrated approach to wellness, and that this kind of shift is also starting to occur (more slowly) in the medical tourism market, particularly in countries where holistic approaches to medicine have traditionally been used (e.g. Thailand, India, and other Asian countries). Body-mind-spirit balance is nothing new for Asians, but for many Westerners, it is something of a revelation. As a result, new products are being developed that cater to the needs of those seeking a more balanced life and lifestyle. This includes holistic retreats and spas, as well as wellness centers, which help people to understand healthy living, nutrition, relaxation, stress management, work-life balance, anti-aging, and longevity. As many Westerners are starting to lose faith in their national medical systems, there is also a growing attraction to alternative and complementary therapies and traditional medicine, much of which comes from Asia (e.g. Traditional Chinese Medicine, Ayurveda).
- **Active Holiday Concepts and Products.** There is a growing interest in active holidays, which are increasingly being combined with wellness tourism (and occasionally medical tourism as well, if exercise is recommended by a medical practitioner). Indeed, in many parts of the world (e.g. Nordic countries, Canada), there is an inextricable link between wellness and outdoor recreation such as hiking. Some countries are clearly using their landscapes to attract tourists and are using them as a selling point for spas (e.g., South Africa, South American countries). Active holidays can include sports and adventure tourism, where tourists are active during the daytime and

relax in a spa in the evenings. Hence, the growing popularity of adventure spas, which provide exactly that opportunity. Although most spa resorts already offer some form of sports or fitness facilities, there is a small but growing segment of tourists who specifically want to get fit or engage in some form of adventure rather than being a “passive” spa visitor.

- **Sustainable and Eco-Friendly Tourism Concepts and Products.** The tourism industry has started focusing on issues of sustainability over the last decade or two, but the debate is ongoing as to how to develop eco-friendly products and destinations for tourists. This debate has been extended to wellness tourism and medical tourism, as the health of the planet is increasingly seen as being related to personal health, and as spas and resorts consider how best to “go green.” Some consumers are starting to make choices based on their carbon footprint and might consequently be less inclined to travel long-haul, and will also try to consume local products and services wherever possible. Tourists will be increasingly likely to choose destinations that respect the local environment, its wildlife, and human communities. “Slow” and organic food and natural and mineral cosmetics are also becoming increasingly popular.

Regional Initiatives

Nordic Wellbeing. The concept of Nordic Wellbeing was first developed by Julie Lindahl, a Swedish Wellness Expert and author of the book *On My Swedish Island: Discovering the Secrets of Scandinavian Well-being*. Lindahl describes how Nordic Wellbeing focuses on five lifestyle areas: design, food, gardens and herbs, outdoor life, and relaxation. Recommended activities include: fitness and nature meditation; gathering and preparing food from nature; detoxing and relaxation techniques including sauna, herbal baths, and massage; and a quiet opportunity to write paint or do needlework in an inspirational natural environment. This movement has gradually expanded across Scandinavia and the Nordic countries (Sweden, Denmark, Norway, Finland, and Iceland) and is being used as a branding tool for wellness activities that are typical of this region. These include: the combination of hot and cold experiences (e.g., saunas in Finland or hot geysers in Iceland followed by ice cold lakes or snow); outdoor recreation (e.g., Nordic walking, hiking in forests, cross-country skiing, lake bathing); healthy fresh cuisine (e.g., berries, mushrooms, oats, fish, rye); and architecture and design (e.g., light, space, natural materials). The term *wellbeing* is preferred in Nordic countries to the term *wellness*, because wellness tends to be associated with luxury. Nordic people often prefer rural, nature-based recreation to time spent being pampered and beauty treatments in luxury hotels. For more information, see: <http://www.nordicwellbeing.com/>.

Alpine Wellness. The Alpine Wellness brand is managed by Alpine Wellness International (AWI) GmbH. It includes hotels and resorts in Bavaria (Germany), Austria, and Switzerland. The aim of the initiative is to develop a quality product based on Alpine character and resources, such as altitude, climate, Alpine materials in the architecture and interior furnishings, alpine cuisine, and the rediscovery of Alpine healing formulae. There are several sub-brands of Alpine Wellness, which include: Alpine Relaxing (e.g., nature, landscape, hay baths, saunas); Alpine Fitness (e.g., outdoor activities); Alpine Health (e.g., treatments for allergies, asthma, burn-out, spinal problems); and

Alpine Character (e.g., architecture, furnishings, decor, cuisine). The criteria for becoming and remaining a member of this quality cluster are based on: altitude (1,200m or more), views of mountains and nature, peacefulness, low pollution, cuisine (e.g., nutritious, regional or local, seasonal), exercise and relaxation (e.g., cycling, running, meditation), Alpine-specific knowledge (e.g., healing, customs, traditions), and local treatments (e.g., hay baths, massage with local oils/creams, farmhouse sauna). For more information, see: <http://www.alpinewellness.com/en/>.

Caribbean Wellness Tourism. The Caribbean Export Development Agency (“Caribbean Export”) has collaborated with the Caribbean Spa and Wellness Association (C-SWA) on a project to strategically assist the 15 CARIFORUM member countries (Grenada, Antigua & Barbuda, Barbados, Dominica, Belize, Dominican Republic, Guyana, Haiti, Jamaica, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, Suriname, the Bahamas, and Trinidad & Tobago) in developing and promoting health and wellness tourism. The project began in 2010 and focuses on: (1) market research and strategy development; (2) marketing and promotion; and (3) standards development.⁵⁷

The Caribbean region has hosted many conferences on wellness, health, and medical tourism in the past three or four years, and regional momentum is building for greater investment and coordination at the highest levels, in order to fully take advantage of the opportunity. There are already a number of well-established wellness tourism venues in the region including: Le Sport in St. Lucia, Rainforest Paradise in Dominica, and Crossroads Center in Antigua. Barbados has a fertility clinic and wants to develop more spas. Cuba has a long-standing reputation as a medical tourism destination. The *Latin Caribe Wellness Network* (<http://www.latinaribewellnessnetwork.com>) has been working hard to establish medical and wellness tourism in Jamaica, especially medical, dental, wellness, fitness, spa, and thalassotherapy tourism.

Marine Medical Tourism or Thalassotherapy. There appears to have been a revival of thalassotherapy, or what is called “Marine Medical Tourism” in some parts of the world, such as Asia. For example, the Korean government is committing considerable funding to research deep water-based wellness. There are also several new facilities in Japan.

In Europe, the revival of thalassotherapy seems to be developing in parallel with the regeneration of many seaside resorts and the shift back to health and wellness tourism from sun-sea-sand tourism (which has declined somewhat because of skin cancer risks, and many seaside destinations have also stagnated because of environmental damage and other forms of degradation). The second International Thalasso Congress (April 3-5, 2008), organized by the European Spas Association, encouraged tourism players in seaside spas and resorts to start providing thalassotherapy again and to highlight the various ways in which it can be applied. The new Premium Europe Thalasso award,

⁵⁷ For more information, see: <http://www.carib-export.com/section.php?Sec=15&SSec=33&Info=107>; <http://www.carib-export.com/section.php?Sec=15&SSec=33&Info=361>; <http://www.carib-export.com/section.php?Sec=15&SSec=33&Info=156>; <http://www.grenadaworld.com/NewsAnnouncements/tabid/58/articleType/ArticleView/articleId/46/Caribbean-Export-Teams-with-Caribbean-Spa-and-Wellness-Association-in-Promoting-Health-and-Wellness-Tourism.aspx>.

designed to maintain very high standards of quality at seaside spas and resorts, was presented by the European Spas Association during the 2008 congress.⁵⁸

Holistic/Integrated Lifestyle-Oriented Tourism Concepts and Products

Holistic Retreats. A holistic retreat may be defined as a purpose-built center that accommodates its guests for the purpose of undertaking body-mind-spirit activities (e.g., yoga, meditation), and perhaps also receiving complementary therapies or treatments while there. Group programming of classes is the norm. A retreat will usually have no other type of tourism/visitor activity besides that of a holistic nature (i.e., it is different from a spa and usually offers no spa treatments except perhaps optional massage). The average number of visitors at any one time in a holistic retreat tends to be 10-15. Some retreats offer many different courses to participants, with a growing emphasis on emotional and psychological workshops (e.g., life-coaching, stress management, neuro-linguistic programming, transactional analysis). A number of creative and expressive courses are also offered, such as dance, drama, singing, and painting. The main idea is usually to balance all of the domains of wellness during one holiday (i.e., physical, intellectual, emotional, spiritual). However, some retreats have a specific focus, such as yoga, meditation, detox, or spirituality.

Websites like *Retreats Online* (<http://www.retreatsonline.com>) register more than 2,000 retreats worldwide, which are categorized according to focus (e.g., weight loss, fasting, stress management, burnout, etc). Holistic retreats can be found all over the world, but there is a larger than average concentration in countries such as the United States, United Kingdom, Australia, New Zealand, Germany, and the Netherlands. This is partly a result of the growing loss of faith in conventional medicine and a move towards more complementary and alternative therapies in these parts of the world. The decline of organized religion in these countries also means that many people are turning to alternative forms of spirituality, which holistic retreats can partially provide. One of the best known and oldest examples of a holistic retreat is Skyros (<http://www.skyros.com>), which was founded in 1979 and now runs retreats in Greece, Thailand, the United Kingdom, and Cuba.

Wellness and Holistic Cruises. One of the most recent products in tourism is the development of wellness or holistic cruises. Many of these depart from American ports and tend to cruise the Caribbean, while some cruise the Mediterranean.⁵⁹ The facilities on board include: spas, saunas, steam baths, massage rooms, beauty salons, healthy and organic food, yoga, meditation classes, and a variety of specialist lectures and workshops.

Longevity Centers. Although longevity centers are not usually used by tourists at present, this is a growing trend that is closely linked to anti-aging, a very topical issue for spas and wellness facilities. Already several spas and fitness centers are using the label “longevity.” The main emphasis is on providing quality of life for citizens as they grow older and on maintaining physical, mental, and

⁵⁸ For more information, see: http://www.espa-ehv.com/index.php?option=com_content&view=article&id=188&Itemid=299.

⁵⁹ For examples of such cruises, see: Holistic Holiday at Sea (<http://www.atasteofhealth.org>) or Costa Cruise (http://www.costacruise.com/usa/wellness_spa_holidays.html).

emotional health. Offerings may relate to fitness and mobility, healthy eating, weight loss, and skin care, as well as dealing with specific medical conditions. It is predicted that people in the future will travel in order to learn how to prolong their life and the quality of their life. This trend is mainly taking place in the United States and the United Kingdom at the moment, but countries where life expectancy is long and quality of life is good in old age are likely to become the most popular (e.g., Japan, Scandinavia).⁶⁰

Nutritional Retreats. There are numerous retreat centers that now offer special dietary programs, not only vegetarian but also vegan, organic, “live,” and raw food. *Raw Food Planet* (<http://www.rawfoodplanet.com/>) lists over 70 ashrams and spiritual centers around the world offering raw food or special dietary holidays. Typical programs include: fasting, meditation, yoga, as well as some creative activities. Weight loss and detox retreats and holidays continue to grow in popularity. Detox holidays seem to take place in more and more exotic locations and typically include detoxifying and cleansing treatments such as: special diets, colonic hydrotherapy, lymphatic drainage, scrubs, massage, yoga, and meditation.⁶¹

Active Holiday Concepts and Products

Sports Tourism. Sports tourism can include many forms of activity, but the most relevant for wellness tourism are those where the tourist is active rather than passive – that is, not merely a spectator. Tourists may engage in one sport only on holiday (e.g., skiing, golf, diving), or may engage in multiple activities (e.g. fitness programs, adventure sports). Some forms of sport may also serve as a secondary motivation for going to a destination, such as swimming, tennis, cycling, walking, or going to the gym. These forms of activity are perhaps the most common in wellness hotels and resorts and are frequently offered as subsidiary attractions to a spa. However, it is becoming more popular to combine a sports-oriented holiday with a spa and wellness break, especially in the case of skiing or golf holidays. Some spa resorts even specialize in sports tourism, and tourists may go there with the primary aim of getting fit.

Adventure Spas. Adventure spas are growing in popularity. They are predominantly marketed for people who want a healthy but active holiday, and who prefer to combine activities with relaxation. Labels such as “rugged relaxation” may be used for marketing purposes. It is typical that visitors will enjoy outdoor fitness and sports activities by day (e.g., hiking, biking, rock climbing, kayaking) and relaxation and pampering by night (e.g., saunas, massages, and other spa treatments). There may also be yoga classes, meditation, lifestyle courses, etc. Healthy gourmet cuisine is usually another feature. Typical locations for adventure spas include: Central and South America (due to the

⁶⁰ For examples, see: Longevity Centres of America (<http://www.longevitycentres.com>) and International Longevity Centre UK (<http://www.ilcuk.org.uk/>).

⁶¹ For example, *Wellbeing Escapes* lists several detox holidays, many of which take place in spa resorts in Asia (<http://www.wellbeingescapes.co.uk/spa-holidays/55-detox-holidays.html>).

dramatic landscape and outdoor possibilities), United States, Canada, Australia, New Zealand, and some parts of Africa such as Kenya or South Africa.⁶²

Sustainable and Eco-Friendly Tourism Concepts and Products

Lifestyles of Health and Sustainability (LOHAS). The Lifestyles of Health and Sustainability (“LOHAS”) concept describes an estimated US\$290 billion U.S. marketplace for goods and services focused on health, the environment, social justice, personal development, and sustainable living. The consumers attracted to this market represent a sizable group in the United States, with approximately 19% percent of U.S. adults (or 41 million people) currently considered to be “LOHAS Consumers.” Wellness is an integral part of LOHAS. Many who are LOHAS consumers typically practice some sort of wellness in their lives, such as yoga, meditation, acupuncture, or massage. Most LOHAS consumers are women (60%). LOHAS tourists will tend to look for destinations and resorts that are sustainable and “eco” (i.e., in harmony with the environment, its wildlife, and human communities). They will desire organic foods and cosmetics, body-mind-spirit products, and integrative healthcare. Companies that attend LOHAS Forums include spas and hotels that have a wellness offering. They come to learn various methods of communications strategy, new product insights, and collaboration with others. For more information, see: <http://www.lohas.com>.

Eco-Spas. One important trend in wellness tourism is the development of eco-spas.⁶³ Eco-spas are usually located in attractive natural landscapes that are designed and built in harmony with the surroundings, using local and sustainable materials. Some eco-spas are even temporary and are dismantled at the end of the tourist season leaving no trace. Networks such as *Ecospas* (<http://www.ecospas.com>) provide guidelines and support for those spas who want to become more environmentally-friendly or green. Examples of eco initiatives might include: limiting and recycling water; using local and seasonal produce for cuisine; respecting indigenous and tribal communities and traditions; using cosmetics not tested on animals; and protecting wildlife. One of the challenges with this new trend is the abuse of the “eco” label, with many spas claiming to be eco-spas but not following adequate guidelines. Eco-spas can technically be located anywhere if they are environmentally-friendly, but it is most common to find them in beautiful landscapes such as the rainforests of Central America, the outback of Australia, or the bush in Africa.

⁶² For examples, see *SpaFinder's* listing of Adventure Spas (<http://www.spafinder.com/all-spas/Adventure-Lovers/N=22002>).

⁶³ For examples, see *SpaFinder's* listing of more than 80 eco spas (<http://www.spafinder.com/all-spas/N=0&keywords=eco+spa&location=&locid=>)

Part III:
Spa Industry Survey on
Wellness Tourism and Medical Tourism

Part III: Spa Industry Survey on Wellness Tourism and Medical Tourism

The research team for this study, in partnership with GSS, developed an online survey that was distributed to Global Spa Summit members and delegates around the world. The survey queried industry members about their views on and understanding of medical tourism and wellness tourism, and especially how these sectors relate to and present opportunities for the global spa industry.

Wellness Tourism and Medical Tourism Survey Methodology

Global spa industry leaders and stakeholders were invited to participate in an online survey through an email invitation that was distributed via the Global Spa Summit membership database. Due to the nature of the distribution mechanisms the research team had access to, this survey was not designed to be a scientific or representative survey – it utilized a convenience sampling technique, and the results cannot be assumed to be representative of the entire spa industry. This kind of sampling technique is useful and valid in conducting an exploratory or pilot study, with the goal of collecting basic data and trends information. However, its drawback is that certain populations are underrepresented in the survey sample – for example, the responses for this survey were heavily weighted toward North America, and to a lesser extent Europe and Asia, while responses from Latin America, Middle East, and Africa were underrepresented.

The survey collected 206 responses, with North America (103), Europe (44), and Asia-Pacific (42) accounting for the vast majority of results. Most of the survey results in this section will be presented for the aggregate set of responses, but where interesting and relevant, variations in responses across these three regions will also be highlighted.

Spa Industry Survey Respondents			
Region	# of Responses	Business Type	# of Responses
North America	103	Day Spa/Club Spa	44
Europe	44	Spa Consulting	36
Asia-Pacific	42	Resort/Hotel spa	31
Middle East & Africa	10	Spa Products	16
Latin America-Caribbean	7	Spa Education	13
		Spa Equipment & Supplies	10
		Medical Spa	8
		Spa Media	8
		Spa Association	7
		Destination Spa	6
		Other	27
Total Responses = 206			

A. Spa Industry Understanding of Wellness Tourism & Medical Tourism

Survey respondents were asked to define the terms “medical tourism,” “wellness tourism,” and “health tourism” in open-ended questions, using their own words. To synthesize and interpret the responses, the answers from each group were compiled and run through visualization software to create a “word cloud.” In a word cloud graphic the size of a word indicates the frequency with which it was used in the survey responses. As a result, commonly used words float to the front of one’s field of vision.

In the three graphics on the following page (see *Figures 1, 2, 3*), note the words that jump out (meaning that they were used most frequently in respondents’ definitions):

- **For medical tourism:** Words that stand out the most include “procedures,” “surgery,” “health,” “care,” and “treatments.”
- **For wellness tourism:** The words “health” and “spa” stand out the most, followed by the words “services,” “destination,” “relaxation,” “treatments,” “medical,” and “programs.”
- **For health tourism:** The words “medical” and “wellness” are equally predominant, indicating that respondents generally associate health tourism with both terms. Words that stand out as secondary in importance include: “treatments,” “spa,” “healthy,” and “improve.”

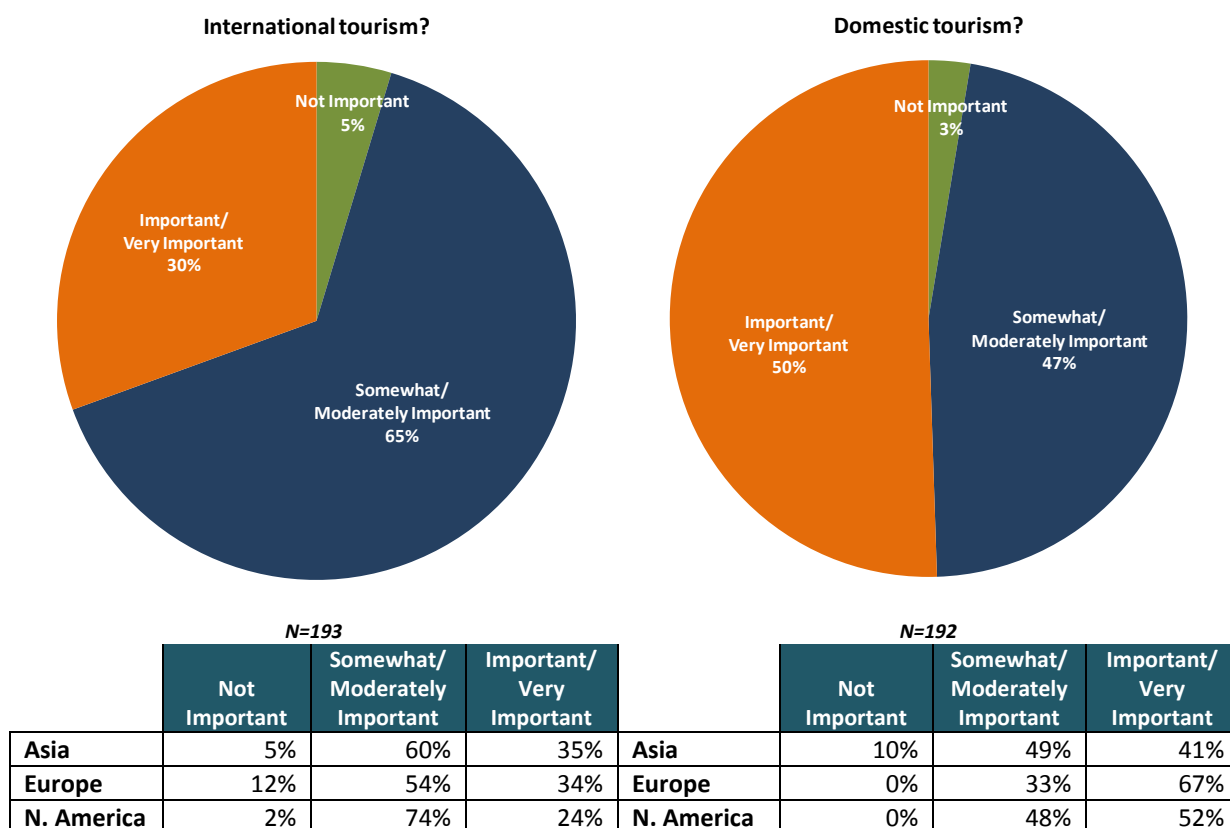
It is also significant to note that, for the questions about the definitions of medical tourism and wellness tourism, approximately one-quarter of all survey respondents left these questions blank, answered “don’t know,” or said that the terms are not defined in their country. For the question about health tourism, over two-thirds of survey respondents left the question blank or answered “don’t know.” Respondents’ inability to answer these questions would indicate that there is a relatively high level of confusion or lack of knowledge in the spa industry about how these three terms are defined – especially for the term “health tourism.”

B. The Role of Spas in Tourism Overall

Overall, the industry feels that spas play an important role in tourism, and their role is stronger for domestic tourism than for international tourism.

To set a baseline for other more specific questions about spas’ role in medical and wellness tourism, the survey first asked a general question about the role that spas play in tourism overall.⁶⁴ In terms of *international/inbound tourism*, approximately one-third of respondents stated that the spa industry plays an “Important” or “Very Important” role in their country (i.e., people travel to the country specifically to visit spas), while about two-thirds said that the spa industry plays a “Somewhat” or “Moderately Important” role in their country (i.e., tourists might go to a spa while they are in the country, but it is not usually the primary reason for their trip). The industry feels that spas play an even greater role in the *domestic tourism* market than they do in international tourism. Half of respondents stated that spas play an “Important” or “Very Important” role in domestic tourism in their country (i.e., people travel within the country specifically to visit spas).

Figure 6: In your country, what role do spas play in:



⁶⁴ Note that the survey did not ask respondents to provide their own definition of the term “spa.” Therefore, respondents’ interpretations of what “spa” is may vary, and this may influence their views on the role that “spa” plays in tourism.

C. The Role of Spas in Wellness Tourism & Medical Tourism

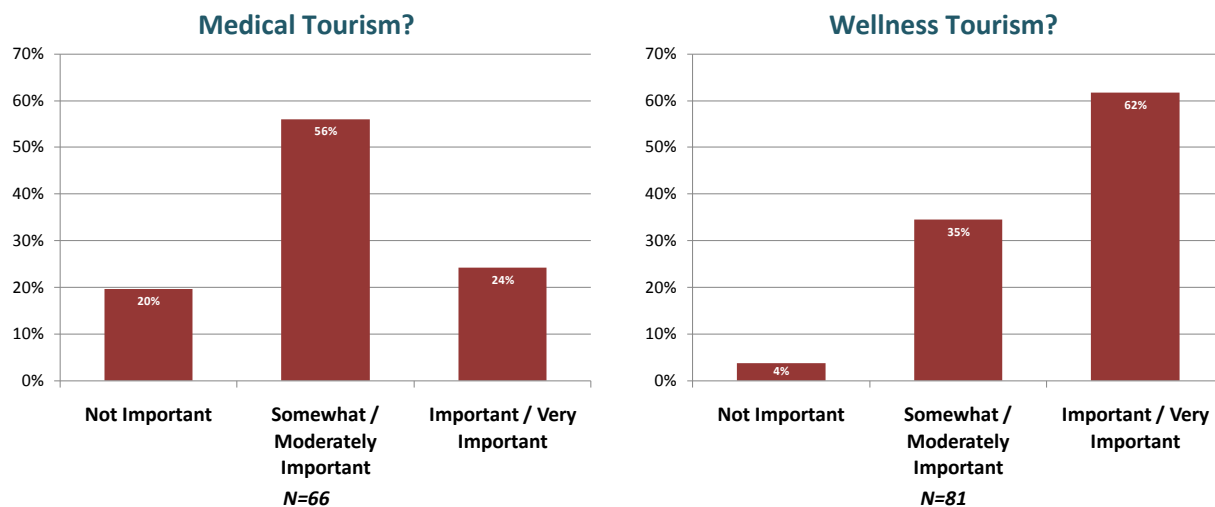
Industry members feel that spas play a much more important role in wellness tourism than in medical tourism.

Survey respondents who said that their country *is* promoting medical tourism or wellness tourism were then asked what role spas play in these markets. As shown in *Figure 7* below, the responses indicated that the industry feels that spas play a much more important role in the wellness tourism market than they do in the medical tourism market. About 62% of respondents said that spas play an “Important” or “Very Important” role in wellness tourism (i.e., Spas are actively promoted as key players in the country’s wellness tourism sector), while only 24% said the same for medical tourism.

For the medical tourism market, the majority of respondents (56%) felt that spas play a “Somewhat” or “Moderately Important” role in their country (i.e., Some spas in the country serve medical tourists, but they are not actively promoted as part of medical tourism), while 20% answered that spas are “Not Important” in medical tourism (i.e., Spas are not a part of medical tourism in the country).

For these questions, there was very little variation in the distribution of answers across the responses in Asia, Europe, and North America.

Figure 7: In your country, what role do spas play in:



Industry members believe that wellness tourists who visit spas are looking for the core menu of spa services, while medical tourists who visit spas are looking for a mix of traditional and non-traditional spa services.

The survey asked respondents to list the top five spa services, treatments, or facilities they think medical tourists and wellness tourists visiting spas in their country are most likely to purchase (see Figures 8 and 9 on the following page).

- **For medical tourists:** “Massage” was the most frequently selected response, chosen by 41% of survey respondents. Another “core” spa service, “Body treatments,” was ranked fifth on the list of responses (26%). Interestingly, the other answers that ranked in the top five are not among the “core” or “traditional” spa services: “Health assessments & consultation” (33%), “Recovery from surgery” (31%), and “Medical testing” (31%).
- **For wellness tourists:** Survey respondents felt that wellness tourists are most interested in the “core” or “traditional” spa services – the top five answers were “Massage” (76%), “Body treatments” (50%), “Meditation/spiritual/mind-body programs” (45%), “Facial treatments” (38%), and “Exercise facilities & programs” (35%).

Top Spa Offerings the Industry Believes Medical Tourists and Wellness Tourists are Interested In	
Medical Tourists	Wellness Tourists
Massage	Massage
Health assessments & consultations	Body treatments
Recovery from surgery	Meditation/spiritual/mind-body programs
Medical testing	Facial treatments
Body treatments	Exercise facilities & programs
Preparation for surgery	Water-based treatments
Dermatology services	Nutrition programs
Facial treatments	Health assessments
Meditation/spiritual/mind-body programs	Manicures/pedicures
Exercise facilities/programs	Healthy foods

Figure 8: For the medical tourists who visit spas in your country, what specific spa services and products are they most likely to purchase?

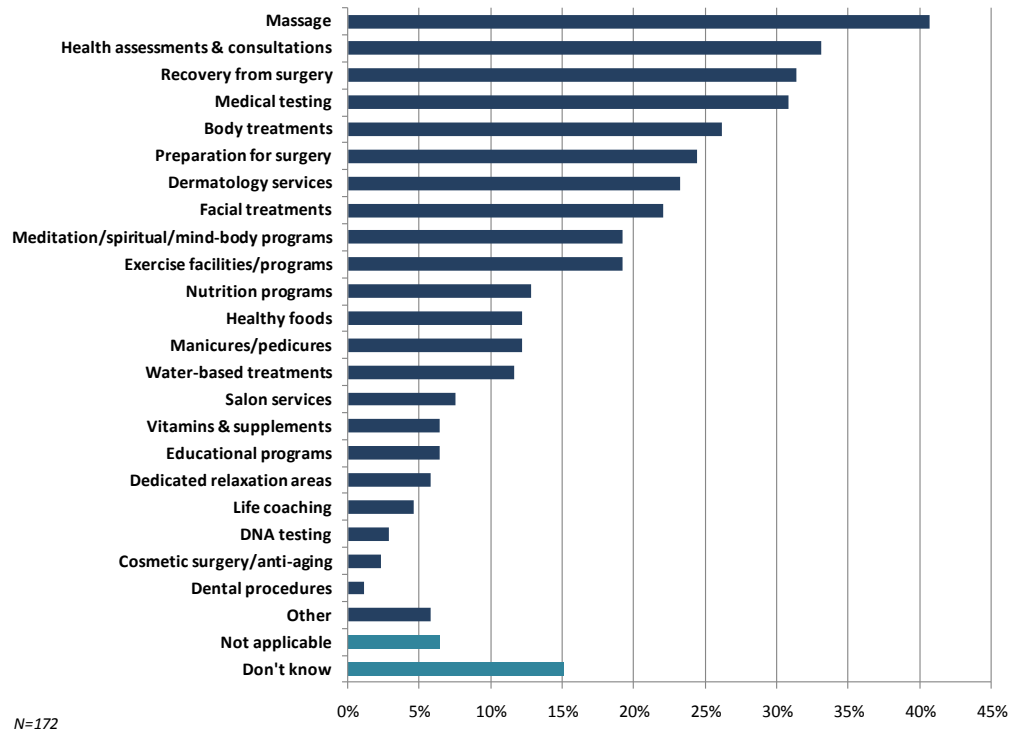
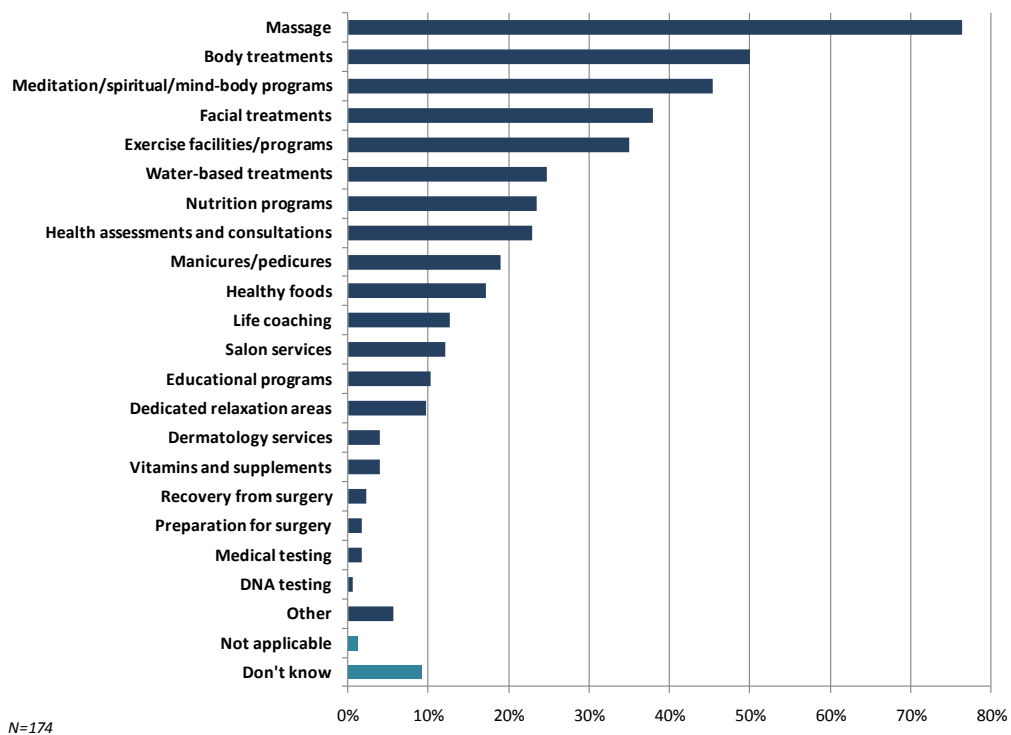


Figure 9: For the wellness tourists who visit spas in your country, what specific spa services and products are they most likely to purchase?

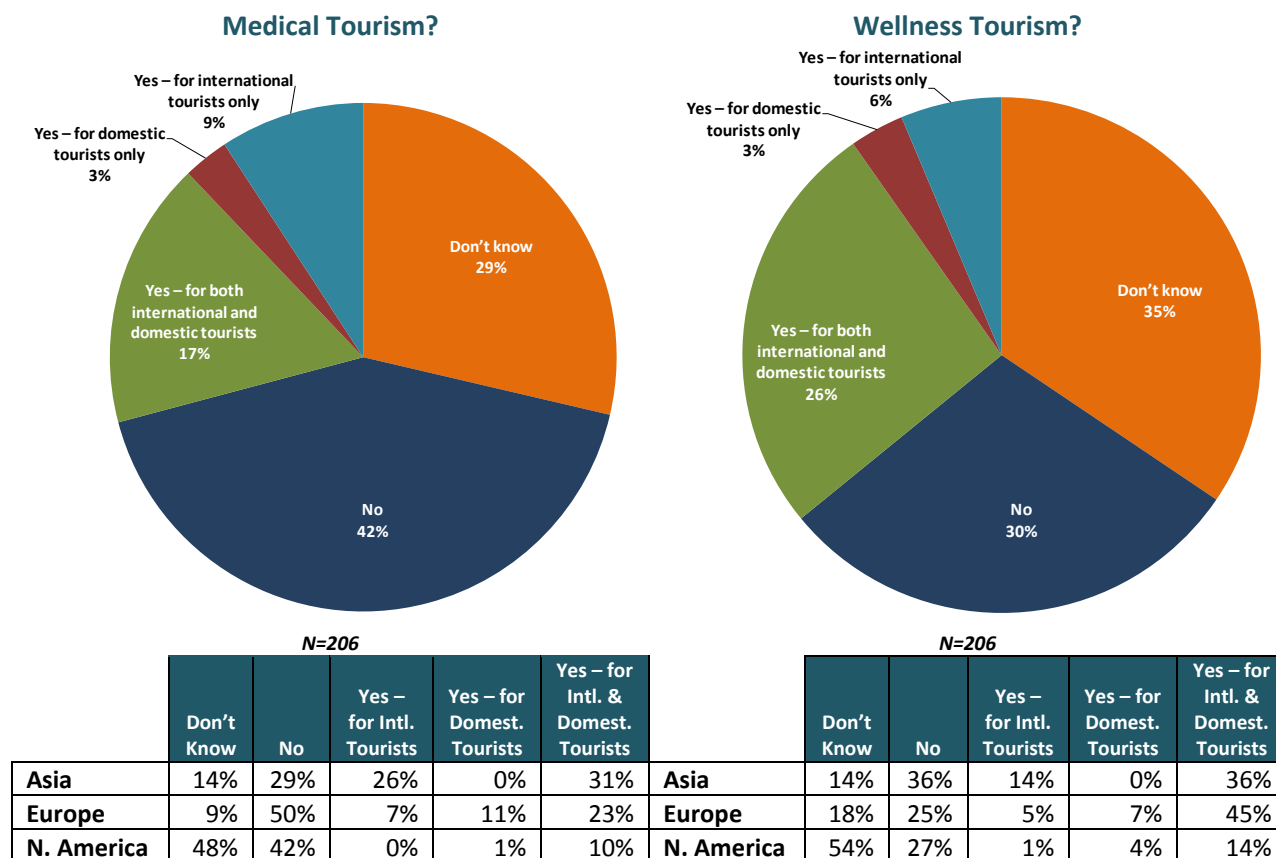


D. Spa Industry Awareness of Wellness Tourism & Medical Tourism Promotion

More industry members feel that their countries are actively promoting wellness tourism than medical tourism, although the level of awareness about government promotional efforts varies across different regions of the world.

About 29% of survey respondents stated that their country’s government or national tourism organization is actively promoting medical tourism, while 35% said their country is actively promoting wellness tourism. In general, however, the responses to these questions reveal that there is a significant lack of awareness among global spa industry members about medical and wellness tourism promotion in their own countries. About 29% of respondents indicated that they “don’t know” when asked about medical tourism promotion in their country, while even more (35%) answered “don’t know” about wellness tourism.

Figure 10: Is your country’s government or national tourism organization actively promoting:



The lack of awareness was especially high in North America, where approximately half of respondents answered “don’t know” to the questions about both medical tourism and wellness tourism promotion. This result is not surprising, since there is no national tourism organization in the United States (and tourism promotion tends to be done in a more fragmented way – at the state/regional levels, and by the private sector). In Asia and Europe, by contrast, a much smaller

share of respondents answered “don’t know” to both questions (about 14% in Asia and 9%-18% in Europe).

- In **North America**, other than the large number of respondents who answered “don’t know,” a very large share of respondents felt that their country *is not* promoting medical tourism (42%) or wellness tourism (27%), while very few respondents felt that their country *is* promoting medical tourism (11%) or wellness tourism (19%).
- In **Europe**, 57% of respondents felt their country *is* promoting wellness tourism, while only 41% felt their country *is* promoting medical tourism. Among these, most felt that the promotion is focusing on both the international and domestic tourism markets. About 25% of Europeans said their country *is not* promoting wellness tourism, while 50% said that their country *is not* promoting medical tourism.
- In **Asia**, 50% of respondents felt their country *is* promoting wellness tourism, while an even greater share (57%) felt their country *is* promoting medical tourism. There was a fairly wide split among the share of respondents who felt that the promotional efforts are focusing on *both* international and domestic tourism markets, versus only on international tourists. About 36% of Asians said their country *is not* promoting wellness tourism, while 29% said their country *is not* promoting medical tourism.

The two survey questions discussed above were primarily designed to assess spa industry members’ awareness of government promotional efforts for medical and wellness tourism – rather than whether such promotion is or is not actually taking place in their countries. Interestingly, however, the responses do seem to mesh with what kinds of promotional efforts are actually taking place in various regions around the world (based on the other research conducted for this study).

- **Asian** countries do tend to promote medical tourism much more heavily than wellness tourism, and tend to focus more on international tourists than domestic (and this is reflected in the response pattern from Asian respondents).
- Across **European** countries, there does tend to be an emphasis on wellness tourism that is equal to or greater than medical tourism, and domestic tourists play a stronger role in these markets (as compared to in Asia) – this is also reflected in the response pattern from European respondents.
- In **North America**, the fact that half of respondents answered “don’t know” to these questions is not surprising since tourism promotion efforts tend to be more private sector-led than government-led, and are more often done at a state or regional level than a national level. The more fragmented and dispersed nature of promotional efforts could help explain the overall lack of awareness among North American respondents about what kinds of promotion are actually taking place.

E. Spa Industry Views on Wellness Tourism & Medical Tourism as Opportunities

Looking to the future, the spa industry sees wellness tourism as a greater business opportunity than medical tourism.

Survey respondents were asked whether their business or organization plans to make any new investments over the next 5-10 years to take advantage of opportunities related to medical and wellness tourism. As shown in *Figure 11*, respondents see far greater opportunities for the spa industry related to wellness tourism than to medical tourism. About 85% stated that they plan to make investments to pursue wellness tourism opportunities, while only 54% plan to make investments related to medical tourism opportunities. This distribution of responses remains the same when looking at the answers on a regional basis (across Asia, Europe, and North America).

When asked what they will do to take advantage of these opportunities, the top approaches selected by respondents were similar across both medical and wellness tourism (although in a slightly different order – see *Figures 12 and 13* on the following page): “Introduce new services/products,” “Develop new partnerships,” “Use different marketing/advertising terminology, techniques, or channels,” “Target new customer segments,” “Repackage existing services/products or promote them differently.”

Figure 11: Looking 5-10 years into the future, does your business/organization plan to invest in any new services/products/partnerships/ventures to take advantage of opportunities in:

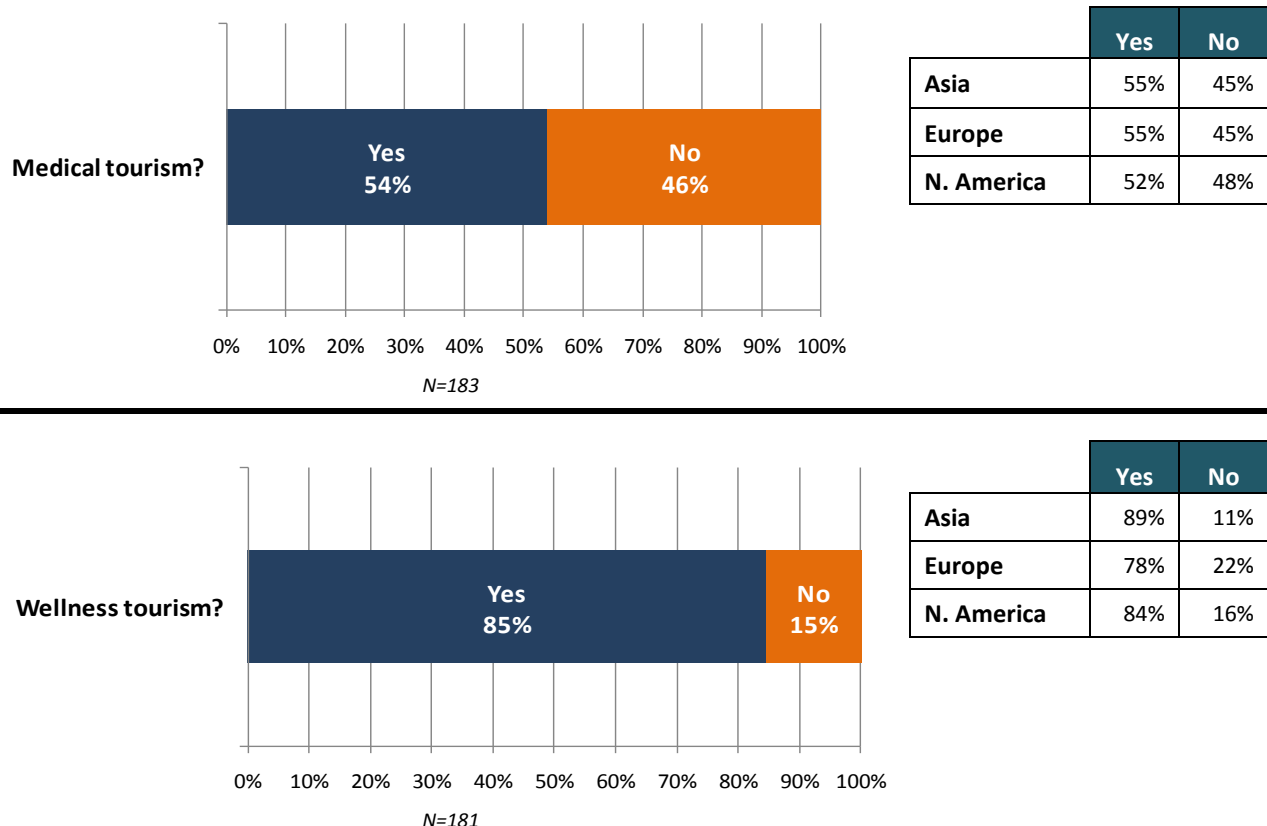


Figure 12: What are you most likely to invest in to take advantage of medical tourism opportunities?

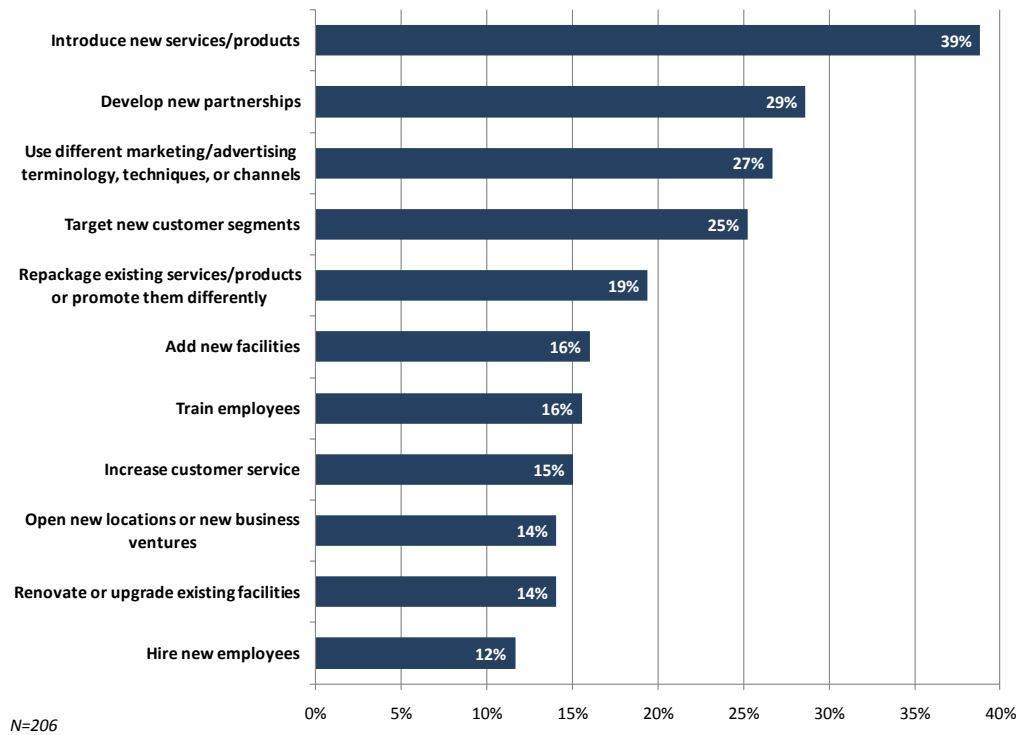
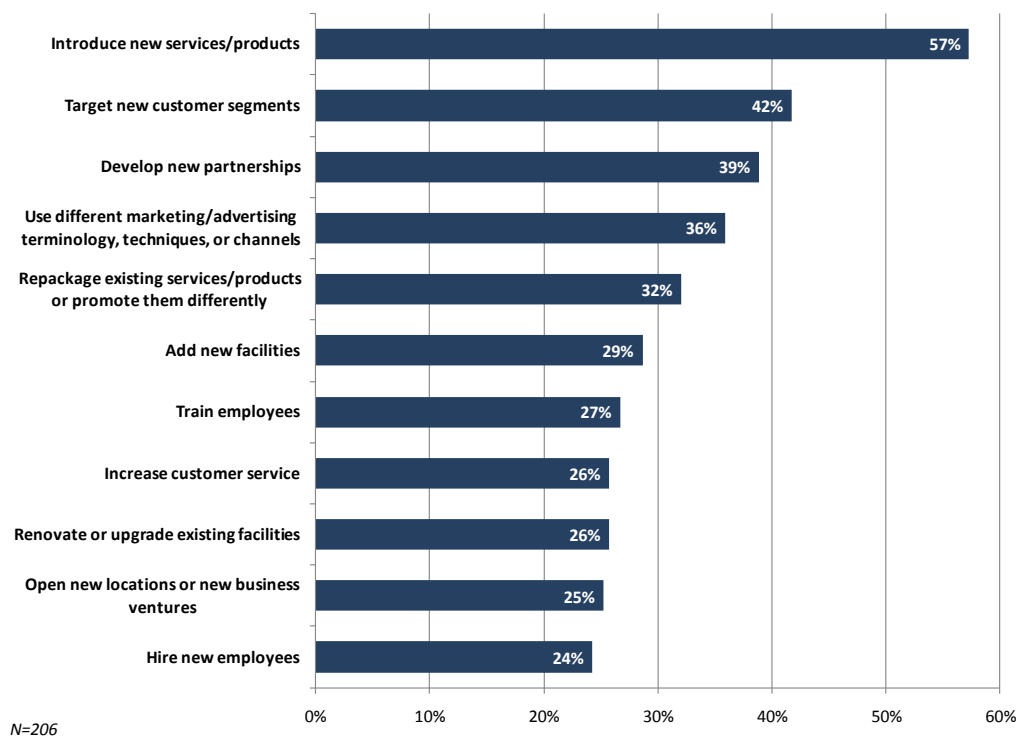


Figure 13: What are you most likely to invest in to take advantage of wellness tourism opportunities?



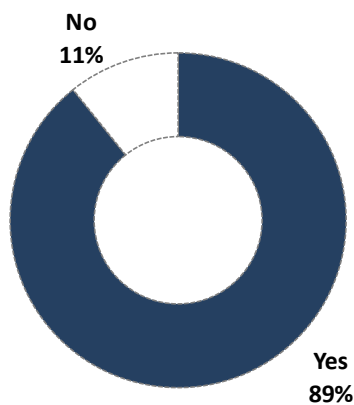
F. How Can the Spa Industry Work to Enhance Wellness Tourism & Medical Tourism Opportunities?

Spa industry members feel that the terminology/definitional issues with medical tourism and wellness tourism are a challenge that should be addressed at the industry level.

The survey asked a series of three questions about the challenges related to the terms “medical tourism,” “wellness tourism,” and “health tourism.” About 9 out of 10 survey respondents felt that these terms are used and defined inconsistently around the world, and 95% felt that this caused confusion for consumers. About 95% also felt that the spa industry should work together to develop understandable and more consistent definitions for these terms. These responses were nearly identical when looking at the answers on a regional basis (across Asia, Europe, and North America).

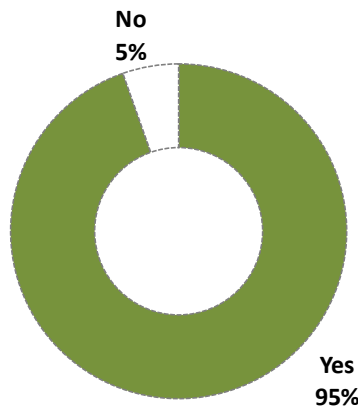
Figure 14: Three questions related to terminology and definitions:

Do you think the terms medical tourism, wellness tourism, and health tourism are used and defined differently/inconsistently by various people and countries around the world?



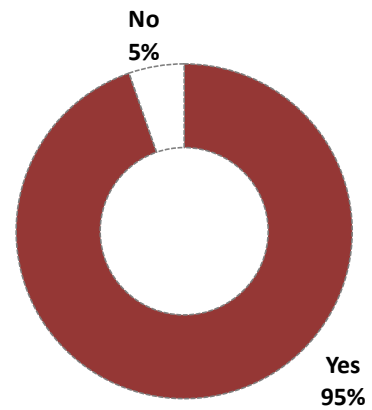
N=186

If Yes, do you think this causes confusion for consumers?



N=167

Do you think the spa industry should work to develop and encourage understandable and consistent definitions for the terms medical tourism, wellness tourism, and health tourism?



N=188

	Yes	No		Yes	No		Yes	No
Asia	87%	13%	Asia	100%	0%	Asia	97%	3%
Europe	93%	7%	Europe	92%	8%	Europe	93%	7%
N. America	90%	10%	N. America	92%	8%	N. America	93%	7%

Spa industry members see wellness tourism as much more important to the future of the spa industry than medical tourism.

The vast majority of survey respondents felt that both medical tourism and wellness tourism are important to the future of the spa industry. The level of importance they place on these markets, however, varies. About 88% of respondents stated that wellness tourism is “Important” or “Very Important,” while only 52% placed this level of importance on medical tourism (see *Figure 15*).

A follow-up question then asked whether survey respondents felt that spas should try to increase their role and visibility in the medical and wellness tourism markets, and the answers to this question paralleled the answers to the question above. Respondents stated almost unanimously that spas should increase their role in wellness tourism (97%), while about two-thirds stated that spas should increase their role in medical tourism (see *Figure 16*).

The distribution of responses for both of these questions was very similar when looking at the answers on a regional basis (across Asia, Europe, and North America).

Figure 15: How important are the following for the future of the spa industry?

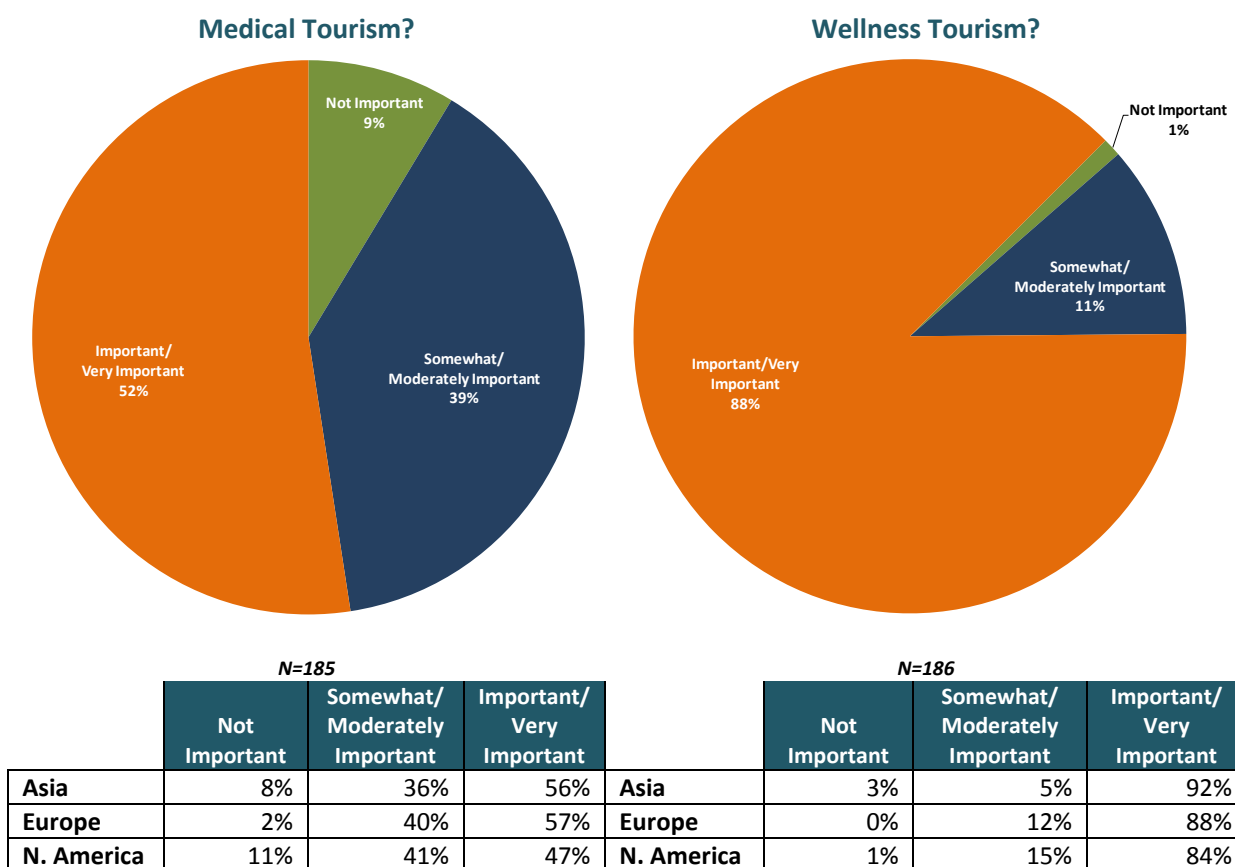
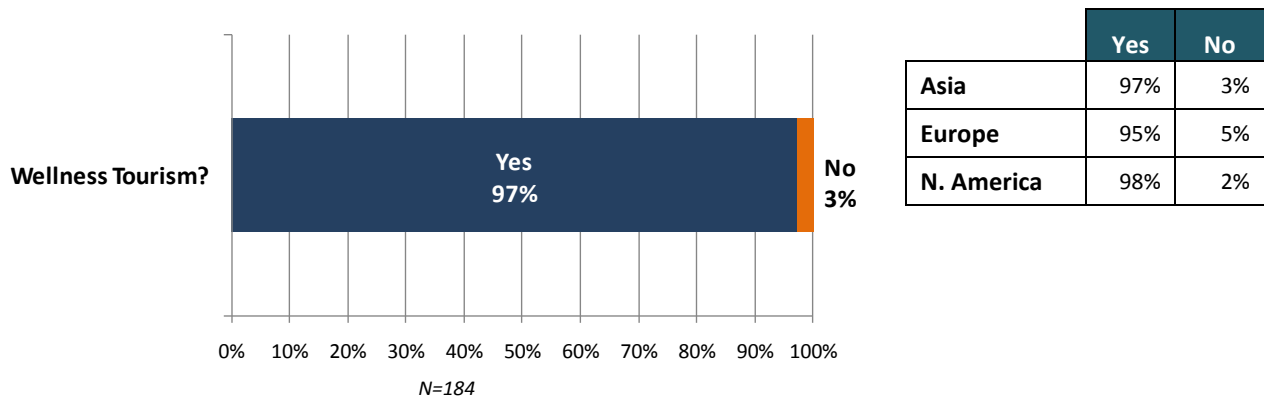
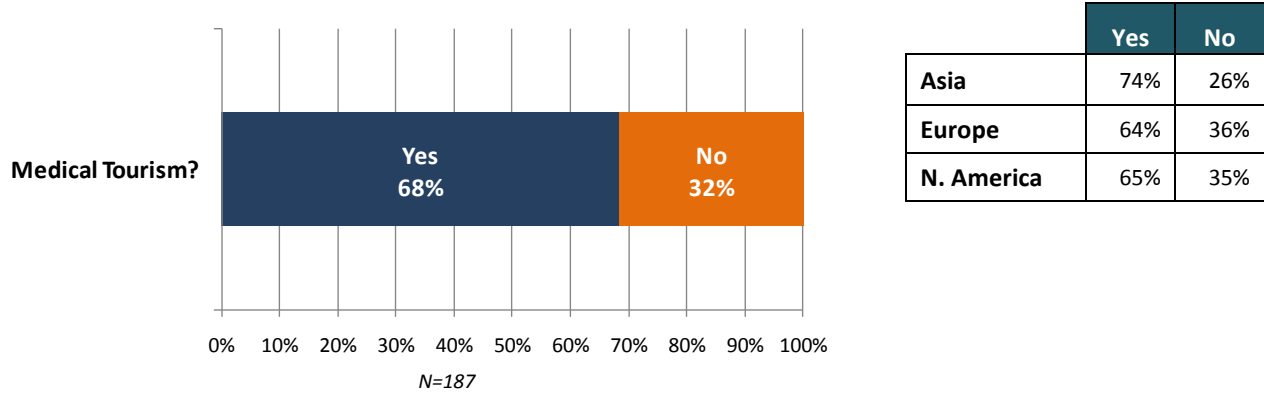


Figure 16: Do you think spas should try to increase their role and visibility in:

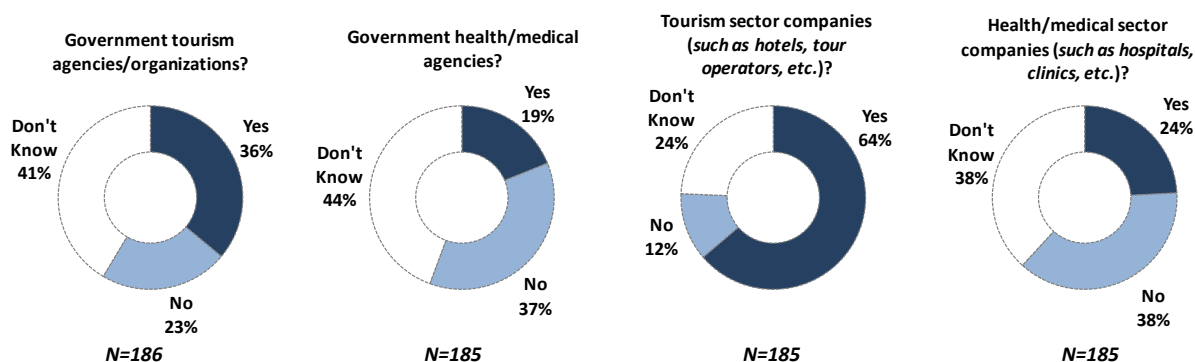


The industry feels that improving partnerships and collaboration is the most important step for increasing spas' roles and visibility in medical and wellness tourism.

As shown in *Figure 17*, survey respondents indicated that there is not currently a strong level of collaboration and communication between spas and other key players in the medical and wellness tourism sectors, except for with other tourism-related companies. About 64% of respondents stated that the industry collaborates with tourism companies such as hotels and tour operators. Partnerships with the public sector are less strong, with 36% believing that spas are collaborating with government tourism agencies/organizations.

Looking at partners that would be relevant in the medical tourism sector, the spa industry is not currently pursuing collaboration with key partners: only 24% believe spas are collaborating with health/medical companies (such as hospitals and clinics), and only 19% believe spas are collaborating with government health/medical agencies.

Figure 17: Does the spa industry in your selected country actively collaborate and/or communicate with:



When asked what should be done to increase the role and visibility of spas in medical tourism and wellness tourism, respondents' answers were remarkably consistent across both sectors. The number one answer selected by survey respondents was to "Develop more partnerships and alliances with others in the medical/wellness tourism sectors" (see *Figures 18 and 19*, below) – which is not surprising given that the current level of partnering and collaboration is not strong (based on the question above).

Second in importance for both sectors was the definitional/terminology issue: "Develop a more consistent/clearer definition of what medical/wellness tourism is." The third-ranking answer was the only one that varied across the two sectors: for medical tourism, respondents selected "Improve employee skills for serving medical tourists," while for wellness tourism, respondents selected "Improve or expand the services/products that spas offer for wellness tourists."

Figure 18: What do you think should be done to increase the role and visibility of spas in the medical tourism sector?

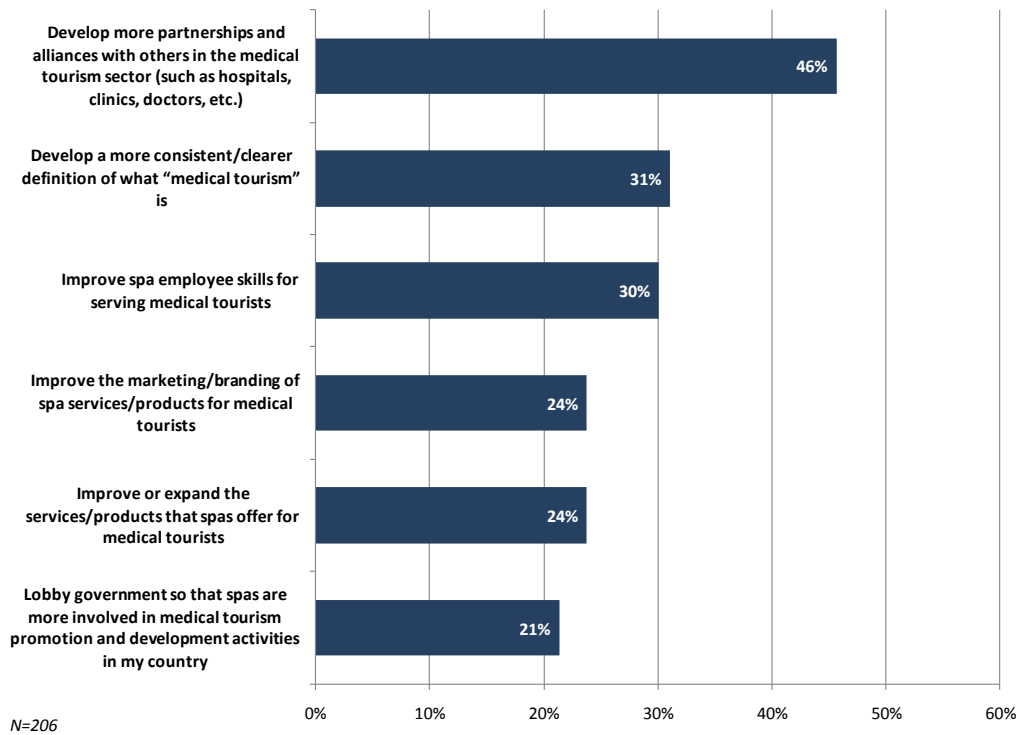
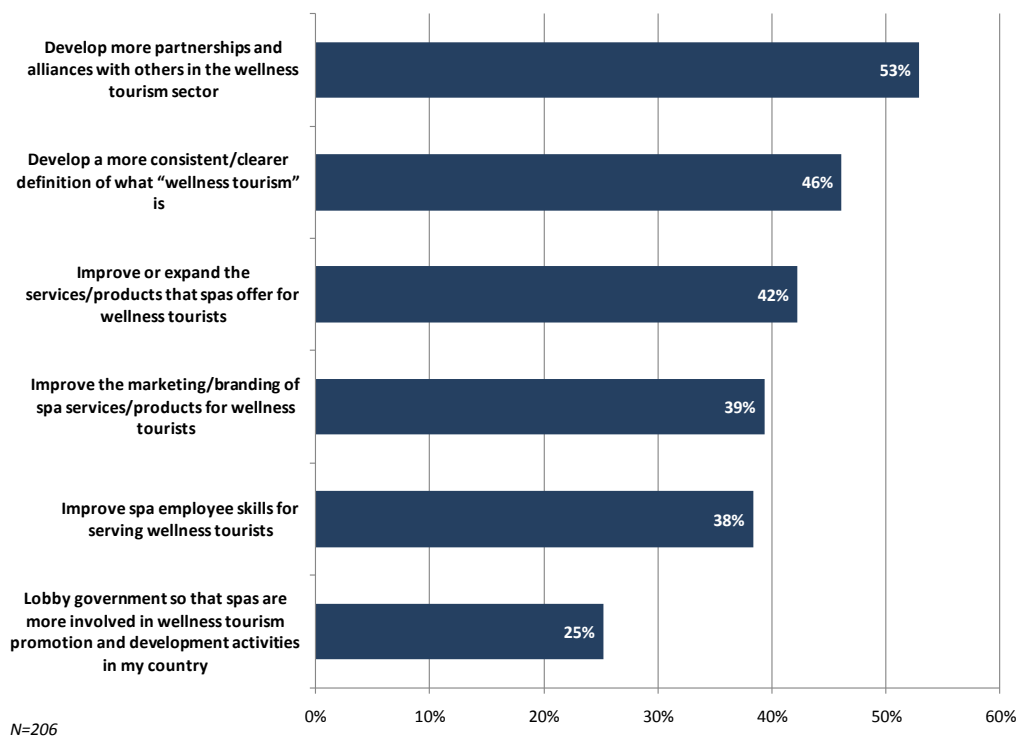


Figure 19: What do you think should be done to increase the role and visibility of spas in the wellness tourism sector?



Part IV:

Wellness Tourism and Medical Tourism: Where Do Spas Fit?

Recommendations

Part IV: Wellness Tourism and Medical Tourism: Where Do Spas Fit? *Recommendations*

Part IV outlines a number of initiatives that could be pursued by the Global Spa Summit, regional/country-based industry associations, and individual businesses to raise the visibility and role of spas in the medical tourism and wellness tourism sectors, and also to support the industry’s aims at pursuing the growing opportunities in these markets.

Definitions and Terminology

- 1) Reduce confusion among consumers, industry, and governments by establishing clear and consistent definitions for *medical tourism* and *wellness tourism*, emphasizing the distinctions between the two terms. Suggested definitions are provided below. Consider using the term *health* as an umbrella for both sectors, but avoid using the term *health tourism* in marketing to prevent further ambiguity.

Medical Tourism	Wellness Tourism
<p>Medical tourism involves people who travel to a different place to receive treatment for a disease, an ailment, or a condition, or to undergo a cosmetic procedure, and who are seeking lower cost of care, higher quality of care, better access to care or different care than what they could receive at home.</p> <p>Medical tourist: Generally ill or seeking cosmetic/dental surgical procedures or enhancements.</p>	<p>Wellness tourism involves people who travel to a different place to proactively pursue activities that maintain or enhance their personal health and wellbeing, and who are seeking unique, authentic or location-based experiences/therapies not available at home.</p> <p>Wellness tourist: Generally seeking integrated wellness and prevention approaches to improve their health/quality of life.</p>

- 2) Establish basic, flexible definitions and typologies of spas that can be used and applied worldwide, and especially typologies that can capture the evolving nature of the medical tourism and wellness tourism markets.

Partnerships and Collaboration

- 3) Encourage a cooperative spirit between medical tourism and wellness tourism, instead of a competitive one. Carefully build collaborative relationships with key players in both sectors, including government entities, industry associations, and other businesses (e.g., medical providers such as hospitals/clinics, medical tourism facilitators, travel agents, accommodations providers, etc.).

- 4) Support the development and expansion of national, regional, and international spa associations that can serve as platforms for communication, networking, lobbying, information sharing, training, and standards-setting. If an association already exists in your country, become an active participant or supporter. If an association does not exist, start one. Consider collaborations or mergers across related associations so that the industry is less fragmented (e.g., massage therapist association, day spa association, etc. should work together).

Differentiation and Branding

- 5) Develop a strong and unique brand for your medical tourism and wellness tourism offerings by emphasizing *authentic, location-based, and signature* services, treatments, and experiences that draw directly from unique local traditions (e.g., sauna, hammam, onsen) and natural assets (e.g., jungle, seashore, mountains, outback).
- 6) Improve differentiation and create a unique selling point for your standard service/product offerings for both medical tourism and wellness tourism by identifying what you are really good at. Don't just promote a long menu of generic services and products (e.g., 50 kinds of medical treatments available at a clinic, 15 kinds of massage at a spa). Focus on the areas in which you have a well-developed and recognized specialization or strength.

Product Development and Marketing

- 7) Capture the "borderline" wellness tourists – those who may pursue one or two spa/wellness-related offerings as part of a leisure or business trip – by partnering with other tourism providers to package spa/wellness offerings with other kinds of tourism experiences (e.g., culture, nature, sports, adventure, business, conferences).
- 8) Recognize that there are opportunities for the spa industry in medical tourism, and pursue these opportunities carefully and collaboratively. Build packages of pre-op, post-op, rehabilitation, and therapeutic services for different profiles of medical tourists. Offer elective and less-invasive procedures for medical tourists within dedicated spa facilities (e.g., medi-spas, dental spas). Create relaxation and stress relief packages for caregivers and family members who accompany medical tourists.
- 9) Think about how to position your business and market your offerings to domestic tourists, intra-regional tourists, and international tourists. All three markets may offer strong opportunities for medical tourism and wellness tourism development, but they may also have very different needs and interests, and may be attracted by different things.

Emerging Opportunities

- 10)** Be flexible and open to emerging trends and product developments. Consider changing your menu of offerings, your approach, or even the name of your spa or medical establishment to position yourself for the broader medical tourism and wellness tourism markets, especially if entering new fields or pursuing new markets (e.g., longevity, anti-aging, cosmeceuticals).
- 11)** Consider providing more eco-friendly, organic, natural, and locally-sourced products, services, treatments, and facilities to give travelers a sense of place, and also to cater to the growing consumer demand for these offerings (which is in many ways linked with the growing interest in wellness).
- 12)** Embrace the growing interest in holistic and lifestyle-oriented approaches to wellness. Build integrated packages that cater to tourists who want to “change their lives” on holiday, including offerings such as: body-mind-spirit offerings, healthy eating, detoxification, anti-aging skin care (from the inside out), stress management, work-life balance, life coaching, and so on.

Data and Information

- 13)** Improve and expand data collection efforts for the spa industry, as well as for the medical tourism and wellness tourism sectors. Improve metrics, benchmarks, and statistics.
- 14)** Continue to support development of a scientific evidence base for spa and wellness modalities; build a database to organize this information; and make it accessible to industry, consumers, and governments. Use this information for promotional purposes, and also to build acceptance of spa and wellness modalities within the conventional medical community.

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Saskia Lima, Head of Department, Ministry of Tourism, Brazil

Julie Lindahl, Owner, Nordic Wellbeing AB, Nordic Wellbeing, Sweden

Nancy London, Vice President and Global Brand Leader, Westin Hotels and Resorts Worldwide, United States

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Joppe Marion, Professor, University of Guelph, Canada

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257 Park Avenue South 10th Floor
New York, New York 10010

www.globalspasummit.org

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Ruben Toral, Founder, Medeguide, Thailand

Elizabeth Varte, Director, Visit India, India

Frank Verschuren, Head of Department, Canadian Tourism Commission, Canada

Cornelia Voight, Independent Research Professional, Austria

Mike Wallace, Manager, Danubius Hotels Health Spa Brand Manager, Hungary

Todd Walter, CEO, Red Door Spa Holdings, United States

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Judit Zoltan, Researcher, University of Lugano, Switzerland