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**ИНТЕГРИРАНЕ НА ЗДРАВНО ОРИЕНТИРАНИТЕ ИНДУСТРИИ (БАЛНЕОЛОГИЯ,  
СПА И УЕЛНЕС) В ОБХВАТА НА БЪЛГАРСКИЯ ТУРИЗЪМ**

**INTEGRATION OF HEALTH –ORIENTED INDUSTRIES (BALNEOLOGY, SPA AND  
WELLNESS) IN THE SCOPE OF BULGARIAN TOURISM**

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**Abstract:** Health-oriented tourism is assessed as a segment of increasing importance within the scope of the global tourism industry for the last decades. Fast developing processes of segmentation and fragmentation resulted in establishment of separate categories and subcategories of health tourism such as SPA, Wellness and Balneo-oriented tourism. Their wide popularization across the world and customer satisfaction is a precondition for their differentiation into independent industries going beyond the scope of tourism. And logically here comes the most important question – what is the key concept for each of these three industries? How are they treated within the different countries and regions in the world?

Why is not there a common concept and definition for SPA and Wellness tourism around the globe? What is the reason for the abundance of interpretations, describing their scope, scale, used means and final products?

This paper analyzes the most important problems related to the definitions of SPA, Wellness and Balneo-oriented industries and their specific features in tourism.

Some recommendations and a model for their development in Bulgarian are proposed.

**Keywords:** SPA, Wellness, Balneo tourism, Health-oriented tourism

Health-oriented tourism is assessed as a segment of increasing importance within the scope of the global tourism industry for the last decades. Fast developing processes of segmentation and fragmentation have resulted in establishment of separate categories and subcategories of health tourism such as SPA, Wellness and Balneo-oriented tourism. Their wide popularization across the world and customer satisfaction is a precondition for their differentiation as independent industries going beyond the scope of tourism. In other words balneo-, Spa and wellness could be treated on the one hand

as health industries and on the other as tourism market segments. In order to determine the scope of extent, their conceptualization is needed. Each of these three industries and market segments is built upon certain concepts.

**Balneotourism is developed as balneological and therapeutic practices, implemented away from the permanent place of living of individuals.** Balneology is considered as **"a branch of medicine that deals with treatment of diseases through mineral water and therapies based on its utilization on individuals"** (2009).

Some authors consider the idea that SPA definition originates from the Latin acronym (**Sanus Per Aqua** that is Health through water). According to other sources, SPA is the name of a town in Belgium, which became popular during Roman times for its baths. The definition, given by the International SPA Association (2004) claims that SPA is an **“entity devoted to enhance overall wellbeing through a variety of professional services that encourage the renewal of mind, body and spirit”**. According to Mueller and Kaufmann (2006, cited by the Canadian Tourism Commission) the SPA experience contributes to a “wellness” feeling. Both authors think that it constitutes a **“state of health featuring the harmony of body, mind and spirit, with self responsibility, physical fitness/beauty care, healthy nutrition/diet, relaxation/meditation, mental activity/education, and environmental sensitivity/social contacts as fundamental elements”** of this type of experience. Definitions about SPA content are given by professional SPA associations around the world.

According to Smith (2008) **Spa tourism is type of tourism, “focused on the effect of relaxation and curative influence on the human body, achieved by the means of water-based procedures, such as mineral waters, thermal pools, vapor-baths and saunas. The emphasis is placed upon the healing properties, leading to recovery and renewal of the body.”**

The Wellness concept is also a subject of lots of interpretations and various understandings.

According to Mayers, Sweeny and Witmer (2005, cited by Smith and Kelly) **wellness is a „way of life oriented toward optimal health and well-being in which the body, mind and spirit are integrated by the individual to live more fully within the human and natural community”**. Smith and Kelly (Smith and Kelly, 2006) adopt the following concept of wellness – **„a healthy balance of the mind-body and spirit that results in an overall feeling of wellbeing”**

The definition, given by Mueller and Kaufmann (2000, cited by Universidad de Las Palmas de Gran Canaria) defines **wellness tourism as „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 know-how and individual care. Furthermore, they require a comprehensive service package including physical fitness (physical exercises) healthy care, healthy nutrition/diet, relaxation/meditation and mental activity/education.”**

From conceptual viewpoint the main differences between these three forms of tourism could be specified on the basis of the **indicators duration of stay, motivation, spheres of influence and compulsory elements** (Table 1).

**Table 1 Comparison indicators of balneo-, spa and wellness tourism**

	<b>Duration of stay</b>	<b>Motivation</b>	<b>Spheres of influence</b>	<b>Compulsory elements</b>
<b>Balneotourism</b>	Medium-term to long stays	Healing or prevention of health problems or existing disease	Physical state	Medical staff and supervision
<b>SPA tourism</b>	Short and medium-term stays	Body and mind renewal and re-energizing	Physical with / without emotional	Water-based and other procedures

			state	and/or treatments
<b>Wellness tourism</b>	Medium-term to long stays	Optimization of health and overall well-being	Complex influence on the physical, emotional and spiritual state	Customized wellness programmes prepared for any wellness tourist

This distinguishing comparison reveals that each of these three tourism forms has a specific target group which differentiate it from the other two. With a view to that, we may summarize that:

Balneotourism is appropriate for unhealthy people experiencing health problems and diseases or ones, who need prevention of prospective illnesses;

Spa tourism is aimed at people looking for re-energizing, body and mind-refreshing treatments and stress-reduction.

Wellness target group of consumers includes people, seeking long-term health optimization, improvement of their quality of living, aiming to balanced and harmonious self –knowledge of their physical and emotional life.

From tourism viewpoint subject of observation are various specialized establishments providing balneo, spa and wellness tourism services. Furthermore, the emphasis should be laid only on these types of businesses which are directly involved with tourism sector, as there are a lot of other category and classification systems and schemes, intended for balneo, spa and wellness health independent industries.

Based on the ISPA's classification of Spa /wellness establishments including Club Spa; Cosmetic Spa; Cruise Ship Spa; Daily Spa; Destination Spa; Medical Spa; Mineral Springs Spa; Resort/ Hotel Spa, subject of interest for tourism sector represent SPA and wellness hotels and destinations, as they are intended to be entirely tourism-oriented.

The data, published in the report of the Global SPA Economy 2007 reveals that SPA hotels and Spa destinations share a relevantly low percentage out of the overall

SPA and wellness-oriented establishments in global scale.

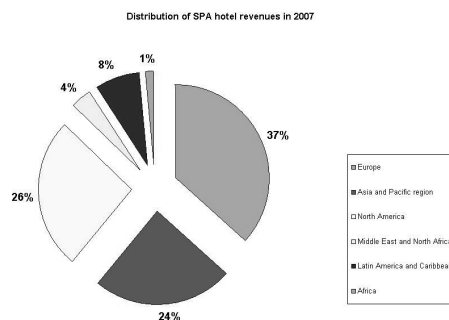
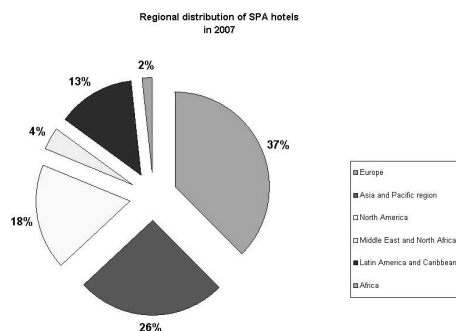
SPA hotels account for 16% of the total number of SPA establishments, whereas SPA destinations represent only 2 %. Their regional distribution reveals that the largest number of establishments is located in Europe, in particular 37 % of all Spa hotels and 81 % of Spa destinations from their overall number across the world.

In scope of their revenues, the data collected in 2007 shows that Spa hotels generate 26,9% of the overall amount generated in this sector. The same indicator for Spa destinations comes to 13,2 %. The correlation – number of specialized establishments and their income share reveals that Spa/wellness hotels and Spa/wellness destinations are of greatest importance as revenue generators in the industry.

A closer look at SPA hotel and their revenue distribution in global scale could give a better idea of their significance for tourism sector. (Figures 1 and 2).

Despite the fast development pace of this tourism sector, the latter is confronted to a series of problems and difficulties. One of the main issues, concerning development of spa hotels represents their occupancy rate. In July 2009, statistical data (source Global Spa Summit 2009 press release) reveals that approximately 38 % of all hotel visitors are not guests of the hotels whose spa and wellness centers they visit. On the contrary the majority of the consumers are local residents. In some parts of the European continent and the Middle East there is almost an equal distribution between these groups, accounting for 53 % hotel guest and 47 % other guests.

**Figure 1 Regional distribution of SPA of Spa hotels in 2007 hotel revenues in 2007**



*Source Global SPA economy 2007*

Except for the occupancy rates there are other pending questions concerning industry development which could be revealed only through a comparison of some of the leading markets offering balneo-, spa and wellness products. (Table 2 ).

#### **CONCLUSIONS:**

1. Basic spa/wellness problems in scope of tourism concern their attractiveness and promotion. In order for markets to be competitive they need to adopt development strategies, setting their key purposes and measurable results to achieve. On the other hand development of a spa/wellness strategy requires setting of distinctive spa/wellness concepts and their implication within the framework of tourism industry.

2. Another problem, concerning development of spa/wellness tourism markets is related to data collection of spa/wellness indicator values. The latter is very limited and most countries lack set of specialized statistical indicators, measuring spa/wellness market activity.

3. In order to be profitable spa/wellness products have to be integral parts of tourist products, supplementing other specialized services. On the contrary, if the latter are offered as independent tourist products to prospective tourists, they should feature distinctive competitive

characteristics, otherwise they could not motivate people to undertake spa/wellness travel, taking into consideration the large variety of spa and wellness establishments (including daily spa/wellness centres, mobile spa/wellness facilities and studios and etc), at the place of residence of people.

4. In terms of balneo, spa and wellness tourism demand we have to take into consideration the global trend of aging population, mainly in Europe, Americas and some Asian countries such as Japan. According to the US Census Bureau by 2050 the group of people over 65 will represent nearly 30 % of the population in Europe and 15 to 20 % on the other continents (except for Africa). Another projecting reveals that "by 2025 the proportion of the EU population between 50 and 64 will have increased by 25 %. Simultaneously, because of low birth rates, the 20 – 29 age group will have decreased by 20 %. (Akerib M., 2008)

Both trends indicate the forthcoming decades will lead to a transformation in the demographic structure of population and as a consequence they will cause changes in the economies of the leading countries in the world. On the other hand, such a tendency will change the lifestyle of millions of people all over the world. The aging society will need to pay more attention to

health issues more than ever before and disease control and prevention will be of great significance. With a view to that balneo, spa and wellness procedures and treatments will get the chance to strengthen and consolidate their role in the way of living of people. The latter in turn could trigger a new meaning and scope of extent of spa procedures and treatments. The role of waters, used to achieve human wellbeing could imply a new emphasis, the one of their healing properties and efficiency.

In the realm of these trends, countries rich in natural resources, mainly healing waters could benefit most especially if they develop and promote themselves as balneo, spa and wellness destinations. Bulgaria is one of the countries possessing potential for development in this market segment. For its over 800 spring and mineral water sources it could become a leading balneo, spa and wellness destination on the Balkans and Europe.

In order to achieve that the country has to solve a series of problems concerning this market niche. Currently the country

lacks officially adopted concepts for SPA and wellness applied to these health industries as well as to their tourism implication (Spa and wellness tourism). A variety of interpretations concerning the typology of the spa and wellness establishments is used. Despite the fact that Spa and wellness hotels are defined in the Regulation for categorization of tourist sites, the industry lacks specific requirements related to establishment of spa and wellness centers (built as individual sites or representing integral part of tourist complexes and resorts), requirements related to the product and service portfolio as well as the used means, techniques and treatments. The latter results form the lack of spa and wellness definitions. Definitions, that have to be implied within the Law on Tourism and serve as a basis for determination of the types and categories of the specialized establishments, their accreditation and license regime. With a view to the above, the following conceptual model could be applied in Bulgaria (Table 3 ).

**Table 2 Characteristics of leading SPA markets and estimations**

Country	Spa/ wellness Definition	Tourism oriented Spa / wellness	Stage of market development	Problems	Advantages	Features	Growth Potential
<b>Australia</b>	Lack of definition	Not set definition	Well developing, steady pace of growth	Lack of standards in terms of accreditation and rating (dec 2006)	Distinctive direction for further development – strategy for spa tourism	Products are similar to North American spa/wellness products	The country has potential to become a leading spa destination in global scale
<b>The UK</b>	A spa offers professionally supervised treatments, some of which are likely to be water based, aiming to enhance health, well-being and relaxation	There is not an individual definition, describing spa/wellness tourism-oriented establishments	Well-developed destination	Lack of coordination between tourism sector and spa establishment's lack of statistical data reporting for the total industry revenues, employment, visits or square footage	National Spa Accreditation Scheme containing set of standards intended for spa establishment's accreditation	Set of industry standards and certification for specialized establishments	Consolidation of this destination thanks to its quality based competitiveness

<b>Germany</b>	Spa is related mainly to Health and Cure sectors	A place where one can go for limited periods of time where the focus is on wellness	Distinctive classification in terms of establishment typology; long customs and traditions	Legislation tightening, leading to a decrease in treatments, covered by the national health system	Distinguishing from competitive destinations	Products are cure- and healing oriented	Great potential for development in wellness and activity-engaged holidays
<b>Canada</b>	Entities, offering health and wellness programmes, administered by professionally trained medical personnel; offer accommodation facilities; generate revenues from tourism visitation 10% and over	There is not an individual definition intended for spa/wellness tourism-oriented establishments	Almost saturated market	Not enough marketing promotion on spa facilities; lack of high-quality educational programmes; need for governmental support and involvement in the sector, there is a need of a national strategy.	High level of differentiation among spas in their competition; crossed-tourism products uniting spa and other tourism experiences in a single product.	Basic spa focuses: - wellness concept; - "back to the roots" concept; - non-invasive rejuvenation concept	In terms of tough competition spa development is dependant on product profile specialization

Source: *Spa, Health and Wellness sector Foreign Competitor Profiles*

Table 3 Conceptual model of Balneo, Spa and Wellness industries in Bulgaria

Concept	Main objective	Basic means	Typology
<b>SPA<sup>1</sup></b>	Table Conceptual model of Balneo, Spa and Wellness industries) Improvement of the physical, emotional and spiritual well-being of the individual and the human organism through water	Water – fresh, sea, mineral and spring water	<ul style="list-style-type: none"> <li>- Standard SPA – for all treatments and therapies is used fresh water</li> <li>- Mineral SPA- for all treatments and therapies is used mineral water</li> <li>- Spring SPA – for all treatments and therapies is used spring water</li> <li>- Sea SPA – for all treatments and therapies is used sea water</li> <li>- Combined – if more than one type of water is used the common name of the establishment is Combined SPA. Further indication on the category is given by its profile – for example a Combined Spring and Sea Spa.</li> <li>-</li> </ul>
<b>Wellness</b>	Achievement of an overall well-being through balanced influence on human physical,	Combination of minimum three services from the any of the both categories: <b>I Physical health:</b> - Customized regime of physical exercises improving the motive activity	<ul style="list-style-type: none"> <li>- Standard Wellness – when a combination of at least three services from the both categories (physical and emotional/spiritual health) are</li> </ul>

<sup>1</sup> All services, supplied in SPA centres, not water-based (such as massages, manual therapies, aromatherapies, aerotherapies and etc.) represent additional services, because they are not implied in the SPA concept.

	emotional and spiritual health.	<p>of the body;</p> <ul style="list-style-type: none"> <li>- Personal nutrition diet/ regime;</li> <li>- Massage and manual treatments and procedures for physical renewal of the body;</li> </ul> <p><b>II Emotional and spiritual health:</b></p> <ul style="list-style-type: none"> <li>-acquaintance with Eastern and/or Western philosophic teachings and practices</li> <li>- meditation, yoga, ayurveda and etc.</li> <li>- educational programmes in the filed of health;</li> <li>- psychological consulting;</li> <li>- special therapies aimed at spiritual renewal, such as aromatherapy, colour therapy, aerotherapy and etc.</li> </ul>	<p>provided.</p> <ul style="list-style-type: none"> <li>- Specialized Wellness – when the provided services fall under one of the both categories.</li> <li>- Category physical health – Body wellness;</li> <li>- Category spiritual and emotional health – Mental wellness;</li> </ul>
<b>SPA and Wellness</b>	Achieving balance between physical and emotional health through water-based or other procedures and therapies.	Combination of means applied to the individual concepts of SPA and Wellness.	<p>Standrad SPA and Wellness – supplies water-based therapies with fresh water and a combination of wellness procedures, improving both the physical and emotional/spiritual health of the individual.</p> <p>Specialized SPA and Wellness – the names of the specialized establishments derive from the combination of elements from each of both concepts.</p> <p>For example Sea Spa and Body wellness means that the establishment offers water-based therapies and procedures with sea water, aimed at improvement of the physical health of individuals (such as fitness exercises, specially developed nutrition diet, massages and etc.).</p>

Spa and wellness concepts could differentiate from balneological therapies and accordingly from balneotourism as the latter requires professional medical services and supervision.

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