Wellness Tourism Market and Destination Competitiveness: The Case of Greece

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Abstract: - Wellness tourism is one of the growing industries in the world and includes a large number of facilities that provide wellness and hospitality services to travelers. This article is part of the broader context of wellness tourism and in particular, it concerns the investigation of the supply and demand of wellness tourism services at the international level and in Greece. More specifically, the theoretical approach to wellness tourism is initially conducted within the framework of its utilization by travelers as a vacation choice. Subsequently, an analysis of the demand and supply characteristics of wellness tourism in the international tourist market is attempted. Finally, the trends in the supply and demand of the wellness tourism market focusing on the therapeutic springs in Greece are presented.

Key-Words: - Wellness tourism, hospitality services, hot springs, spa tourism, hotel, hospitality.

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1 Introduction

Researchers in [1] conducted a comprehensive literature review that combined the presentation of concepts with that of wellness, see the references [2], [3], [4], [5], [6].

More specifically, in [2] the author referred to the existence of a specific state of health condition, which consists of a broader and comprehensive concept of well-being. This well-being encompasses the individual's body, spirit, and mind, considering the person's dependence on the environment in which they operate. He characterized this particular health condition as "high-level of wellness". More explicitly, in [3], [4], [5] the concept of wellness is connected to the concept of health; specifically, in [4] there is an emphasis of the concept of wellness in conjunction with the concept of health: wellness is a state of being, an n attitude to life and an ongoing process (not a static condition) which, once achieved, does not require someone to reexamine and reassess it. Analyzing the interpretation of wellness in [3], the authors approach wellness as a state of health, where harmony has been achieved among the body, mind, and spirit, based on fundamental terms such as personal responsibility, care for physical health, aesthetic care, healthy nutrition, relaxation and de-stressing/ unwinding, meditation, spiritual activities, education, environmental awareness, and the development of social contacts.

This particular approach concludes that the core determinant of the concept of wellness is personal responsibility, followed by the functioning of the mind, body, the ability to relax and good health. On a subsequent level, wellness is shaped by social interactions and environmental sensitivity.

In [7], the author referred to four (4) basic principles that we should relied upon to approach the concept of wellness, as articulated in [8]:

- The term wellness has multiple dimensions (social, physical, emotional, mental/ intellectual, spiritual, environmental and occupational).
- Wellness involves the concept of balance.
- The pursuit and practice of wellness should be oriented towards identifying/ recognizing the

causes that lead to it, rather than focusing extensively on searching for causes that trigger specific diseases.

- Wellness is a subjective, everlasting/timeless and perceptual concept (involving more psychological factors than physical ones).

Therefore, they argue that wellness is a complex concept that incorporates wellness through lifestyle, physical, spiritual and mental wellness as well as the improvement of relationships with oneself and others in a broader environment. They define a six (6) dimensional model that focuses on wellness, emphasizing the physical, mental, spiritual, emotional, social and occupational aspects of life.
In [9], six (6) common fundamental principles of wellness that govern the wellness literature, are identified despite the significant differences in its definition:

- Wellness constitutes an alternative positive natural way of perceiving health.
- Wellness is a multidimensional, holistic structure.
- The concepts of balance and harmony play a central role in defining wellness.
- Wellness is seen as the realization of human potential.
- Wellness is a subjective, relative, and perceptual process.
- Individual action and responsibility for oneself play a fundamental role in achieving higher levels of wellness.

In conclusion, the analysis of the concept of wellness, one could argue that wellness tourism is the sum of all relationships and phenomena resulting from the travel and hospitality of people whose main motivation is to restore, maintain, and promote their physical and mental health, as well as their social wellness.

People reside in specialized accommodations (hotels) which provide them with appropriate professional expertise and personalized care. People demand and utilize a comprehensive service package, consisting of fitness and beauty/aesthetic care, healthy diet and/or nutrition, relaxation, meditation, mental and physical activities individually or in groups, and education. The place where they enjoy these services is different of their permanent residence or workplace, [10], as well as [6], [1]. Wellness tourism, along with medical and spa tourism are subset of health tourism, [11].

2 The Dilemma in the Theoretical Framework

Wellness is an individual pursuit, where we have self-responsibility for our own choices, behaviors, and lifestyle, while simultaneously being influenced by the physical, social, and cultural environments in which we live. Wellness is often conflated with terms such as health, prosperity, and happiness. Although they share common elements, wellness is distinguished by the fact that it does not refer to a static state of being (e.g., being happy, in good health, or in a state of well-being). Instead, wellness is linked to an active process of awareness and decision-making leading to an outcome of optimal holistic health and well-being.

The transformation of the global wellness tourism market, coupled with the enhancement of the relevant literature and articles, contribute to the fact that new theoretical questions arise which researchers are called upon to answer.

In [12], the authors raised the question of whether wellness tourism is ultimately about escaping from himself and everyday environment to destinations of total relaxation, or whether it is an occasion for the confrontation of the tourist with himself and the redefinition of everyone's position in the world and their interpersonal relationships.

Also, in [8] the authors raised the question of whether the scientific community and the market should start treating wellness tourism as a general concept that encompasses and integrates health tourism (medical and spa tourism). This is in contrast to the prevailing perception that health tourism constitutes the expanded concept that includes wellness tourism, spa tourism, and medical tourism.

Undoubtedly, the previous analysis of the relevant concepts certainly gives a broader meaning to wellness. Furthermore, tourism demand is shifting towards a direction that increasingly incorporates various dimensions of good health within the broader spectrum of wellness.

3 Demand and Supply Characteristics of Wellness Tourism Worldwide

Greece faces competition in the wellness tourism market primarily from central Europe. Destinations

with a long-standing tradition and brand name in the market possess competitive advantages, such as, easy accessibility (being centrally located in Europe) and the fact that the local population is familiar with the practices of this form of tourism, as their daily life unfolds in or near traditional spa towns. Additionally, major urban centres in Central Europe are located close to spa tourism centres, thus significantly facilitating tourist flows.

In the Mediterranean region, health and wellness tourism has also been developed in Cyprus, Israel, Turkey, Egypt, Morocco, and Tunisia. In recent years, Egypt has ventured into spa tourism by constructing a model health tourism centre ("Moses Springs"), drawing inspiration from detailed studies of similar successful examples in the European market, [13].

Standard health and wellness tourism centres also operate in Eastern European countries where spa tourism is highly developed and constitutes a significant part of their economy, such as the Czech Republic, Slovakia, Hungary, Romania, Serbia, Bulgaria, Russia, [14], [15]. In these countries, the development of spa tourism centres is attributed to the fact that, in addition to foreign visitors, a substantial number of the local population also visits these centres.

Characteristic example of the aforementioned is Russia, where one in fifteen Russians visits health resorts. Today, these spa towns attract young people and people of all ages, in part due to a shift towards traditional forms of physical therapy and natural healing that has taken place in recent years. Natural methods of treatment, or, as it is called, non-pharmaceutical medicine, are gaining ground continuously with new factors such as environmental pollution, daily life anxiety, smoking, etc., considered responsible for most diseases and premature ageing. It has been scientifically proven that health tourism products serve as a defense for good health and also make an important contribution to preventive medicine. It is worth noting that in Germany, Italy, and France, preventive medicine relies to a large extent on hydrotherapy from an early age.

As for demand, modern trends focus on experienced travelers who demand personalized services, products, and experiences, [8], [16], [17].

These individuals demand high quality products and aim to combine local products with the services they choose. Many consider wellness centers to be places of socialization and meeting, as they were in previous historical periods, [18], [19], [20], [21].

Those who choose these destinations belong to both genders. Their average age is around 44 years, with a noteworthy upward trend in the age groups of 30- 45 and 45-60. They belong to the middle and upper socio-economic classes and are mainly employed in office jobs. They typically opt for complex products (e.g., connection with traditional local cuisine or sports activities, etc.). There is a particular emphasis on products and facilities with a distinct identity, such as signature treatment centers, like a wellness centre featuring products like mastic or olive oil, Thai massage, etc.

Therefore, destination holiday packages at these centres are often combined with the offer of other touristic services of leisure, rejuvenation, sports (such as skiing, sailing, horseback riding, tennis, etc.), and cultural activities of high social life (such as cinema, theatre, music festivals, etc.). The rational behind this is that these destinations target not only patients but also the companions of patients, as well as to other visitors, usually of higher income levels. Besides, a prolonged stay at these resorts is required, longer than conventional tourist resorts, to demonstrate the results of a specific therapy to which individuals are subjected, especially if it involves specialized treatments (such as anti- inflammatory therapy, stress therapy, psychotherapy, physiotherapy, movement therapy, relaxation, dietary therapy, sleep training, body posture research, aesthetics, etc.). Therefore, the mandatory stay of visitors for a certain period of time in health tourism centres (e.g. 21 days in France, 21-28 days in Germany, 12-18 days in Italy) requires the creation not only of a suitable atmosphere for relaxation and rejuvenation of the body, but also the development of additional activities and attractions for tourists to engage in during their free time.

Thus, this leads to the creation of complexes with both general and specialized infrastructure and the appropriate environment required for long-term tourism, including green parks, gardens, rivers, lakes, clinics, treatment centres, suitable equipment, specialized doctors, treatment-related accommodation, controlled diets, etc. all contributing to the effectiveness of the specific therapy, [22], [23], [24].

In recent decades, globally, there has been a promotion of therapies that showcase the respective country as the most specialized. As a result, a strong brand is created, establishing the particular country in the broader market and differentiating its offered product, [25], [26], [27], [28]. Indicatively, examples

include treatments that are promoted as "national products", like Swedish massage, Turkish hamam, American aerobics, Alpine wellness, Hungarian Mud, Australian aboriginal, Balinese boreh, Chinese acupuncture, Dead sea Salts, Finnish sauna, and others. In Greece, wellness resort therapies that are promoted are based on local products such as olive oil and mastic.

The Tables and Figures of this article are indicative of both the dynamics of wellness tourism on a global scale and the complex nature and structures that constitute it. More specifically, Table 1 (Appendix) presents the most popular treatments in terms of wellness tourism across various types of facilities, [29].

Beauty care activities are the top choice of wellness tourists, regardless of the type of facilities. They are followed by sports activities and facilities where one can combine wellness with leisure activities. In addition, activities in wellness resorts and spa tourism complement the group of the most popular activities. These services/activities are easily identifiable and represent a product for which specifications and operating standards can be established.

Table 2 (Appendix) presents the range of wellness facilities as they are configured in 2023, alongside with the most popular activities. Hotels (city and resort hotels) are most associated with providing massage and signature treatments, [29].

In Table 3 (Appendix), the geographical distribution of individual forms of wellness tourism. In particular, concerning Southern Europe, the majority of wellness facilities consist of wellness resorts and hotels, a fact that aligns with the growth of these facilities, particularly in Greece, over the last decade, [30].

Over the past decades, the Greek tourism advertising campaign has highlighted and promoted special interest tourism with specific references to forms such as spa tourism, wellness tourism, etc. The choice of advertising and promoting these specific forms of tourism agrees perfectly with the trends observed in the European tourism market, showcasing the dynamics of the wellness tourism market at both the European and global levels. After all, the motivation of wellness is now one of the most considerable factors influencing the final choice of the traveler's final choice, [31], [32], [33], [34]. In hierarchy, it approaches motives traditionally related to sun and sea, leisure, relaxation, contact with nature, and culture (Table 4, Appendix), [35].

Regarding the number of wellness tourism trips on a global scale, this is reflected in Table 5, Appendix, [30].

Travelers engaging in wellness tourism made 819.4 million international and domestic wellness trips in 2022, marking a significant increase compared to the levels in 2020 and 2021. Similar to travel expenditures, wellness tourism trips had not yet recovered to their pre-pandemic levels in 2022, reflecting the overall gradual recovery of the global tourism market.

According to the research findings, all regions have rebounded from the pandemic, but North America, Europe, and the Middle East-North Africa have shown the greatest resilience and growth from 2019 to 2022 (Table 6, Appendix), [30].

In particular, in 2022, North America ($1.9 trillion), Asia-Pacific ($1.7 trillion), and Europe ($1.5 trillion) together represent 90% of the total global wellness economy. Per capita expenditures on wellness are significantly higher in North America ($5,108) and Europe ($1,596) than in other regions of the world.

Moreover, it is crucial to note that some of the wellness sectors are "export industries" (i.e., selling services to people who are not residents of the country where the business is located). For example, approximately 26% of total wellness tourism expenditures come from international trips; likewise, a significant portion of revenue in thermal/mineral springs and certain types of spa resorts comes from international visitors. Therefore, not all the wellness expenditures presented in Table 6 for each region are from residents of that specific region.

Seven of the eleven wellness tourism sectors have fully recovered from the pandemic, with the market size in 2022 surpassing the levels of the year 2019 (Table 7, Appendix), [30].

More specifically, seven out of the eleven wellness sectors declined in 2020 due to the pandemic. Wellness tourism, thermal/mineral springs, and spa tourism were the sectors most negatively affected in 2020, and these three sectors also exhibited the slowest recovery post-2020. All eleven sectors have shown positive growth trajectory in 2021 and 2022, although only seven have fully recovered to their pre-pandemic levels (see further discussion below). Personal care and beauty, healthy eating, nutrition, weight loss, and physical activity constitute the largest sectors of the wellness economy; together,

these three sectors represent 56% of the entire global wellness market in 2022. Wellness tourism and public health, preventive care, and personalized medicine comprise the remaining of the top five major sectors. Undoubtedly, wellness tourism was one of the fastest-growing sectors in the wellness economy before 2020, but it was also the sector most negatively affected by COVID-19 pandemic. Now, there is a gradual recovery observed from 2021 to 2022, following the relaxation of pandemic-related travel restrictions, and a recovery in the overall tourism market has occurred (Table 8, Appendix), [30].

From the research results, it emerges that the top twenty countries represent 85% of the global wellness tourism market for the year 2022. Among the top twenty, three-quarters of them have nearly recovered or surpassed the level of wellness tourism expenditure prior to the 2019 pandemic by the year 2022. Countries that have significantly lagged in recovery include China, Thailand, South Korea, Japan, and India.

Greece, despite its long history in the development of spa tourism and remarkable progress in the wellness tourism market, is not among the top 20 countries in the global ranking. This may be due to the inadequate strategy followed by the central tourism administration regarding the organization and promotion of special alternative types of tourism in general and wellness/spa tourism specifically.

Regarding the type of facilities concerning wellness tourism spa businesses on a global scale, this is depicted in Table 9 (Appendix), [30]. From the research results, it emerges that dominant positions in the wellness tourism market are held by hotels and spa resorts, which offer a complex tourism product enriched with wellness and spa tourism services. This is followed by "Day/Club/Salon Spas", primarily associated with beauty care services.

The survey showed that the most popular destinations are Europe, Asia, and North America, where almost 82% of the facilities are concentrated (Table 10, Appendix), [30].

Health tourism has, through a centuries-old tradition, been identified with the classical model of therapeutic tourism, while demand was mainly limited to domestic markets, resulting in the degradation of the supply.

This fact is directly related to the international distribution of tourist flows, within the Mediterranean zone, which is characterized by the formation of centre-periphery relationships with the developed countries of central Europe, from which arrival rates are high in the total arrivals of the Mediterranean countries. Through a "system of images" the Mediterranean was promoted as sun, sea, freedom, entertainment, "the society of leisure free from any obstacle" and "a return" to antiquity and the roots of Western civilization that evolved into the current technocratic civilization, a sender of tourists.

As a consequence, Mediterranean countries have developed rapidly and established themselves as mass resort tourism destinations. The rapid growth of tourism and the resulting economic benefits, such as increased incomes, employment, and other sectors of the economy, led many Mediterranean states to make efforts for its further promotion and development. In this context, during the 70s and 80s, the objective of tourism development programmes was to double tourist arrivals in order to achieve income and employment growth.

However, even in cases where things followed this trajectory, the over-optimistic forecasts were contradicted as the final performance and benefit of tourism in the region were lower than expected. The consequence of this fact has raised doubts regarding the economic benefits of tourism, not only in the Mediterranean but also internationally. As the author states in [36], "there has been a general questioning of certain basic axioms concerning the relationship between growth and economic growth. In the case of tourism, the doubts were reinforced by the belief that its development entails more significant social and cultural impacts than the development of other economic sectors". Among other things, criticism focused on the continuous globalization of the mass model and its spread to a vast number of regions, and the fact that economic benefits are not linked to the massification and standardization of services.

At the same time, significant rearrangements are gradually taking place in the characteristics and motivations of tourists themselves, as well as in the choices of the social groups and entities that influence the development of tourism. These re- arrangements have strengthened the development of special and alternative forms of tourism, which gradually occupy a significant percentage of the total activated demand, as evidenced by their particularly large number, [37]. The increasing importance and position of specific forms in the global tourism market are reinforced as the new social and consumption patterns that have emerged become gradually the standards of the modern middle classes of developed countries and

strengthen the incentives that activate them.

Based on these international concerns and controversies, many Mediterranean countries realized that the increase in tourists in absolute numbers should not be the sole objective, and that the qualitative characteristics play a significant role, not just the number of tourists. As a result of this realization, there was a re-adjustment of their tourism policies, and efforts were made to attract high-income classes of tourists.

Nowadays, it is observed that both health tourism centres and thermal spa tourism centres attract people of all ages due to the general trend of individuals towards a philosophy of healthy living and traditional forms of physical/natural therapy. This holistic approach to health, emphasis on prevention, and imperatives for the proper use of leisure time have led to a diversification of demand and the emergence of a claim for new tourist products.

In this context, efforts to diversify the tourism offerings of Mediterranean countries are included. In recent years, several of these countries have created modern health and spa tourism centres, in view of the fact that the development of health tourism is increasing steadily, as natural nutrition, healthy living, and physical health become new social models and decisive factors in an image of social advancement.

The diversification of health tourism demand characteristics has led many Mediterranean countries with a tradition in spa tourism to diversify the characteristics of their tourism product, creating high-standard tourist resorts in place of spas in order to attract segments of an emerging market. Italy, in particular, has moved rapidly in this direction, while Spain, Israel, Cyprus, Turkey, Croatia, Portugal, Greece, Tunisia, Morocco, and Egypt seem to be following the same path at a fast pace.

4 Trends in the Demand and Supply of Wellness Tourism Focused on Thermal Springs in Greece

Greece has a strong tradition in the demand for spa tourism services, which is supported by funding from insurance funds and subsidies for therapeutic programmes in the context of social tourism.

These subsidies, however, have led to the identification of health tourism with the traditional model of spa tourism, primarily targeting elderly individuals with low income levels, who undergo hydrotherapy for the rehabilitation of chronic diseases. As a result, there has been no comparable expansion in the demand for spa tourism services from broader segments of the population, in terms of age group and income level, as observed in other European countries.

The demand for spa tourism in Greece is characterized by pronounced seasonality, especially in major spa towns. The majority of bathers primarily arrive in September, followed by August, in contrast to what happens in the rest of tourism, where the peak month is August. The average length of stay for individuals is around 13-14 days, similar to what occurs in the rest of tourism.

Capturing the dynamics of tourism demand related to spa and wellness tourism is not easy and certainly cannot be accurate. This is partly due to the existing legislative framework that does not allow for a clear depiction of activities and, of course, to the non-systematic maintenance/update of statistical data by central bodies such as the National Statistical Service and the competent committee for thermal tourism of the National Tourism Organization (NTO), which has been inactive in recent years but has been reactivated since 2012. The statistics of Table 11 (Appendix), [38], refer to the number of visitors and the number of treatments carried out during the year 2018.

Undoubtedly, the declining trend of spa tourism in Greece is attributed to the same reasons observed abroad, mainly to the competition arising from the pharmaceutical industry and the reluctance of doctors to recognize hydrotherapy as a medical method. Also significant in the declining trend of spa tourism in Greece has been the lack of relevant advertising and public information from the media (television, radio, newspapers, magazines, etc.), both domestically and internationally.

4.1 Characteristics of the Supply of Spa Tourism in Greece

Greece boasts a large number of springs with diverse physicochemical composition of waters suitable for the treatment of various diseases. The thermal springs emerge in areas with remarkable natural environments, and in many cases in coastal areas, which have evolved into important holiday resorts, such as Loutraki, Edipsos, Ipati, and Kamena Vourla. The current state of supply in Greece is characterized by the underutilization of infrastructure and its

traditional form, allowing it to cater to a specific type of elderly and low-income clients. Another characteristic of spa tourism in Greece is its pronounced seasonality, since the thermal baths of the thermal springs are open only during the so-called bathing season, which extends from May to October.
Thermal springs can be found in all regions of Greece, whether they are exploited, exploitable, or not. Figure 1 (Appendix) presents a distribution of the springs in the regions to highlight the dynamics of the country's natural wealth. The existence of springs does not automatically imply that they can be exploited directly. On the contrary, for various reasons, their potential is not maximally utilized, not only where the natural resource exists but also where traditional spa towns are located, [38].

While a plethora of springs is located in Central Macedonia and Western Greece, the majority of organized and accessible thermal tourism centers are situated in Central Greece (Figure 2, Appendix), [38].

There is a direct or indirect correlation among investments related to the broader concept of wellness tourism. Specifically, investments made in Greece involve not only the construction of specialized rejuvenation centres but also the expansion in the wellness sector within existing hotel units. The Hotel Chamber of Greece lists 171 hotels providing wellness services. Of these, it is worth noting that 74 are five-star hotels, 45 are four-star hotels, while the remaining hotels belong to lower star categories. This is related to the sustainability and maintenance costs of the infrastructure: larger hotel complexes attract a greater number of visitors, as mentioned earlier, but they can more easily manage the operating and maintenance costs of wellness service units. In any case, however, the criteria for inclusion in this list are not always clear, leading to discrepancies between actual facilities and the characteristics they are said to possess.

In most thermal springs operating in our country, services focus on therapy rather than rejuvenation. In other words, these are centres of thermal-therapy tourism rather than wellness, health, and natural living. The forms of hydrotherapy applied include bathing and clay therapy, drinking therapy, and inhalation therapy.

Regarding the facilities and the overall infrastructure, the country's thermal springs exhibit significant shortcomings. There are important spa towns that have infrastructure that can be modernized through parallel interventions to improve the superstructures. Edipsos, for example, boasts a modern hydrotherapy and physiotherapy unit, a clinic, a gym, a fitness centre, walking areas, conference rooms, exhibition halls, and a reception area, but lacks high-standard hotel accommodation.

The municipal thermal centre of Loutraki, which was renovated in 2009, serves as a model of rational investment led by local government, while the renovation of Thermae Sylla in Edipsos represents an example of commendable private investment. At the same time, across Greece, thanks to a previous development law, investments in the renovation or expansion of facilities have been made, especially in 4*-5* hotel categories, offering thermal tourism and wellness tourism services.

Finally, it should be noted that there are springs with thermal waters that have not been officially declared by the Greek National Tourism Organization, since their water properties have not been fully explored, leaving them untapped.

5 Conclusion

Greece, with its traditional spa towns and natural thermal resources, can focus on developing special interest tourism in the field of wellness and thermal tourism, provided the appropriate investments are made to improve relevant infrastructure and redefine the product in order to successfully reposition itself in international markets.

Attempting a retrospective look into past years, during the 1990s, efforts were made to attract private investments for the construction of thalassotherapy centres through increased subsidies provided by the development laws for projects of special tourist infrastructure. The result of these efforts was the creation of modern thalassotherapy centres in Greece in areas such as Crete and Attica, as well as in hotels in already touristically developed destinations. These centres were mainly targeted clients of high-income.

However, individual investment efforts and fragmented small-scale improvement projects in hydrotherapy facilities are not sufficient for the overall restructuring of the offering, as they are not supported by a parallel network of supportive actions for further promoting spa tourism. Significant problems continue to hinder the full utilization of the market potential for thermal and wellness tourism market. In particular, the Greek market needs to invest in the following:

Scientific certification of the reliability and

effectiveness of the therapeutic methods followed.

Promote research and systematization of statistical data regarding the characteristics of demand and supply.

Modernization of the legislative framework concerning the specifications and organizational structures of health tourism.

Creation of suitable personnel through the upgrading and specialization of medical and paramedical studies in the field of hydrotherapy.

Adoption of know-how and successful practices from the international and especially the European area.

Gradual shaping of a new image for spa tourism through coordinated promotion and marketing efforts, aiming to create a more autonomous and qualitatively high demand.

Greece as a tourist destination possesses the following characteristics that can contribute to its promotion/emergence as a centre for health/spa and wellness tourism: a) Excellent thermal resources, b) stable, mild climate, c) attractive natural environment, and d) rich cultural and historical tradition/heritage. Additionally, it has a fundamental comparative advantage since in most of the country's thermal springs, the water is "naturally" pumped, unlike in many European countries where it is pumped artificially. The thermal springs are located in areas with a good climate and unique natural beauty. The sea surrounding our country is also an important element that offers further utilization opportunities through the creation of thalassotherapy centres.

In conclusion, the current destination status of Greek spa towns (which is mainly for therapeutic purposes only) should be expanded. The primary objective/goal is to exploit their potential in order to broaden the range of their activities and become tourist attractions for people of all ages for most months of the year. Given that most of the springs combine mountain, sea and warm climate, this constitutes an ideal asset with many opportunities for utilization and promotion as reputable health tourism centres for long-term tourism for all ages.

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Conflict of Interest

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APPENDIX

Table 1. Popular types of therapies in WT Types of therapies

Beauty treatments	Rituals (saunas / steam rooms)
Dental services	Spa & wellness hotels/resorts Evidence based
medicine / natural healing	Spa cruises
Leisure & recreational spas	Sports & fitness
New Age	Spiritual or wellness oriented festivals Nutritional and
detox programmes	Surgical trips
Occupational wellness	Thalassotherapy
Plastic surgery	Therapeutic recreation
Rehabilitation	Yoga and meditation

Source: [29]

Table 2. Categories of facility types and popular activities/treatments in WT (2023)

Different types of spa & wellness facilities worldwide	
Clinic	Mineral springs spa
Club spa	Medical spa
Airport spa	Wellness hotel resort
Thalasso hotel/spa	Day spa
Lifestyle oriented spa	Spa hotel / resort
Holistic retreat	Hotel spa (urban)
Medical (spa) hotel	Resort spa Destination spa

Source: [29]

Table 3. Geographical distribution of wellness facility types (2022)

	Leisure & recreation spas	**Medical (therapeutic) hotel/clinic**	**Medical (surgical) hotel/clinic/ hospital**	**Wellness hotel & resort**	**Spa/ Wellness cruise**	**Holistic retreats/ Ashram**	**Hotel & resort spas**
South Europe	24%	6%	4%	29%	7%	1%	29%
Central & East Europe	19%	27%	8%	27%	3%	2%	14%
West Europe	22%	18%	14%	25%	1%	1%	19%
North Europe	39%	11%	10%	18%	3%	3%	16%
South America	20%	8%	18%	17%	4%	8%	25%
Central America	14%	10%	19%	17%	12%	2%	26%
North America	19%	6%	30%	12%	5%	1%	27%
Australia, New Zealand & South Pacific	27%	4%	11%	20%	6%	4%	28%
Far East	13%	7%	12%	17%	1%	35%	15%
South East Asia	11%	7%	14%	13%	5%	32%	18%
Middle East	13%	8%	22%	14%	7%	10%	26%
Africa	18%	4%	8%	16%	4%	13%	37%

Source: [30]

Table 4. Incentives for Wellness Tourism Incentives

Wellness / Health Recovery	Contact with nature
Sun / Sea	Sports
Relax / Leisure	Culture / Religion
Travel to cities	Visiting friends & relatives

Source: [35]

Table 5. Wellness Tourism Trips by Region (2019-2022)

	Number of Wellness Tourism Trips (millions)				Average Expenditures Per Trip
	2019	**2020**	**2021**	**2022**	**2022**
North America	221.9	140.8	184.1	213.5	$ 1,250
Europe	333.5	175.9	232.2	300.6	$ 834
Asia/Pacific	309.9	133.7	148.1	242.4	$ 351
Latin America/Caribbean	51.7	25.2	34.7	47.2	$ 623
Middle East/North Africa	11.9	4.8	6.2	10.1	$1,354
Sub-Saharan Africa	7.5	2.7	2.9	5.7	$ 878
Total	**936.4**	**483.0**	**608.2**	**819.4**	**$ 794**

Source: [30]

Table 6. Wellness Economy by Region (2019-2022)

	Wellness Economy (US$ billions)					Average Annual Growth Rate	
	2019	**2020**	**2021**	**2022**	**Per Capita 2022**	**2019-2020**	**2020-2022**
North America	$1,551.1	$1,463.1	$1,692.3	$1,901.4	$5,108	-5.7%	14.0%
Asia/Pacific	$1,589.8	$1,468.5	$1,653.7	$1,698.1	$399	-7.6%	7.5%
Europe	$1,293.9	$1,133.4	$1,383.7	$1,469.7	$1,596	-12.4%	13.9%
Latin America/Caribbean	$297.3	$219.0	$263.7	$314.4	$476	-26.3%	19.8%
Middle East/North Africa	$122.2	$110.5	$126.0	$145.4	$273	-9.6%	14.7%
Sub-Saharan Africa	$77.6	$69.0	$73.9	$82.6	$68	-11.0%	9.4%
Total	**$4,931.7**	**$4,463.5**	**$5,193.3**	**$5,611.6**	**$706**	**-9.5%**	**12.1%**

Source: [30]

Table 7. Wellness Economy by Sector (2019-2022)

	Wellness Economy (US$ billions)				Average Annual Growth Rate	
	2019	**2020**	**2021**	**2022**	**2019-2020**	**2020-2022**
Personal Care & Beauty	$1,066.3	$924.2	$1,048.2	$1,088.7	-13,3%	8.5%
Healthy Eating, Nutrition & Weight Loss	$911.3	$948.7	$1,046.2	$1,079.3	4.1%	6.7%
Physical Activity	$875.9	$746.8	$927.1	$976.3	-14.7%	14.3%
Wellness Tourism	$720.4	$350.6	$466.8	$650.7	-51.3%	36.2%
Public Health, Prevention & Personalized Medicine	$358.2	$537.2	$600.9	$610.9	50.0%	6.6%
Traditional & Complementary Medicine	$486.6	$449.6	$502.4	$518.6	-7.6%	7.4%
Wellness Real Estate	$225.2	$274.0	$341.2	$397.7	21.6%	20.5%
Mental Wellness	$130.2	$142.6	$165.5	$180.5	9.5%	12.5%
Spas	$113.8	$69.9	$82.1	$104.5	-38.6%	22.3%
Workplace Wellness	$52.2	$47.9	$49.6	$50.6	-8.2%	2.8%
Thermal/Mineral Springs	$65.7	$39.9	$45.4	$46.3	-39.2%	7.7%
Total	**$4,931.7**	**$4,463.5**	**$5,193.3**	**$5,611.6**	**-9.5%**	**12.1%**

Source: [30]

Table 8. Wellness Tourism: Top Twenty Destination Markets in 2022

	Wellness Tourism Expenditures (US$ billions)					Average Annual Growth Rate		Number of Trips
	2019	2020	2021	2022	Rank in 2022	2019-2020	2020-2022	(millions)
USA	$263.5	$147.3	$198.7	$255.9	**1**	-44.1%	31.8%	195.4
Germany	$73.5	$31.2	$48.5	$70.2	**2**	-57.5%	49.9%	61.6
France	$34.7	$22.1	$28.9	$35.5	**3**	-36.4%	26.9%	36.1
Austria	$18.9	$11.9	$11.4	$19.5	**4**	-36.8%	27.9%	16.7
Switzerland	$15.5	$9.4	$11.0	$17.7	**5**	-39.7%	37.3%	11.3
Japan	$26.6	$10.3	$10.6	$17.6	**6**	-61.4%	31.1%	34.5
Italy	$14.5	$7.5	$10.9	$15.7	**7**	-48.3%	44.6%	11.6
United Kingdom	$15.1	$4.9	$11.4	$15.6	**8**	-67.6%	78.7%	23.6
Australia	$14.0	$7.9	$9.9	$14.4	**9**	-43.9%	35.4%	11.9
Mexico	$12.5	$5.9	$10.2	$13.8	**10**	-53.3%	53.3%	17.5
Spain	$10.8	$3.5	$6.1	$11.4	**11**	-67.7%	80.3%	18.5
China	$34.4	$10.7	$16.0	$11.2	**12**	-68.9%	2.3%	40.4
India	$13.3	$3.5	$4.5	$11.0	**13**	-73.6%	76.8%	95.3
Canada	$13.9	$7.1	$6.8	$11.0	**14**	-48.8%	24.2%	18.1
Thailand	$16.9	$4.2	$2.0	$7.8	**15**	-75.1%	35.7%	10.4
Denmark	$3.8	$4.3	$4.9	$6.0	**16**	12.6%	18.4%	6.3
South Korea	$8.3	$4.4	$5.0	$5.4	**17**	-47.2%	11.3%	20.0
United Arab Emirates	$2.8	$2.1	$2.9	$5.4	**18**	-26.3%	61.2%	1.9
Portugal	$4.4	$3.0	$4.1	$5.3	**19**	-32.7%	34.2%	5.8
Turkey	$5.7	$1.5	$3.2	$4.8	**20**	-74.4%	81.9%	9.2

Source: [30]

Table 9. Wellness spa-tourism enterprises by type of facility (2022)

	Spa Establishments	Spa Revenues (US$ billions)
Hotel/Resort Spas	80,423	$49.0
Day/Club/Salon Spas	67,935	$32.7
Destination Spas & Health Resorts	2,735	$8.0
Medical Spas	6,998	$6.6
Thermal/Mineral Spring Spas	9,345	$5.1
Other Spas	13,739	$3.1
Total	**181,175**	**$104.5**

Source: [30]

Table 10. Wellness spa-tourism enterprises by region (2022)

	Spa Establishments	Spa Revenues (US$ billions)
Europe	63,194	$41.0
Asia/Pacific	53,627	$22.1
North America	31,841	$28.2
Latin America/Caribbean	16,926	$6.7
Middle East/North Africa	8,762	$4.4
Sub-Saharan Africa	6,825	$2.0
Total	**181,175**	**$104.5**

Source: [30]

Table 11. Statistical data of thermal springs (visitors & therapies) for 2018 Statistical data of Thermal Springs (2018)

People	17.492
Tickets (therapies)	208.863

Source: [38]

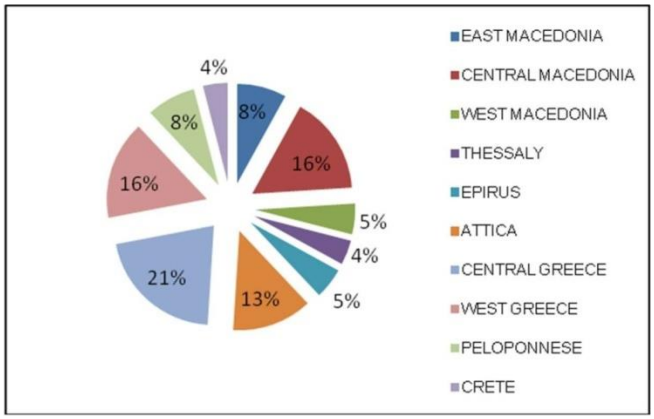

Fig. 1: Distribution of thermal springs by region
Source: [38]

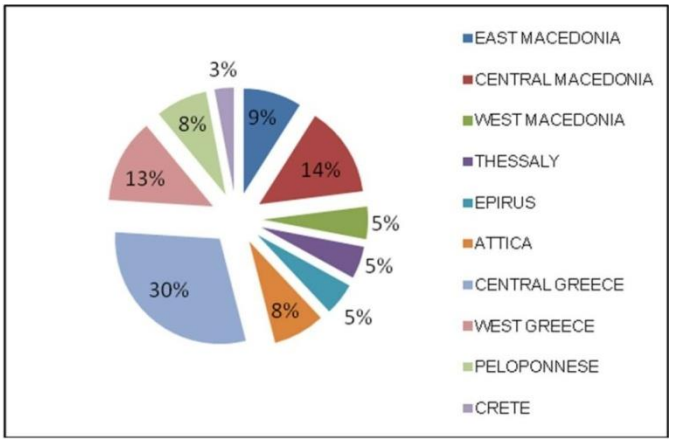

Fig. 2: Organised medical tourism centres by region
Source: [38]