



Brief Information on health tourism and HEALPS2 project

D.T3.1.1 Training Material on Innovation Model and Tactical Toolset

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Introduction

Diversity, i.e. variety, should more than ever make up tourism development in the Alpine region. Those who succeed in recognizing the strengths of their own region and deriving innovative and authentic offers from them create a differentiation from other destinations. An undisputed strength of the Alps is the unique natural and cultural landscape - waterfalls, dense forests, pure mountain air, alpine meadows full of flowers and herbs, and much more. Promoting their beauty is one strategy, recognizing their healing power and developing health tourism offers from it is a successful strategy.

Topics such as health and well-being, strengthening of the immune system, healthy lifestyle are in vogue - and not only since COVID-19. In addition, we live in a wedding of civilization diseases such as stress, noise and stimulus overload and lack of exercise, which find their origin in an increasingly urban lifestyle. It can be assumed that these tendencies will intensify even more in the coming years, so that focusing on the target group of health seekers is a future-oriented decision for alpine destinations. But how can communities and regions approach this path?

The network of municipalities is working on this very question in the HEALPS 2 project with 10 partners from all over the Alpine region. Among them is the Paracelsus Medical Private University in Salzburg (PMU) as lead partner, which has been conducting research in the field of eco-medicine for many years to prove the healing power of the Alps with clinical studies. It is thanks to this research that there is medical evidence of the good feeling after a long hike, or that the Krimml Waterfalls are a state-approved healing resource for asthma.

Together with pilot regions from all over the Alpine region, HEALPS 2 has developed a planning tool that can be used to analyze and evaluate regions. The focus is on identifying existing natural healing resources. Finally, the process ends with various future scenarios for health tourism marketing. The tool also contains a compilation of helpful information for interested regions, e.g., how to get from a healing resource to a health tourism product. This model supports long-term, strategic planning in regions. Alliance in the Alps tested the tool in three pilot regions and worked with regional stakeholders on their strategy. All materials are available in the four main alpine languages.

In addition to the direct work in and with the pilot regions, a network "Healing Power of the Alps" is being developed and established. This network brings together interested destinations, regions, municipalities, and stakeholders, who exchange information at regular meetings and drive the topic forward. In addition, recommendations for action at the political level have been developed to anchor the topic of sustainable health tourism in national and international strategies.

Definition of health tourism

Healthcare is a robust industry, which is tightly related to other sectors such as travel and tourism, wellness and information, communication, and technology. The merging of health care and travel sectors has seen it become a prominent movement in the past decade or so. It has created a phenomenal enhancement in human mobility worldwide. In fact, the concept of healthcare travel has its history dating back to the ancient times when people travelled places, searching far and wide, for the best healthcare services.

In the modern era, healthcare traveling has evolved to include well-being enhancement and leisure, as patients require time to recuperate and recover. The evolution has obligated destination marketers to relook into the purpose of healthcare travellers when visiting a destination. The combination of health care, travel, tourism, and wellness concepts eventually created the concept of health tourism. The term, "health tourism" or "medical tourism" has been used since the 17th century. In fact, health tourism, medical tourism and wellness tourism are commonly used interchangeably, and perhaps it is essential to note that each of the terminologies is, in fact, different. Health tourist, thus, in this context, is defined as tourist who travel elsewhere to seek and receive health, medical and/or wellness services for different reasons.¹

Health tourism is a subsector of general tourism that comprises medical, wellness, and spa tourism. Medical tourism involves people travelling expressly to access medical treatment. People travel for wellness tourism to maintain or enhance their personal health and well-being. Spa tourism focuses on healing, relaxation or beautifying of the body that is preventative and/or curative in nature. The three forms of health tourism (medical, wellness, and spa) reside on two parallel meanings: 'illness-health-wellness' and 'curative-preventative-promotive'. Medical tourism is associated with curing illness; wellness tourism promotes personal well-being and spa tourism is positioned in between, aiming to prevent illness, and wanting to sustain health. Wellness and spa tourism are also associated with certain types of facilities offered at "wellness centres" and spa destinations, while medical tourism focuses on (non-tourism) medical facilities.

Health tourism could therefore be defined as those forms of tourism which are centrally focused on physical health, but which also improve mental and spiritual well-being and increase the capacity of individuals to satisfy their own needs and function better in their environment and society'.²

In the scope of a definition of health tourism described above, a new category called "Nature-Based and Health-Promoting Tourism" should be added and described as well. Basically, the recommendations always refer to the development of nature-based and health-promoting tourism that is evidence-based. In this context, evidence-based health tourism' is defined as a temporary movement of a person to a place, where he or she finds a particular intervention for a specific health condition in a holiday setting that will have beneficial effects and promote health and wellbeing based on the best available current scientific research.³

¹ Brian Kee Mun Wong, Sarah Alia Saáid Hazley

² M. Smith & Puczko, 2015, p. 206

³ Pichler et al. 2017

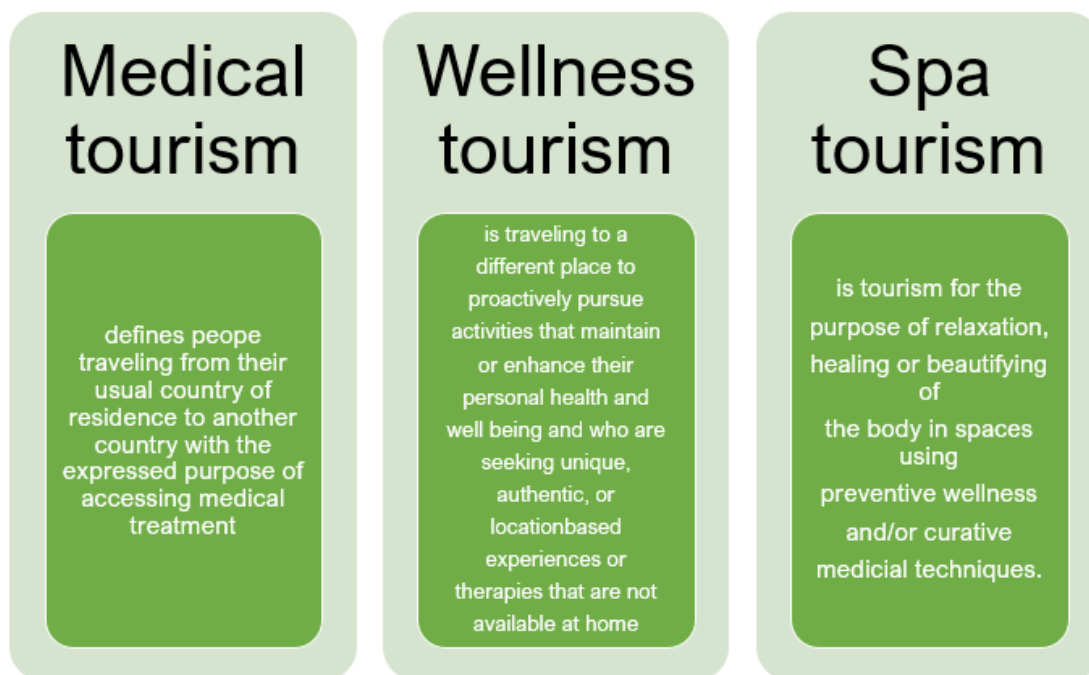


Figure 1: Types of health tourism⁴

While “Global Wellness Institute” include spa tourism under wellness tourism (GWI, 2017), the European Parliament study on health tourism considers spa tourism as a separate type of health tourism combining medical and non-medical elements, and thus situated between medical tourism and wellness tourism at the other end. **Illness is related to medical tourism**; an example being citizens with a medical condition who seek treatment. Wellness tourism can be perceived as promoting services to healthy citizens who want to enjoy a healthy holiday. Prevention may be linked to spa tourism that appeals, for example, to people with chronic disease or medical conditions. **Thus, while in the case of medical tourism, suffering and illness are part of the experience, wellness tourism entails enjoyment, health, and rejuvenation — with spa tourism involving both medical and non-medical services.**

Health tourism in the EU

Worldwide, the wellness economy, that includes wellness tourism and spa tourism, saw high strong pre-pandemic time grew rates for every sector between 2017 and 2109, where each market hit a record valuation. In those years, the wellness economy grew 6.6% annually, a significantly higher rate than global economic growth (4%). In the pandemic year of 2020, the wellness economy contracted by 11%, nearly four times more than the declines in global GDP (-2.8%). However, the 2021 report on The Global Wellness Economy (Global Wellness Institute), predicts the high growth of wellness tourism (21%) and spa tourism (17%) in the period of 2020 – 2025.⁵

In the EU, health tourism lacks reliable figures and credible data sources, with definitional issues contributing to a wide range in the figures available. Nevertheless, it could be estimated that the total volume of health tourism in the EU reached at 56.0 million domestic arrivals and 5.1 million international arrivals (from all over the world), totalling 61.1 million health-tourism arrivals in the EU for 2014. This is health tourism with the main objective of wellness, spa, and health.

⁴ Ratcliff Christina, 2017

⁵ Global Wellness Institute (GWI), 2017

The health tourism share of all EU arrivals is 4.3% (international plus domestic). Germany, France, and Sweden are key players in EU28 health tourism, with 56% of all health tourism arrivals and 58% of all departures. With two-thirds to three-quarters of the total market, wellness tourism dominates EU health tourism. Health-tourism revenues total €46.9 billion in the EU, which represents 4.6% of all tourism revenues and 0.33% of the EU28 GDP. More than three quarters of the EU health-tourism revenues are contributed by just five countries: Germany, France, Poland, Italy, and Sweden.⁶

The pursue of innovation in health tourism

Although the crisis caused by the Covid-19 pandemic, tourism is still one of the most important and fastest-growing economic sectors at an international level. The lack of tourists had huge consequences on the overall tourism economy, including health tourism enterprises. Nevertheless, the relationship of these enterprises with the healthcare system provided some opportunities to continue operations, with the need of further promoting innovation in this industry. Health policies and tourism market trends are addressing the health tourism industry as one of the main pillars in the development of many regions and countries, as it promotes growth, creates jobs, attracts investment, and boosts exports.

Innovation is considered essential to the growth and long-term sustainability of tourism companies and destinations, with continuous innovation taking place to improve competitiveness, but especially the tourists experience and safety with new product offerings. Industry stakeholders are under pressure to continuously deliver new offerings and providing more, faster, and bigger experiences to remain competitive. Yet, some stakeholders are still reluctant towards innovating their value offers, often due to the financial burden or the fear of possibly losing some authenticity in the healing treatments or activities, by radically changing the participant experience in a negative way.

Tourism experiences must be “meaningful” to produce wanted innovation potential. The notion of ‘meaningful tourism experiences’ herewith incorporates the values of the three generations of experience economy (i.e., staged experiences, co-creative experiences, transformative experiences) in fostering: (a) pleasurable and enjoyable experiences designed for many tourists; (b) personalized and extended interactions with the tourists and other tourist stakeholders; and (c) life-changing transformation for a few individuals. In this sense, innovation initiatives in health tourism destinations should integrate the engagement of all relevant stakeholders and addressed to implement holistic offerings that produce meaningful experiences of health, wellness, and tourism.

HEALPS2 project

Tourism is a major engine for job creation and a driving force for economic growth and development in the Alpine programme area. Yet alpine tourism is currently experiencing challenges such as climate change and is often only focussed on specific regions. Global trends such as a thirst for nature-based experiences and increased health consciousness hold considerable opportunities for developing innovative nature-based health tourism value chains. To fulfil this potential, the HEALPS2 project provide policymakers, regional developers, Alpine regions and SMEs access to innovation knowledge and to implementation tools.

The target groups to which the Training Toolkit is addressed are primarily tourism planners and developers, but in an intermediate way it should also be used by target groups such as: local, regional, and national public authorities, sectoral agencies, interest groups including NGOs, higher education and research institutes, SMEs, business support organisation, European Economic Interest Grouping (EEIG) and European grouping of territorial cooperation (EGTC).

⁶ Ratcliff et al. 2017

The HEALPS2 project is built on the ARPAF project HEALPS and the aim is to improve framework conditions for utilising Alpine natural health resources by developing health tourism products and service chains. Lessons learnt from existing innovative, but fragmented cases will be elevated to a transnational level. Supported by the combination of the latest research results with digital solutions, the nature-based health tourism approach tested in pilot regions and the experiences then translated into relevant tools for Alpine regional development. By engaging quadruple helix stakeholders, cross fertilisation between tourism, health and other relevant sectors and co-learning is stimulated at transnational level. This shared knowledge at various scales facilitates framework conditions for value generation based on location-bound Alpine assets. HEALPS2 allow transnational & transversal knowledge transfer from academia to regions and SMEs. Thus, the project contributes to the positioning of the Alpine Space as globally attractive health promoting place.

The main added value of HEALPS2 is the bundling & translation of R&D as well as existing knowledge into adaptable strategies and hands-on tools for Alpine regions to facilitate innovation and transnational cooperation in health tourism and related sectors. The project translates HEALPS' outputs and experiences already made into tailor-made processes & tools and strategies. Methodologies for the identification of need-based transnational cooperation developed in the project strengthen alpine cooperation and help overcome regional short-comings.

Project relevance

Tourism is a key sector for Alpine economic development and job creation yet is experiencing significant challenges incl. a traditionally weak innovation capacity due to its spatial fragmentation, lack of access to knowledge & little transversal cooperation. Growing markets for health tourism coupled with location-bound natural alpine health resources hold considerable innovation opportunities for unique nature-based health tourism services & transnational cooperation. By including stakeholders from various sectors (not just tourism & health) a nature-based health tourism approach can act as innovation driver in Alpine regions. It can provide new impulses for extending seasons as well as for tourism development in peripheral destinations. To fulfil this potential, the scope of resources must be analysed, framework conditions for innovation must be improved and stakeholders from different sectors & levels must be involved leading to an Alpine health tourism innovation strategy.

Nature-based and health-promoting tourism can add value and unlock new possibilities for Alpine cooperation. To maximise this potential, the project follows a collaborative approach to the development of strategies and hands-on tools. In the ARPAF project HEALPS, health benefits of Alpine resources were analysed & best practices were identified. These outputs are the basis for the development of an innovative application to assess regional situations regarding nature-based health tourism. Regional health tourism policies were evaluated, specific needs & strategic success factors were identified for implementing a collaborative approach in innovation modelling for Alpine health tourism. Carried out in regional & transnational quadruple helix stakeholder groups this modelling leads to alpine-wide adaptable strategies and techniques including a unique ICT-simulation tool. Policy recommendations prepare the base for more innovation-driven tourism projects across the Alpine Space in the future.

Project objective

The overall objective of HEALPS2 is to develop and improve framework conditions and tools for a better utilisation of Alpine-specific natural health resources for the development of innovative tourism products and service chains. It connects academia, different business sectors such as the health sector, tourism, and local service providers, as well as innovation and transfer agencies to jointly implement new business models that improve value creation across sectors in Alpine destinations. This The overall objective of HEALPS2 is to develop and improve framework conditions and tools for a better utilisation

of Alpine-specific natural health resources for the development of innovative tourism products and service chains. It connects academia, different business sectors such as the health sector, tourism, and local service providers, as well as innovation and transfer agencies to jointly implement new business models that improve value creation across sectors in Alpine destinations. This transnational and transversal approach is built on unique Alpine natural health resources and strengthens the Alpine territorial innovation capacity.

The project will result in improved conditions for the development of innovative health tourism value chains incl. cross-sectoral & transnational links. Alpine regions -spec. sectoral agencies & public authorities- will have access to hands-on techniques to integrate unique Alpine assets & their sustainable valorisation in tourism strategies



Information on the entire HEALPS 2 project can be found on the project website [HEALPS2](https://www.healing-alps.eu) and www.healing-alps.eu.