

## Present and perspectives for health tourism – spa services in Romania

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### Abstract

The current paper aims at assessing the extent to which spa tourism developed in Romania after the fall of the communism, and to investigate the typology of Romanian spas in order to identify the drawbacks and opportunities of this sector from the supply perspective. The wellness offer (day spas, destination spas, medical spas, mineral spring spas and hotel spas) and the territorial distribution of spa centres within the country are analysed. The current trend is to diversify the offer, with numerous projects for day spas and destination spas within towns, and even resorts offering accommodation, sport and entertainment facilities, as well as spa facilities and programmes. Most of the spas in Romania are focusing only on wellness, less than 10% of them offering advice regarding nutrition, and only few meditation. The balneary spas, capitalizing the mineral and thermal springs, have failed to meet the demands and standards of the international market, thus losing the fame they enjoyed before 1990.

**Keywords:** *Health tourism, spa services, wellness, Romania*

### Rezumat. Actualitate și perspective în turismul pentru menținerea sănătății – serviciile spa în România

Lucrarea de față are drept scop prezentarea stadiului actual al serviciilor spa din România, după înlăturarea sistemului comunist și investigarea tipologiei spa-urilor din România pentru a identifica punctele nevralgice și oportunitățile pentru acest sector. În cadrul studiului se analizează oferta de wellness (spa de zi, destinații spa, balneo - spa și hotel spa), precum și distribuția teritorială a centrelor spa în cadrul țării. Tendința actuală este de diversificare a ofertei, cu numeroase proiecte pentru spa de zi și destinații spa în cadrul orașelor mari, apărând chiar resort-uri ce oferă servicii integrate de cazare, sport și divertisment, precum și facilități și programe spa. Cele mai multe centre spa din România pun accent doar pe componenta wellness, mai puțin de 10% dintre acestea oferind consiliere privind nutriția, și foarte puține punând accent pe meditație. Stațiunile balneare, care valorifică izvoarele minerale și termale, nu s-au putut alinia la cerințele și standardele existente în prezent pe piața internațională, pierzând prestigiul pe care îl aveau înainte de 1990.

**Cuvinte-cheie:** *turism pentru menținerea și refacerea sănătății, servicii spa, wellness, România*

### Introduction

In 2012, the international tourist arrivals exceeded the 1 billion mark for the first time in history, and growth is expected to continue over the next years. More than 500 million international tourists (52%) reported travelling for holidays, recreation and different types of leisure, while travel for visiting friends and relatives, healthcare and religion accounted for almost 27% of all international travel (WTO, 2013). Apart from the increasing number of international tourists and revenues, tourism industry is facing an unprecedented segmentation of the tourism market, favouring the niche tourism segments.

Health tourism includes activities from three different domains – health, as it uses thermal, mineral or sea water for healing purposes, tourism (spending the free time for recreation purpose) and sport (fitness centres, pools, spa facilities).

A relatively new niche segment within the travel and tourism industry is wellness tourism, despite the fact that spa practices date back to antiquity and that during the 18th and 19th century 'taking the waters' became common practice for aristocracy. Nowadays, wellness is a strong consumer trend and the wellness tourism is growing faster than the

overall tourism industry (Global Wellness Institute, 2014), the spa industry becoming the world's largest leisure industry (Cohen, 2008). As the schedule of more and more people has become frantic, and the rhythm of life is ever more accelerated, going to spa is seen as a prerequisite for staying healthy and looking good (Frost, 2004).

### Literature Overview

The wellness concept and its entire philosophy was coined by the American doctor H. Dunn in 1959, when in his paper entitled High-level Wellness for Man and Society, he argues that 'man is a physical, mental and spiritual unity' (p. 789), consequently wellness being achieved by overlapping these three levels. Years later, Dr. Jack Travis emphasized the illness-wellness continuum concept, pointing out that even in the absence of a physical disease, an individual may lack wellness due to anxiety, depression or other conditions (Travis & Ryan, 2004, Travis, 2005), pioneering the wellness movement in the late 1970s.

With respect to tourism, the wellness concept can be acknowledged starting from the definition of the WHO (health is a state of complete physical, mental and social well-being and not merely the

absence of disease or infirmity), but extended to include not only the physical, mental or social dimension, but also the sexual, emotional, cultural, spiritual, educational, financial, environmental, ethic and existential one (Cohen, 2008, p. 8). Wellness is related to a proactive approach, incorporating attitudes and pursuits that prevent disease, improve health, enhance the quality of life and bring a person to increasingly optimum levels of well-being (Global Wellness Institute, 2014). Wellness is a dynamic status, providing the greatest resilience to stress and disease, as 'it is the multidimensional state of being well, where inner and outer worlds are in harmony: a heightened state of consciousness enabling you to be fully present in the moment and respond authentically to any situation from the deep inner well of your being' (Cohen & Bodeker, 2008).

The Research Institute for Leisure and Tourism at the University of Berne defines wellness tourism as „the sum of all the relationships and phenomena resulting from a journey and residence by people whose main motivation is to preserve or promote their health”.

If, in the beginning, the wellness concept implied the use of natural springs, either hot, or mineral ones (Erfurt-Cooper, Cooper, 2009), after the 2nd world war, the focus shifted towards nutrition, weight control and meditation (Weiermair & Mathies, 2004). In Europe, wellness tourism is based on four main pillars: physical activities, vital cuisine, programs for pampering guests and leisure (Lebe, 2006).

Given the rapid expansion of the wellness attitude in the developed economies and the fact that the spa industry is becoming a global phenomenon, researchers have been focusing lately not only on health tourism as a whole (Hall, 1992, Goodrich, 1994, Garcia-Altes, 2005, Smith & Jenner, 2000, Borman, 2004), but also on medical tourism (Connell, 2006, DeArellano, 2007, Hall, 2011), and wellness tourism as distinct niche sectors, providing information on past and future trends (Weiermair & Mathies, 2004, Messerli & Oyama, 2004, Ritter, 2005, Ellis, 2008, Voigt, Brown & Howat, 2011), best practices, management and marketing strategies (Smith & Puczko, 2009), incorporating wellness concepts into spas (Cohen, 2008, Laing & Weiler, 2008), case studies (Quintela, Correia & Antunes, 2010, Heung & Kucukusta, 2013, Speier, 2011).

As many researchers agree (Bastos, 2011, Ellis, 2008, Frost, 2004), the term spa derives from the Latin expression *sanitas per aquas* – health through water, while others (Erfurt-Cooper, Cooper 2009) argue that the term has derived from the town of Spa in Belgium, where the water from the hot mineral springs was used for medical purposes ever since the 14th century. The definitions for this term differ from one continent to another, and even within the same geographical region there is no

clear definition of what a spa is. The European Spa Association (ESPA) defines the spa and spa resources depending on the local therapeutic resources used for physical therapies (massage, physiotherapy, inhalations, balneological treatments), highlighting the existence of a mineral spring in or in the neighbourhood of a spa centre. According to the International SPA Association, with its headquarters in the United States, the spa 'is a place devoted to overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit', which is not necessarily related to the presence of mineral or thermal waters. 'The spa experience is about one thing: You. Your comfort, your goals and your peace of mind are at the heart of every spa experience'.

The ultimate aim of the spa is to preserve and recover good health, by combining products and services specific for some regions of the world: the ethics of the services, the holistic therapies and spiritual practices from Asia, the European medical know-how and the American commercial approach, focusing on beauty and new experiences, as well as environmental consciousness of tribal cultures (Cohen, 2008).

During the last years, many researchers (Muller & Lanz Kaufmann, 200, Frost, 2004, Chen, Prebensen & Huan, 2008, Nuno Silva, 2010, Bastos, 2011) have focused their studies on the typology and profile of spa goers, due to the ever increasing importance of this sector for the leisure industry.

Tawil (2011), following a study carried on in Great Britain, proposes four categories of spa tourists: the aristocrats (generally older, high-income people, that seek relaxation and rest, vigilant for details, with high expectations), the explorers (those who are curious to experience the spa, generally outside their residence place, that seek apart from adventure new facilities, treatments and new programmes, such as yoga), the socialisers (mainly women that choose a spa center depending on its reputation and recommendations, offering a lot of facilities and treatments) and the budgeters (generally young, low budget, that choose especially the massage and pool – the clients of the day spa).

## Aims

The current paper aims at assessing the extent to which spa tourism developed in Romania after the fall of the communism, given the fact that there is little information about the wellness tourism issues in the Romanian literature and to investigate the typology of Romanian spas in order to identify the drawbacks and opportunities of this sector from the supply perspective.

## Research Methods

In order to locate all forms of spas that are of interest for the current study, we first determined the sample using the characteristics proposed by Bennet et al., 2004, i.e.: the name of the unit must refer to spa or wellness, its activity should be related to the use of thermal or mineral waters, and offer products/ services for the preservation of physical, psychical and spiritual health. Afterwards, we checked for promotional materials and used the internet to see if and how they promote themselves.

## Results

### *Dimension and evolution of this market*

At international level, we may argue that there is even a spa industry, which is one of the most dynamic components of leisure tourism. In the USA alone, in 2010, there existed almost 20,000 spa centers, having over 150 mil. visits in a single year, and a reported income of 12.8 bls US\$, according to International Spa Association (<http://experienceispa.com/media/facts-stats/>).

For Romania, there are no data available for the wellness sector proper, because the statistical yearbooks only include figures about the accommodation capacity and tourists number in balneary resorts. Still, according to a study conducted by Wall Street Journal (<http://www.wall-street.ro/slideshow/Lifestyle/101601/Cine-merge-la-spa-in-Romania-Intre-moft-si-necesitate.html>), the investments in the spa centers in Romania increased continuously during the last years, all the new 4 and 5 star hotels including, from the very beginning, a wellness-spa center. Eden Spa, which is one of the biggest spa operators in Romania, having four centers (three in Bucharest, Orhideea Health and Spa being the biggest spa center in the capital city, and one at Sibiu) reported a total turnover in 2011 of 2 mil.€ only for its own centers.

Many spa centers (day spa, hotel spa) organize team-buildings or signed contracts for collaboration with multinational companies, their web-sites having dedicated sections for corporate, thus addressing a clientele generally aged 25 to 45 years, having leading positions, and high income, since the costs incurred are also high (from 2 to 75 € the massage hour, the price of a monthly subscription starting from 100-150 €, which is quite a lot considering that the average income in Romania is around 500 € (<http://www.wall-street.ro/slideshow/Lifestyle/101601/Cine-merge-la-spa-in-Romania-Intre-moft-si-necesitate/4/Ce-servicii-se-ofera-si-cine-merge-la-spa-in-Romania.html#anchor-of-navigator>)).

Still, the general difficult situation of the Romanian economy led to a certain drawback of this

niche sector, in 2011, the spa market stagnating or even decreasing because many companies had to cut down their expenses, not being able to offer gift vouchers to spa to their employees.

The local spa market is below the international standards, mainly because of the lack of proper training of personnel (there are mainly masseurs and kineto-therapists with limited knowledge in this field) and the volume of services offered did not increased; rather, the market stepped forward due to investments in the industry (Both, 2011). The current trend is to diversify the offer, with numerous projects for day spas and cities spas within towns, and even resorts offering accommodation, sport and entertainment facilities, as well as spa facilities and programmes).

### *Current situation*

According to the Master Plan for the development of health tourism, this sector must cope with five main issues. First of all, there is a continuous degradation of the infrastructure, including the accommodation as well as treatment facilities due to the scarce, if hardly any, investment, sometimes entire resorts being in a state of desolation and decay. The health offer is quite heterogeneous and unevenly distributed, varying from few private hotels and treatment facilities of good quality to highly deteriorated facilities owned by the trade unions. Still, the Romanian spa resorts still preserve the know-how and a good reputation for the rejuvenation treatment, and Romanian tourists are keen of this type of tourism. However, terms such as sanatorium, treatment base are still largely used by practitioners and decision makers, despite the fact that they have a negative connotation on the international market and that they should be avoided.

### *Target group*

Health tourism addresses three categories of tourists: those that want to have a medical treatment (either because they are sick or to prevent from falling ill), tourists that come to enjoy themselves or just for wellness and sport persons, that are interested in keeping fit.

Spa centers are not exclusively for ladies, although almost without exception, any spa centre, regardless if it is a day spa or any other type, includes a beauty centre for the ladies. Still, according to some studies carried on by ISPA, the number and the share of male tourists is increasing worldwide (30% in 2004 from the total number of spa tourists). The managers of some spa centres in Romania have well acknowledged this fact and decided to have separate sections for gentlemen within spa centres, the massage, hammam (Turkish baths) and detoxification being the most popular



choices for men (<http://www.desprespa.ro/SPA/SPA-si-Wellness/Spa-pentru-barbati>).

According to A. Kuhnen, manager of Epoque Spa, a spa center that offers highly personalized services, focused on exotic-oriental body treatments, spa goers are people that pay great attention to their health and want to get away from the daily stress and routine. A spa goer is generally 25 to 45 years old, with various social and job responsibilities, that feel the need to escape and be oneself again.

### Wellness offer/ spa typology

We classified the spa centres in Romania according to the typology proposed by the International Spa Association and Frost (2004):

- Club spa – a facility whose primary purpose is fitness and which welcomes day guest;
- Day spa – offering daily services focusing mainly on pampering and less on fitness;
- Destination spa – a facility whose main purpose is to offer guidance to clients for improving their life style and health, offering professional services and

activities for fitness, wellness education and healthful cuisine;

- Medical spa – a facility employing medical staff that offer medical and wellness products and services;

- Mineral spring spa – using mineral, thermal or sea waters for hydrotherapy and other physical treatments; the balneary resorts in Romania were included in this category;

- Resort/ hotel spa – a spa located within a hotel, with facilities for massage, sauna, aromatherapy, as well as fitness. It must be noted that the spa centres have become a must-have for any luxurious hotel in Romania, being used also as a marketing strategy for attracting tourists to a particular hotel.

For the current study, we did not consider the club spa, as in every town, no matter the population number, there is at least one such facility, offering fitness programmes.

The geographical location of the spa centres in Romania is presented in Fig. 1.

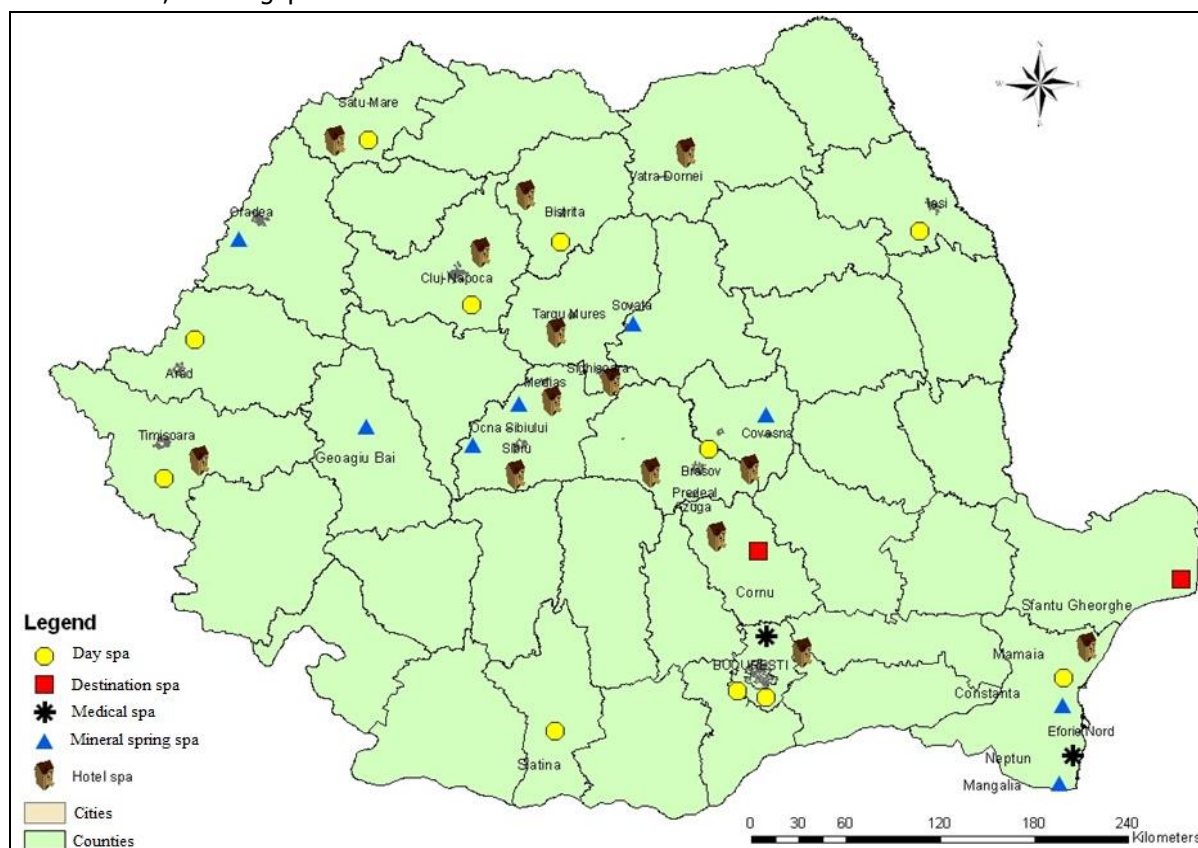


Fig. 1: The location of spa centers in Romania

The survey indicated that most of the spa centres are hotel spas (40%) and day spas (34%) (Table 1).

If at European level, spas have borrowed from the characteristics of those in the USA, emphasizing nutrition, wellness and meditation (Tabbachi, 2008), most of the spas in Romania are focusing only on wellness. Thus, out of the 70 spa centers that were

identified in this study, less than 10% offer advice regarding nutrition problem (Table 2). Beginning with 2012, Green Center Spa organizes at Sfantu-Gheorghe, in the Danube Delta, a programme for body detoxification, under supervision of nutrition and traditional medicine specialists, promoting yoga therapies and raw food.

Out of the facilities offered by the Romanian spa centers, sauna, fitness, pool, jacuzzi, aromatherapy are almost ubiquitous, few of them including hammam (Turkish bath), solar, ice fountain,

consulting room, salt room. The services vary from massage, cosmetic and body treatment, relaxation, nutrition guidance.

**Table 1 Types of spa centres in Romania**

	Day spa	Destination spa	Med spa	Balneo	Hotel spa
Number	24	2	6	10	28
Percentage	34.3	2.9	8.6	14.3	40

**Table 2 Facilities services offered by Romanian spa centres**

	Day spa (%)	Destination spa (%)	Med spa (%)	Balneo (%)	Hotel spa (%)
Sauna	100	100	100	70	100
Jacuzzi	100	100	100	100	100
Pool	75	100	100	80	64
Fitness	100	50	33	80	100
Solar	79	-	33	-	11
Ice fountain	13	-	-	-	11
Hammam	17	-	-	-	11
Consulting room		100	100	60	-
Massage	100	100	100	100	100
Cosmetic and body treatment	100	50	33	80	100
Relaxation	100	100		100	100
Nutrition	4	100			
Other services*	29	100	100	100	14

(data source: authors own determination following survey)

\*Mud wrapping, recovering, reflexing therapy, leaches treatment (Bistrița).

Romanian med-spa centers offer non-invasive medical treatments or light surgeries, connected to injectology or facial rejuvenation, as it is the case of those from Bucharest, anti-ageing treatments, rehabilitation and detoxification (Cornu, Neptun). Recently, there was established the Romanian Medical Tourism Association, the first non-profit association of medical tourism including hospitals, clinics, providers of medical services, travel agencies and insurance companies that is struggling to establish Romania as a country with tradition in medical tourism. The association issues the Romanian Medical Tourism Guide, presenting the main types of medical treatments (focused mainly on dentistry) as well as the accommodation possibilities. The association offers different types of medical treatments, such as dentistry, cosmetic surgery, eye surgery LASIK, IFV, electriv surgery, interventional cardiology, orthopedic surgery, as well as rehabilitation and spa treatments.

According to the Federation of Employers from Romanian Tourism, it is estimated that in 2013, there were approximately 20,000 medical tourists in Romania, the main purpose of the visit being cosmetic surgery and dental treatment, spending around 60 million Eur on health services and accomodation, originating mainly from Uk, Germany, France and Israel (Raducan, 2014).

The hotels that have spa centers are generally 4 and 5 star hotels, very comfortable, with a cosmopolite clientele and certain expectations. It must also be noticed that luxurious hotels that have large conference rooms also include spa centers offering various services, meant to meet the expectations and requests of the guests leading a stressful and busy life, but who are concerned about keeping fit. It is a trend that emerged in the US, after the 2nd world war, spas addressing a generation preoccupied this time with nutrition and weight control (Tabacchi 2008, p. 28).

Balneo spas are an important element of the Romanian tourism sector. According to the web site of the Ministry of Regional Development and Public Administration, and subsequently of the National Authority for Tourism, there are two categories of tourist resorts – of national interest (41 such resorts) and of local interest (including 48 resorts). The guide for balneary spas/ resorts that was presented in London in 2012 includes 34 resorts 'with good chances for development', presenting the procedures and medical treatments they offer, as well as information about the natural therapeutic factors, treatment facilities, accommodation facilities and tourist attractions, being the first material of this type that was achieved in Romania during the last 20 years, following the launch of the new tourism brand of the country. Still for the current

study, we consider that only 10 can fit into the category of balneary spa centers. Apart from the six balneary spas listed on the web site of the Ministry of Regional Development and Tourism (<http://www.romaniatourism.com/spas.html#>), i.e. Baile Felix, Bazna, Ocna Sibiului, Sovata, Eforie North and Mangalia, we consider that another four balneo spas may also be included: Geoagiu Bai, Covasna, Neptun and Dorna Arini (Fig. ), where there are hotels with treatment facilities that were completely renovated and updated, that capitalize the local mineral resources, and have a very diversified spa offer.

Although there is a high number of balneary resorts in Romania, unfortunately they are seen as a place for old and sick people (Master Plan, 2007) because of the emphasis on medical treatments, and the lack of investments for decades, causing poor and decaying special infrastructure. In most of the cases, the social tourism prevails. Balneotherapy was considered for decades a traditional healing technique in Romania, based on bathing, drinking and wrapping therapies, as well as real know-how of this sector, (Cooper et.al., 1995). Just like in other Eastern European countries, the state set up institutions for research, providing the scientific basis of balneotherapy (Dr. Ana Aslan center, for instance). However, since the fall of communism, balneotherapy has failed to be successfully incorporated into the tourism industry, although there is a Master Plan for the Development of Balneary Tourism (2009). Still, thermalism can be tailored to individual needs, addressing higher income clients (Stathi and Avgerinos, 2001).

The most recent strategic plan to develop balneary tourism in Romania dates from 2009 (the Master Plan for the Development of Balneary Tourism); the Master plan should shape the balneology sector, aiming to identify a clear marketing positioning and propose 'an offer that should meet the demands for the products for which Romania can be a good example and stand out'. Thus, the priority network identified by the master plan includes thermal towns (Baile Felix, Baile Herculane, Sovata, Vatra Dornei, Slanic Moldova), medical spas for anti-ageing treatment (just four such centres: Snagov, Bucharest, Mangalia and Covasna), keeping fit- spa and wellness centers (Bucharest).

Lately, the Spa Tourism Employers Association together with the National Tourism Association have developed a partnership with the National Institute of Gerontology and Geriatrics and Ana Aslan Foundation for carrying out a pilot project to revitalize the Ana Aslan brand with two programmes: Live young! and Relaxation. Reblancing. Revitalization.

One of the most difficult problems facing the traditional balneary spas in Romania is the lack of

competitiveness not only on the international market, but also on the national market as well. The lack of investments for more than 20 years in almost all the balneary resorts in the country, the decaying heritage buildings and facilities, prevalence of one, two and three star accommodation facilities, poor general infrastructure and lack of support from the local and regional authorities have all contributed to the bankruptcy of numerous resorts of regional and national importance (Baile Herculane, once frequented not only by the Romanian aristocracy, but also by the European royalty, now lies in decay; and this is just one of the many examples). Once renowned internationally for the treatments they offered, Romania's spas have 'shabby, poor quality treatment facilities which do not give the impression of cleanliness or clinical security' (Cooper et.al., 1995). Most of these resorts are subsisting due to the social insurance policy and subsidies from the Ministry of Health, usually frequented by pensioners with low income.

## Conclusion

The desire to improve one's health and appearance and the opportunity to heal are the main reasons for people visiting spas. Health and related topics, such as wellness, will be one of the most important element of the tourism offer for the next decade, as the European population is growing older and there is a continuous emphasis on staying healthy and young. Moreover, holidaymakers search for various activities during their holidays, health and wellness facilities being targeted by an increasing number of tourists.

A survey conducted by the Global Wellness Institute (2010) indicated that consumers seeking to enhance their wellness are most likely to exercise, eat better and visit a spa, as well as taking a vacation, with positive implications for resort and spa hotels. Currently, four and five star hotels are at the forefront of spa and wellness center development in Romania. If the country is to reposition itself again on the international market for health tourism, wellness tourism is a niche sector that should be aimed at. However, in order to keep the traditional clientele and, at the same time, attract more tourists from the country and from abroad, spas must diversify their offer, targeting a particular segment of tourists: physical fitness (smokers, obese, young mothers), emotional balance, relaxation, mental health, stress reduction.

During the last years, numerous balneary spas of national and regional importance have benefited from massive investments through REGIO Regional Operational Programme, 5th Axis – Sustainable development and promotion of tourism. Still, almost all the funds were invested in the rehabilitation or

construction of medical treatment and wellness and spa facilities, as well as in general infrastructure to improve accessibility. That is why we consider it is compulsory for the near future to stress and improve the offer for leisure activities, meditation, stress reduction and pampering guests, since spa goes 'like to be clients, not patients, consumers, not sick people', carrying credit cards or cash, not diseases (Bastos, 2011).

If Romania will manage to capitalize the know how in the domain and offer health services that will be elegantly packaged, including a wellness component, will have a competitive advantage and will be able to compete on a market that has been continuously diversifying, segmented and where there is increased competition from the well established and emerging destinations.

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