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SOFIA DE SÁ BARBOSA E SILVA

**WELLNESS TOURISM IN SOUTHEAST ASIA
-THE CASE STUDY OF SIX SENSES HOTELS RESORTS & SPAS**

SÃO PAULO
2018

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Thesis presented to Escola de
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as a requirement to obtain the title of
Master in International Management
(MPGI).

Knowledge Field: Gestão e
Competitividade em Empresas
Globais

Advisor: Prof. Dr. Benjamin
Rosenthal

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ABSTRACT

A context of increased demand for wellness tourism is attracting new players in the tourism industry. The concept of wellness tourism has emerged but hasn't broken through yet: it is already defined and presented in the literature and there is a clear growing demand, however, it is not yet totally clear the players' strategy, who are still searching how to refine their offerings. The purpose of the present study is to investigate how significant is wellness tourism to today's consumer needs and how hotels can improve their strategies to better respond to those needs. The study was done with a qualitative case study approach using the Six Senses Hotels Resorts & Spas case and the primary data was collected through a survey and interviews, which were triangulated with secondary data from TripAdvisor.

From the results obtained it is evident that, while the categories qualification during a traditional tourism experience and, concretely, a wellness experience can be similar, the prioritization and, itself, the categories value scale that emerge are distinct from each other. Therefore, it is not possible yet to outline the existence of a well-defined gap between wellness tourism concept and the traditional tourism notion. However, with the growing concern for health and the increasing stress levels, the demand for this type of tourism offerings has the tendency to increase.

The contribution of this work to Six Senses and other related organizations will be a presentation of possible improvements for the strategy to be implemented, so that they can respond more effectively to consumer needs.

KEYWORDS: TOURISM, WELLNESS, WELLNESS TOURISM, HOTEL STRATEGY

RESUMO

Atualmente estamos perante um contexto de crescente demanda por turismo de bem-estar e atraindo cada vez mais players nesta indústria. Este conceito já emergiu, mas ainda não eclodiu: está estabelecido na literatura e existe efetivamente demanda, mas os hotéis ainda não têm a sua estratégia e oferta claramente definida. O objetivo deste estudo é investigar a importância do turismo de bem-estar para as necessidades do consumidor atual e, conseqüentemente, analisar como os hotéis podem melhorar as suas estratégias para responder melhor a esses consumidores. O estudo foi realizado através de um caso de estudo qualitativo do Six Senses Hotels Resorts & Spas e os dados primários foram recolhidos através de um questionário e entrevistas, os quais foram triangulados com dados secundários recolhidos do TripAdvisor.

Através dos resultados obtidos pode-se, por um lado, ressaltar a similitude do turismo de bem-estar com o conceito de turismo convencional na qualificação, isto é, nas categorias apontadas como importantes pelos consumidores, mas, por outro lado, são bem evidentes as diferenças existentes na priorização e hierarquia da respetiva escala de valores dessas categorias. Desta forma, ainda não é possível a definição de uma diferença bem demarcada entre o conceito tradicional de turismo e o turismo de bem-estar. No entanto, com a crescente preocupação pela saúde e com o aumento dos níveis de stress na sociedade atual, a procura por este tipo de ofertas tem a tendência para aumentar.

A contribuição deste estudo, para o Six Senses e para outros estabelecimentos relacionados, é a apresentação de possíveis melhorias nas estratégias implementadas.

PALAVRAS-CHAVE: TURISMO, BEM-ESTAR, TURISMO DE BEM-ESTAR, ESTRATÉGIA DO HOTEL

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1. Introduction

Although the motivation for travelling with the aim of improving the well-being can be traced nearly to the emergence of civilization (Kevan, 1993) it was just since the late 90s that wellness tourism has been discussed as an entirely new concept and has become a niche market inside the tourism industry (Pechlaner & Fischer, 2006).

In this thesis, wellness tourism is defined as a journey that implies a change of location by individuals with the main purpose, in whole or in part, of promoting either their physical, mental or social well-being (Mueller & Kaufmann, 2001).

Even though there has been a significant interest in wellness tourism, reflected by the fact that this sector is growing at twice the rate of the global travel expenditure (Droga, 2018), it remains difficult to draw and implement an effective strategy for hotels due to the specific and complex nature of the services and products being offered. This thesis will try to tackle this issue, by analysing Six Senses' strategy, presented in the case study, versus the TripAdvisor reviews of the corresponding customers, together with the general population's impressions on the concept, represented by the responses given to a survey which was developed exclusively for this study.

The objective of this research and the question put forward, which is the base for my study, is ultimately: How significant is wellness tourism to today's consumer needs and how can hotels improve their strategies to respond better to those needs? This objective will be met through a review of the literature on this topic, together with the use of a case study and interviews and, then, triangulated with the respective consumer reviews in TripAdvisor and the responses given to the survey.

After this brief introduction explaining the relevance of the topic, this thesis, will then, provide an analysis of the development of wellness tourism segment, taking into consideration the Southeast Asia region and, specifically the case of Six Senses. Firstly, in the literature review, the concept of “wellness tourism” is described and discussed in light of previous research papers and people involved in this sector. Secondly, in the methodology, the choice of a qualitative case study is substantiated and the research method and data collection and analysis processes are explained. Thirdly, the whole research results are presented and integrated. Lastly, the final conclusions are described and some limitations of the study are mentioned.

2. Literature Review

The purpose of this literature review is to summarize what has been written on wellness tourism. With that objective, a subset of literature has been selected based on its relevance to the following questions: 2.1) What is the concept of wellness?; 2.2) What is wellness tourism and why and how it is being developed?; 2.3) Who are the wellness travellers?; 2.4) Why Southeast Asia as a wellness destination?; 2.5) What is the role of Customer Generated Media (CGM) and Electronic Word of Mouth (eWOM) in the tourism segment nowadays?; 2.6) What is TripAdvisor and how it affects the tourism market?

The following questions were designed to serve as a solid basis for discussion, in order to meet the main research question of this study “How significant is wellness tourism to today’s consumer needs and how can hotels improve their strategies to respond better to those needs?”.

2.1. Wellness Concept

The concept of wellness was referred and registered for the first time back in 1654 (Weiner & Simpson, 1989). Dunn (1959) was one of the first authors to deliver such a definition of wellness, by describing it as the maximization of health, always with respect and attention for the adjacent environment (Dunn, 1959).

However, the wellness movement as such, only began after the end of the Second World War, mainly as a result of the change of what were considered the primary health needs. With the new technology developments there were a wide range of new vaccines which automatically reduced the risk of death due to infections, therefore, chronic illnesses such as heart related problems, diabetes or cancer, generally associated with a

stressed and tense lifestyle, turn out to be the main health concern of the society. This view triggered the progress of preventive health measures by starting to take into consideration the causes of the illness rather than just the symptoms (Seaward, 1997). The focus started to be on the long-term health promotion rather than on the treatment of the symptoms (Voigt & Pforr, *Wellness Tourism: A Destination Perspective*, 2014). Hence, conventional medicine became just one way to obtain health, whereas the wellness approach turned out to be an holistic opportunity to avoid and to prevent the need of that traditional medicine (Smith & Puczko, 2016).

Following that, an amplified concept of health has continued to foster until it started to encompass every aspect of the individual: the mind, body, and spirit (Donatelle, Snow, & Wilcox, 1999). Coulter (1993) agreed with this conceptualization by defining wellness as a way of life, where mind, body and spirit stay aligned and in synergy with the adoption of a healthy lifestyle (Coulter, 1993). Likewise, Ardell (1985) described wellness as a state of health when the body, mind and soul are all in harmony (Ardell, 1985). From then on, the concept was referred with multiple meanings: as a lifestyle (Hattie, Myers, & Sweeney, 2004), a process for a quest of maximum human functioning involving the body, spirit and mind (Archer, Probert, & Gage, 1987), and a positive psychological state, in the sense that every human being needs to satisfy the three basic psychological needs (competence, autonomy and relatedness) in order to accomplish this state of effective functioning and wellness (Ryan & Deci, 2001).

Recently, the concept of wellness became more expansive and started to be described as an alternative, holistic and positive paradigm of health that comes to be an alternative to the traditional medical approach. This new view brings together the harmony of the body, mind and spirit and describes wellness as a state that is fulfilled when the physical activity is combined with the relaxation of the mind and the intellectual

stimulus (Mueller & Kaufmann, 2001). This symbiotic relationship can also be explained by the fact that without a healthy mind, the body cannot be truly healthy and vice versa (Cochrane, 2008).

2.2. Wellness Tourism and its development

The interest in wellness can be explained as a result of the aging population phenomenon, the rise of incidence of chronic diseases resulting from the increasing stress levels and by the escalation of the health spending, as shown in Image 1 below (Cochrane, 2008). This awareness can also be associated with the search for an answer for the pace of life acceleration we deal nowadays: the augmented workloads are bringing various stress-related disorders, and, wellness tourism is being suggested as one of the possible answers to escape these ailments (Pollock & Williams, 2000).

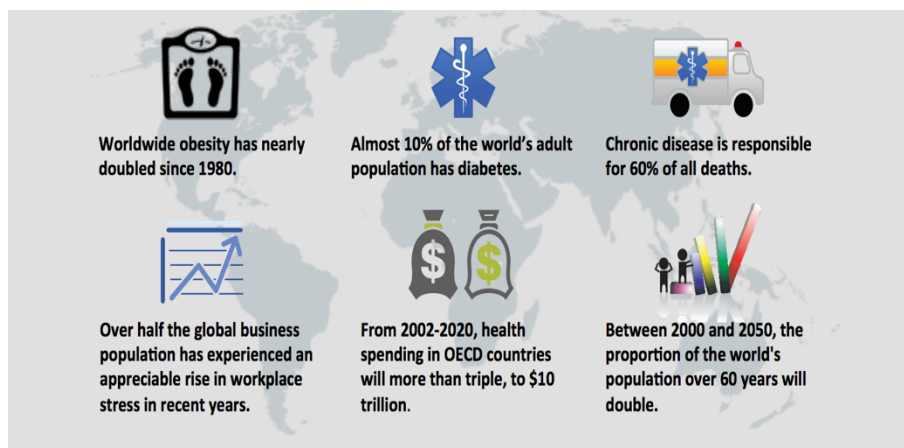


Image 1 – The Importance of Wellness
Source: (Global Wellness Intitute, 2013)

Apart from this explanation, wellness tourism growth can be also justified by some other megatrends such as the increased health consciousness (healthy lifestyles' trend was the basis for wellness tourism demand), the appearance of the inconspicuous consumption movement (where people decide to simplify their lives by trading the high incomes by more quality of time and life) and the great importance given to

individualization with the focus on the self together with the quest for spirituality (Voigt & Pforr, 2014). Another motive behind wellness tourism growing demand is the fact that people nowadays emphasize much more on health care so that they can avoid some diseases which, if not prevented, would probably result in big expenses. So, they adopt a preventive mode, rather than the old traditional curative approach (Prommaha, 2015). These decisions, on whether to adopt a preventive mode or not, arise from the health continuum shown in Image 2 below.

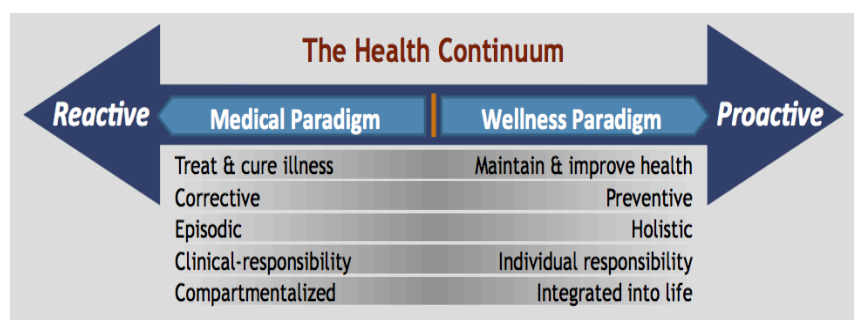


Image 2 – The Health Continuum
Source: (Global Wellness Institute, 2013)

On the later years there has been a deep discussion on this distinction between medical tourism, as an illness-oriented approach which aims be curative, and wellness tourism, which emphasises health promotion and the disease prevention. These two terms are part of a wider concept of health tourism (Smith & Puczko, 2016). Therefore, while wellness tourism is grounded in a history of thousands of years, only recently this concept started to be seen as an alternative new approach to how health care is managed and delivered (Voigt & Pforr, 2014).

Moreover, the focus on the importance of exercise and the recognition that moderation can be better than excess contributed to the increase of wellness tourism trend where the emphasis is placed on the need to slow down, to be more mindful, to decrease the technology use, and to be more connected to nature. Bomar (2013) suggested that the major reasons behind the increased demand of CAMs (complementary and alternative

medicine) which can be directly associated with wellness tourism are the (1) increased costs of traditional medicine, (2) a need and desire for more autonomy regarding healthcare and a greater interest in alternative options, and (3) an increased belief that the traditional medicine is not effective in bringing all the body-mind-spirit needs, and, therefore, a search for a more holistic wellness promotion (Smith & Puczko, 2016).

It is suggested that this evolution of wellness tourism concept has been an ever-changing interplay of two main elements and functions: either the pleasure dimension has been emphasized or the therapeutic element was dominating. To add to these two elements, nowadays, we can observe a third dimension, which is the spirituality (Erfurt-Cooper & Cooper, 2009).

In accordance to Katherine Droga, Chair of Wellness Tourism Institute, wellness tourism can be simply described as any trip where the primary purpose includes activities that enable the traveller to maintain, enhance or kick-start a healthy living and, consequently, increase his/her wellbeing (Droga, 2018). Additionally, according to Mueller and Kaufmann (Mueller & Kaufmann, 2001) wellness tourism needs to imply a change of location by individuals with the main aim of promoting either their physical, mental or social well-being. This choice of location matters because wellness tourists usually search for destinations where there is the possibility of transcendence, nature and healing (De Botton, 2002). Therefore, the natural and unique resources present in each destination are seen as benefits and give, to these places, a competitive advantage (Bushell & Sheldon, 2009).

Nowadays, according to Global Wellness Institute sources, in 2017, wellness travels accounted for 6.5% of all tourism travels but represented 15.5% of total expenditure, which shows that these wellness consumers tend to spend more than the usual traditional travellers (Institute, 2017). In the future, according to experts in this area,

the wellness market is expected to become one of the fastest developing economic sectors (Csirmaza & Peto, 2015). Trend researchers even predict that health and wellness will be crucial, if not the most important, drivers for future business growth and innovations. In the same line, the World Health Organization predicts that health will be the world's biggest industry in the nearest future.

However, as a result of the general lack of inconsistency in the wellness concept, it is difficult to report reliable figures to support all of these predictions. Nonetheless, the following indicators can justify the referred growth in this segment: increased number of specialized wellness travel agencies, creation of relevant wellness travel magazines, appearance of specialized courses in universities and creation of online directories regarding wellness travelling (Voigt & Pforr, 2014).

2.3. Wellness Travellers and their motivations

There are various motivations behind a wellness travel, below Table 1 illustrates some of the main ones and the studies which referred them.

Table 1
The Wellness Travellers' Motivations

Wellness travellers' motivations	Studies mentioning the motivations
Promote and enhance holistic health and wellbeing	(Voigt & Pforr, Wellness Tourism: A Destination Perspective, 2014); (Mueller & Kaufmann, 2001); (Cohen, 2010); (Institute, 2017)
Transcendence	(Voigt & Pforr, Wellness Tourism: A Destination Perspective, 2014)
Escape and Relaxation	(Voigt & Pforr, Wellness Tourism: A Destination Perspective, 2014); (Mueller & Kaufmann, 2001)
Novelty and Indulgence	(Voigt & Pforr, Wellness Tourism: A Destination Perspective, 2014)

Physical health and appearance to promote self-esteem	(Voigt & Pforr, Wellness Tourism: A Destination Perspective, 2014)
Focus on the self	(Smith M. , 2003)
Recreational activities and experiences rooted to the nature	(Chen, Prebensen, & Huan, 2008); (Institute, 2017)
Sustainability and care for surrounding environment, society and future generations	(Cohen, 2010); (Institute, 2017); (Voigt & Pforr, Wellness Tourism: A Destination Perspective, 2014).
Cultural facilities	(Mueller & Kaufmann, 2001)

According to the Global Wellness Institute, this upward growth in the wellness tourism trajectory can be explained by the following three main trends: 1) An increasing of the middle class with available income to be spent on improving their wellbeing; 2) The increasing consumer's interest in following an healthier way of living driven by the higher stress levels and environmental degradation; and 3) An increasing awareness for the environment and future generations, by the increased search for experiences rooted to nature and connected to the wellbeing of both the self, the nature and the surrounding community (Institute, 2017).

Wellness tourists are described as belonging to the LOHAS (Lifestyle of Health and Sustainability) market. These consumers care, not only for their well-being, but also for the environment and adjacent society (Cohen, 2010).

Various studies have suggested that wellness travellers' motivations are multi-faceted (Chen, Prebensen, & Huan, 2008), and Image 3 can serve as an illustration for this trend.



Image 3 – The Wellness Travellers Multifaceted Motivations
Source: (Global Wellness Intitute, 2013)

In spite of this trend, on the whole, wellness tourists' main motivation lies behind preserving, promoting and enhancing their own health (Mueller & Kaufmann, 2001) and, the focus on the "self", is usually important across all the individuals that engage in wellness tourism (Smith, 2003).

According to a study conducted to understand the main benefits pursued by this type of travellers, six factors resulted: transcendence, escape and relaxation, physical health and appearance, novelty, re-establish self-esteem and indulgence. It was also agreed, that, in order to promote this holistic wellbeing, tourists need to stay at least one night in an environmental-friendly and sustainable facility different from their home (Voigt & Pforr, 2014).

In addition, Mueller and Kaufman studied the hotel guests' motivations and expectations to stay in a specific wellness tourism establishment in Switzerland,

concluding that, relaxation, health and cultural facilities were the most important (Mueller & Kaufmann, 2001). On top of this, another study came up with the conclusion that wellness travellers' motivations and needs lie not only on the need for relaxing and healing environments and facilities, but also on the existence of alternative recreational activities, particularly, in contact with nature (Chen, Prebensen, & Huan, 2008).

Besides this motivation analysis, in regard to gender distinction, some studies suggest that there are more women than men interested in this type of tourism and that, usually, these wellness tourists are likely to pursue a wellness-oriented lifestyle back at home (Brown, Howat, & Voigt, 2010).

However, even though it is possible to make some distinction from the general travellers, there is a panoply of different benefits that wellness travellers can intend to pursue, hence, it is very difficult to distinguish a homogeneous group with exactly the same expectations (Voigt & Pforr, 2014).

Nonetheless, according to the Global Wellness Institute, there are two main types of wellness travellers: primary, whose main travel purpose is wellbeing, and secondary, who incorporate wellness while travelling but they do not consider this element as the main reason behind the trip. Regarding the first type mentioned, according to Katherine Droga, there is not a totally defined profile, however the majority are described as 45+ women whose needs range from nature, great food and a wide variety of wellness activities available. However, millennials are seen taking an increased interest over the last years as well (Droga, 2018). Even though there is a distinction between these two types of tourists, both reinforce each other: an individual who usually plans to travel to wellness resorts (primary type) is more likely to choose a hotel where he/she can maintain the wellness routine while doing business (secondary type). In the same manner, an individual who has positive experiences when visiting a spa during a business trip

(secondary) may also be motivated, on a later stage, to plan a specific wellness trip (primary). Regarding the wellness tourist profile, they also tend to have a higher disposable income, be older, more educated and taking longer trips, so their spending is also usually higher than the average tourist (61% more). This spending is segmented, being the major part allocated to the lodging itself, followed by the food, shopping and finally extra activities and excursions (Institute, 2017).

In addition, according to Jeff Romeo, a wellness travel specialist and founder of “Live for Incredible Wellness Travel”, wellness travellers can be divided into the following categories (Romeo, 2018):

- The Active traveller: who is usually a sports fan and praise to have an array of different sports present in their holidays. For them its important the availability and the variety of different sports such as yoga, hiking, biking, water sports and the existence of a fitness centre. The end goal is to have a more active life.
- The Nutritious traveller: they prioritize the availability of local organic eating (Farm to Table), the possibility to attend cooking/nutrition classes and the elaboration and possibility to have personalized diets such as gluten free, paleo, raw, vegan, vegetarian. The end goal is to have a healthier diet and usually to lose weight.
- Mindful/Spiritual traveller: these travellers praise meditation and the disconnection from the daily-life. They search for relaxation and for body healing. The end goal is to disconnect and relax and to try to reconnect deeply to the self.
- The Eco traveller: these tourists are worried about sustainability and usually have a big connection with nature. The end goal is usually a disconnection in pure and raw destinations where environmental concerns are seriously taken.

2.4. Southeast Asia as a wellness destination

In the world we live nowadays, western tourists have the willingness to return to nature and that is the main reason why they are attracted by eastern practices and culture. Asia is able to offer authenticity and genuine practices as well as varied landscapes which seem exotic to the western travellers. Apart from this distinctiveness, Asia is also able to compete on price, as a result of the human labour's low cost in that regions (Cochrane, 2008). Several wellness tourism conceptualizations give a high level of importance to the surrounding environment and natural resources found in Southeast Asia, not only because of the natural ingredients that can be found there, but also justified by the healing power that is possible in this region (Voigt & Pforr, 2014).

According to Katherine Droga, Chair of the Wellness Tourism Institute, Southeast Asia has always traditionally been a strong location for wellness travel experiences due to the lower costs of maintaining a property there and due to its strong connection to nature, which keeps to be the major ingredient that wellness consumers seek when travelling (Droga, 2018).

In accordance to the Global Wellness Tourism Institute, Asia is the leader regarding the number of existing spas, concentrating around 38.819 spas in 2015 comparing to 121.595 that exist globally. This existing number of spas around the world incorporate many different forms, ranging from day spas to hotel/resort spas. The major number is still attributed to the first category mentioned, however, between 2013 and 2015 the major growth was observed in the hotel/resort category. To keep up with this increase, the number of jobs created by spas had been also growing, with Asia adding the largest number of jobs between 2013-2015. Regarding the number of wellness trips and wellness tourism expenditures, it was also Asia who made the most gains. (Institute,

2017). According to these numbers, it can be seen that wellness tourism is gaining momentum in this region.

2.5. The role of Customer Generated Media (CGM) and Electronic Word of Mouth (eWOM) on travellers' experiences

Consumer Generated Media (CGM) can be described as the content created by the end user of this media. Nowadays this sector is one of the fastest growing on the internet and regarding, specifically, the hospitality industry, TripAdvisor can be considered the largest source of CGM, receiving roughly 47 million visits monthly (Levitt, 2013).

In regard to CGM in the travel industry Jeong and Jeon also believe that customers' reviews of hotel experiences through electronic word of mouth (eWOM) are becoming extremely powerful and exert a great influence on the travel decision process. As a result of the CGM marketing power, if the hospitality industry wants to keep up, they will need to start to interact with these online communities, by understanding the expectations of these online customers and the corresponding online evaluations and reviews' system from the eyes of these travellers (Jeong & Jeon, 2008). The electronic word of mouth (eWOM) can be considered a primary tool for travellers who want to analyse prior expectations, attitudes and intentions of different tourism establishments and destinations (Doosti, et al., 2016).

This effect of eWOM on the tourism industry can be justified by its ability to convey important elements and attributes of a specific travel establishment. Hence, eWOM has such a strong relevance and impact to visitor experiences and purchase decisions (Filieri, Alguezaui, & McLeay, 2015).

Thus, taking into consideration all of the mentioned studies, it can be concluded from the existing literature, that eWOM can seriously shape visitor experience, as it

clearly influences decisions, as well as attitudes, concerning whether to visit or not a specific travel establishment or destination.

Therefore, customer's feedback is an important instrument for the hospitality industry, but to understand it accurately is still very challenging. However, TripAdvisor and other reviews' websites are enabling the easiness of this task by providing a larger number of customer feedback available almost instantly to tourism providers. And, in order to respond to this opportunity, many tourism providers are using approaches and techniques to characterize the sentiments founded on those reviews and then, arrive to a more coherent conclusion regarding customer feedback so that customer's experience can, in the future, be better adjusted. The majority of the past studies have described and studied the role and the effect of those online reviews on consumer behaviour and, consequently, on revenues and sales. However very few studies had a focus on the online reviews' content itself (Han, Mankad, Gavirneni, & Verma, 2016).

2.6. The concept of TripAdvisor and its effects on tourism segment

Founded in February 2000, TripAdvisor was an early user-generated content adopter. This American company provides free content for travellers, who are, themselves the content providers. The website itself is mainly supported by advertising and the hotel booking facility that it has incorporated (TripAdvisor, s.d.).

By using the user generated content (UGC), TripAdvisor is able to generate a scale where travellers can select what is the most important element that they want to focus on their travel choice. According to Peter O'Connor user generated content has, nowadays, a huge impact on the consumer purchase decision. In his research he focused on the London market, where he analysed 1042 listed reviews on TripAdvisor and, arrived at the conclusion, that all the hotels present in the sample were reviewed, showing that guest

experiences are becoming more transparent, and, as a result, having huge impacts on consumer decision-making and purchase decisions (O'Connor, 2010).

In accordance to Heather Stimmler-Hall, TripAdvisor can be considered the Google for travellers, where they can find a variety of different reviews by fellow travellers. Therefore” when planning any travelling it is no secret that most travellers will eventually end up on TA when planning their vacation” (Stimmler-Hall, 2016).

Specially for the “independent traveller”, TripAdvisor ranking trigger trust and, as a consequence, is considered a reliable intermediary in the travel decision process (Jeacle & Carter, 2011).

In order to enhance its credibility, TripAdvisor is constantly implementing different techniques such as the use of detecting algorithms, spot checks, and readers’ abuse investigation. And, these efforts, are already having positive results, as, according to a survey by Times Online, 82% of public users trust reviews posted on a travel review sites like those on TripAdvisor (Jeong & Jeon, 2008).

3. Methodology

3.1. Research questions and purpose

The purpose of this study is to present an explanatory research to try to find out the significance of wellness tourism to today's consumer needs, so that possible recommendations can be given to hotels, for them to improve their strategies and respond better to the existent demand.

With that objective, the author went through a sample of customer reviews in TripAdvisor and developed a survey to understand whether wellness is seen as an important element while travelling or not. Additionally, it was explored what strategies are already implemented, using Six Senses Hotels Resorts & Spas as a case-study (through interviews), so that it could be identified what could actually be improved to accommodate both demand (the customers' needs) and supply (the hotel's strategy).

3.2. Research Approach: Method and Design

Research methods can have either a qualitative or quantitative approach. The terms are used to divide the methods of investigation into those which are concerned with obtaining an understanding of a subject (qualitative), and those which are involved in measuring things (quantitative). Qualitative research can be used as an explanatory tool, where the researcher can make a small number of interviews to provide the understanding and explanations that can answer the problem (Hague & Jackson, 1999). A qualitative method is central in studies of managerial performance and marketing activities within organizations hence a qualitative approach seems to be appropriate for this study.

The research design is the guide for the process of collecting, analysing and interpreting observations. It deals with what question to study, what data is relevant, what data to collect and how to analyse the results. There are three types of research designs

used to meet a research objective: exploratory, descriptive and causal. Exploratory research is often used in case studies and involves the discovery of ideas and insights (Yin, 2008). Considering the fact that this study is an analysis of the selected Six Senses case and being based on semi-structured interviews, the exploratory research design was adopted for the study.

3.3. Case study

In accordance to Yin (2008) a case study is used whenever there is a need to understand a social phenomenon because this method enables the researcher to keep and understand the whole characteristics of real-life-events such as organizational and managerial processes. Also, it is indicated when the researcher has little control over the events and when the attention is focused on an incident or phenomenon within a real-life context (Yin, 2008). Additionally, this study has two main levels of analysis, being one the hotel (the case), since it is prescribing strategies, and the other the consumer, as it is describing how the traveller values wellness tourism.

Therefore, for these three mentioned reasons, a case study seems to be the indicated method for the present research. The Six Senses Hotels Resorts & Spas case-study was particularly chosen by its recognition in the wellness sector and, Southeast Asia was selected not only by the fact that these resorts are more expansively developed on this region, but also motivated by the natural and spiritual peculiarities of this zone of the world.

3.4. Data Collection

The data collection process is composed by sources of data needed to solve a study's research problem and can be classified as primary and secondary data, based on three dimensions: 1) whether the data already exist, 2) the degree to which the data has

been interpreted by someone, 3) the extent to which the researcher or decision maker understand the reason why the data was collected and assembled (Marshall & Rossman, 2006). The most common exploratory qualitative methods to collect primary data include focus group interviews, in-depth interviews, observations and surveys. Whereas secondary data is everything which is collected by others for further purposes than the study in question.

The primary data for this study was focused on interviews and a survey. Interviews are one of the most important sources of information for a case study. Interviews may be structured, semi-structured or un-structured. For two reasons, the semi- structured interview was chosen for this study. First of all, the study has a clear focus which makes the semi- structured interviews a good option to address a specific issue. Second, the semi- structured interview is flexible and allows the interviewer to ask follow up questions even though a certain interview guide has been made beforehand. The goal was to maintain informal conversations which were recorded and, later, transcribed for analysis or, in case of the e-mail interviews, were directly answered and written by the participants, however always with the possibility of following up the e-mail with new questions and possible answers (Kvale, 1996).

This section describes the collection of data gathered from interviews and the survey (primary data), triangulated with the data retrieved from user generated data from TripAdvisor (secondary data), which allowed to complete the core of the research objective. The type and amount of data collected is summarized in Table 2 below.

Table 2
Type and Amount of Data Collected

Type of Data Collected	Amount of Data Collected
Interviews	<ul style="list-style-type: none"> Two interviews with two wellness tourism professionals: developed by

	<p>skype and e-mail with a duration of thirty minutes to one hour each;</p> <ul style="list-style-type: none"> • Two interviews with the HR & Training Manager at Six Senses: developed by e-mail with a duration of around two hours in total;
Survey	<ul style="list-style-type: none"> • Answered by 85 people;
TripAdvisor Reviews	<ul style="list-style-type: none"> • Retrieved 422 customer's reviews referred to four Six Senses properties located in Southeast Asia; • Retrieved 436 customer's reviews referred to four non-wellness hotels located in Southeast Asia;

The interviews conducted with the two professionals involved in the wellness tourism sector: Katherine Droga, chair of Wellness Tourism Institute, and Jeff Romeo, a wellness travel specialist and founder/CEO of Live for Incredible Wellness Travel, were carried out to explore how is the wellness tourism sector behaving. Both of the interviews were done through skype and e-mail and lasted between thirty minutes to one hour each (interview protocols can be found in Appendix 7.1 and 7.2). In addition, regarding specifically the case study in analysis, there were two other interviews conducted with the HR & Training manager at Six Senses Corporate Office (interview protocols can be found in Appendix 7.3 and 7.4) with a total duration of about two hours and both done via e-mail, due to the time-zone incompatibilities. All the mentioned four interviews were either recorded and transcript (in case of skype) or directly answered in a written format by the participants (in case of the e-mail interview). All participants were selected, based

on their influence and importance in the wellness tourism sector and in the case-study and gave authorization to be referred in this thesis in a signed formal consent.

Besides, the survey was carried out in order to analyse the importance of wellness tourism for a random audience. This survey was done in the platform “Survio” (questionnaire and corresponding answers can be found in Appendix 7.5) and was answered by 85 people. These people were contacted via e-mail and were selected based on personal contacts: first, the e-mail was sent to a small group of people (contacted directly by the author) who were asked, then, to spread out the survey to their contacts’ network. Therefore, the existence of prior knowledge or any ties with wellness tourism sector was not the goal, justifying then, the randomly selection of the participants. With the obtained answers it was possible to understand, without any bias from prior stays in the Six Senses properties, what people know about wellness tourism and what factors they care the most if they engage in this type of travelling,

Moreover, in order to triangulate the study, an analysis of user generated data retrieved from TripAdvisor was done. In total it was retrieved 422 customer’s reviews referred to the four following Six Senses properties located in Southeast Asia, more precisely, in Thailand and Vietnam: 1) Six Senses Samui; 2) Six Senses Yao Noi; 3) Six Senses Con Dao; and 4) Six Senses Ninh Van Bay. Additionally, it was also retrieved 436 customer’s reviews referred to four non-wellness hotels also located in Thailand and Vietnam: 1) Mandarin Oriental Bangkok; 2) Four Seasons Hoi An; 3) Metropole Hanoi; and 4) The Siam Bangkok. This last sample was selected to work as a control group for the results obtained in the 422 reviews’ analysis. This control group worked as such because, while analysing reviews from these non-wellness hotels the author could understand what is valued in those stays (non-wellness hotels) and compare to the reviews of the Six Senses properties (wellness hotels), to understand if there are any major

differences or, rather, similarities shared by the different types of hotels. The method adopted to select the four non-wellness hotels was based on their similar luxury category as Six Senses (average price per night was used as measure) and due to the fact that their location was on the city centre (rather than on unique and more isolated places) consequently being more attractive to guests who are travelling for business reasons (in contrast to wellness purposes).

This number of reviews were chosen and seemed appropriate to reach data saturation and consequently show credibility to the results. Even though there is not a universal method to reach data saturation, some researchers do agree that data collection and analysis should only continue until the point at which no new concepts or themes emerge and consequently no new codes that translate into uncovered patterns can be developed (Guest, Bunce, & Johnson, 2006). Additionally, regarding this thesis in specific, the number of reviews were also justified specially by the unknown size of the total population (wellness travellers), which lead us to understand that, with a bigger sample, a more rigorous result could be obtained. In addition, due to the time available to collect and analyse the data, these were the biggest possible samples.

Collecting data from these three different sources was necessary to gain background knowledge of the subject as well as structuring a frame for the study.

3.5. Data Analysis

After collecting all necessary data, the data analysis process aims to make sense of the data collected by moving deeper into the understanding of themes and patterns. In order to find out those themes, there was the necessity to invoke the use of coding. A code can be described as a word or short phrase that allegorically allocate a suggestive attribute for a portion of data (Saldaña, 2009).

Regarding this study in particular, these portions of data were collected mainly through the interviews and the TripAdvisor website. The same way a title characterises the main content of a book or a film, a code stands for the key content of a segment of data (Saldaña, 2009). Therefore, coding can be seen as the preliminary step for the data analysis and further interpretation of the study, being not just the label, but also the link between the data collection and the respective further analysis (Richards & Morce, 2007). However, according to Charmaz (2006), coding represents only the generation of the bones for the analysis, so there is the need for further integration so that those bones can be assembled into a working skeleton (Charmaz, 2006)

Therefore, overall, these whole qualitative analysis process needed to imply the steps referred in Image 4 below (Malhotra & Birks, 2007). The detailed explanation of these steps is disclosed in the paragraphs following the image.

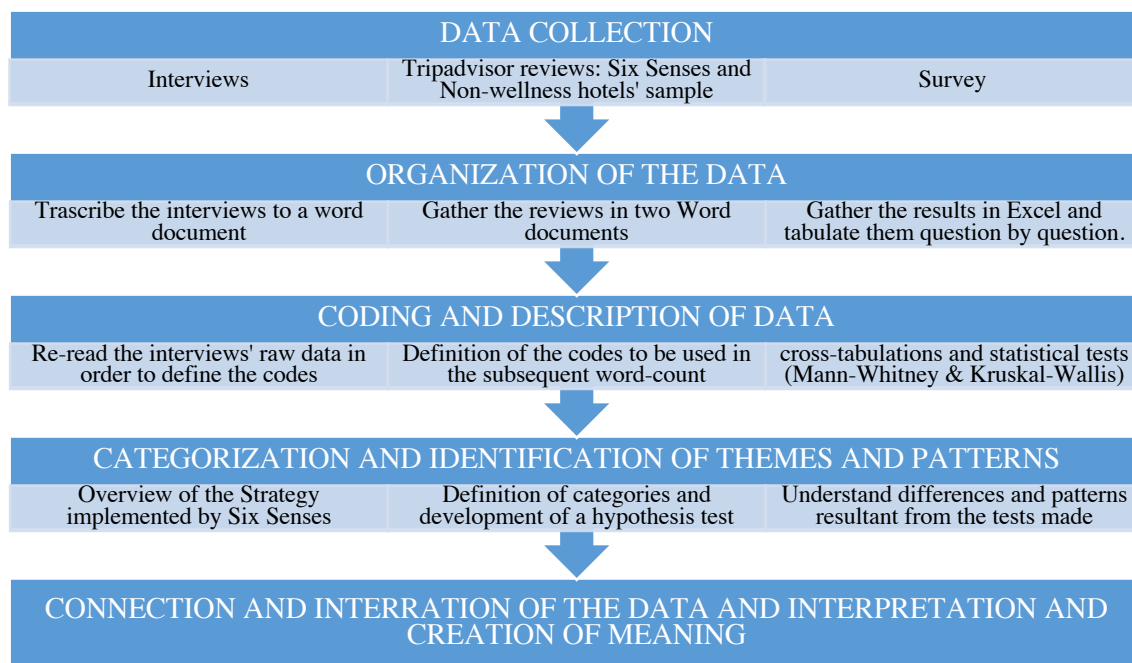


Image 4 – The Steps Implied in the Qualitative Analysis Process

In regard to the Interviews' analysis, after transcribing the interviews to a Word document it was necessary to re-read them so that, from the raw data (interview

transcripts), the most pertinent quotations could be extracted to facilitate, subsequently, the definition of some codes. The codes that emerged can be appointed as the main wellness perks and strategies adopted by Six Senses, which are detailed in Table 3 in Results section.

Concerning the TripAdvisor reviews' analysis, once all the reviews were assembled in a Word document (separately, for the two variables in analysis: Six Senses hotels and the non-wellness hotels sample), it was necessary to revise them in order to gather the words that were most referred (as an example food, service, view, restaurants were commonly mentioned along the reviews). These words can be appointed as the codes that resulted from the coding process in the qualitative analysis. After gathering these words, a simple word-count was done in the respective documents that could translate their frequency along the whole group of reviews. By looking at this list of words (codes) and taking into consideration their similarities, it was possible to develop and define categories (as an example the codes "food", "beverages", "restaurant", "bar", "dining", "breakfast", "lunch" and "drinks" can all be included in the category "Food & Beverage"). This same process was done for all the other categories that emerged in study (detailed in Table 4 in the Results section). The definition of the concrete name/label for the categories resulted from the analysis of different reviews' websites (Agoda, Booking, and TripAdvisor), by analysing what were the categories that they usually use to filter reviews and, in addition, with the analysis of a framework (Image 3 in Literature Review Section) developed by the Global Wellness Institute, where they illustrate the motivations that induce wellness travelling (Global Wellness Intitute, 2013). In order to find possible patterns and gaps between the two variables in analysis (Six Senses versus Non-wellness hotels) it was, then, performed a proportions hypothesis test (detailed in Results section). This test was performed with 95% confidence and, considering that the variables in study

were not continuous, a non-parametric hypothesis test was used. In addition, for the data analysis, it was also used SPSS v. 22 and Microsoft Excel.

Regarding the survey, first, the results were gathered in an excel file so that they could be organized in one-way tables, question by question, to enable the counting of the frequencies of the answers. Then, some cross-tabulations were considered by breaking down the sample into two-way tables, showing the answer of one question as row headings and, those of another question, as column headings. This method enabled associations between the different questions under analysis to facilitate the establishment of possible links and patterns. As an example, question four, regarding what hotels could do to enhance their wellness offerings, was associated with question five, concerning which wellness offerings the respondents believe that actually enhance their hotel stay. This association's analysis, represented in Table 14 in Results section, enabled the understanding, of what hotels actually should do if they want to improve their wellness offerings, by taking into consideration what is already implemented and what still needs to be improved, in the eyes of the customer. In addition, to understand possible differences in the answers given, across the different age groups, it was performed some statistical tests, such as Mann-Whitney and Kruskal-Wallis, better detailed in the Results section.

By the end of the data analysis process, after disclosing the results, the idea is to develop recommendations for Six Senses and to other organizations involved in the wellness tourism segment, by combining and comparing all the literature previously researched with the data and results emerged.

4. The Six Senses Hotels Resorts & Spas Case

Six Senses Hotels Resorts & Spas can be found around the world in some of the most unique and beautiful surroundings. The brand tries to always preserve the local settings and culture in its hotels and resorts, but, at the same time it is able to be always in tune with the wider world by offering the most modern and up-to-date services delivered by experts with a wide background. The first resort was set up back in 1995. And from then on, Six Senses rapidly became recognized as the leader and pioneer in the green and sustainable arena, showing that it is possible to both offer innovative and top-tier facilities and services and still be deeply committed to the ecosystem and local communities.

Nowadays Six Senses have already sixteen different resorts and spas around the world and it is expected to double in size in the next three to five years. Six Senses offers a wide range of holistic wellness, incorporated with the local healing traditions and guided by expert therapists. This holistic approach is related to their understanding that before “connecting to the world around us, we need, first, to reconnect with ourselves”. Six Senses are world-wide recognized by its spectacular settings and design and it is able to offer a unique service and extreme caring attitude, which is extended not only to the employees, but also to the local communities.

Moreover, Six Senses are totally committed to the environment and all its operations embrace this value believing that “sustainability is not about sacrifice, but rather a celebration of abundance”, meaning that the unique environments and cultures experienced by guests are not to be experienced just once, as sustainability will ensure that future generations can still enjoy the Six Senses for years to come (www.sixsenses.com, s.d.).

5. Results

This session begins with the presentation of the Six Senses Hotels, Resorts & Spas strategy's analysis, comprised of two interviews with the brand HR & Training manager, which led to the definition of the main strategic line followed by Six Senses (Six Senses hotels' strategy).

Then, the results obtained from the analysis of the TripAdvisor reviews are presented. In a first stage the main categories that emerged from this analysis are defined (TripAdvisor Reviews: The Categories Definition) and, then, with the categories defined, a word count was done in order to enable a comparison between Six Senses and Non-wellness hotels situated in Southeast Asia (Comparison between Wellness and Non-wellness Hotels).

Lastly, in order to understand if the implemented strategy by Six Senses is aligned with the overall customers' demand, the results from a survey, which was exclusively conducted for the purpose of this study, are presented (Survey Results). This whole process is summarized in Image 5 below:

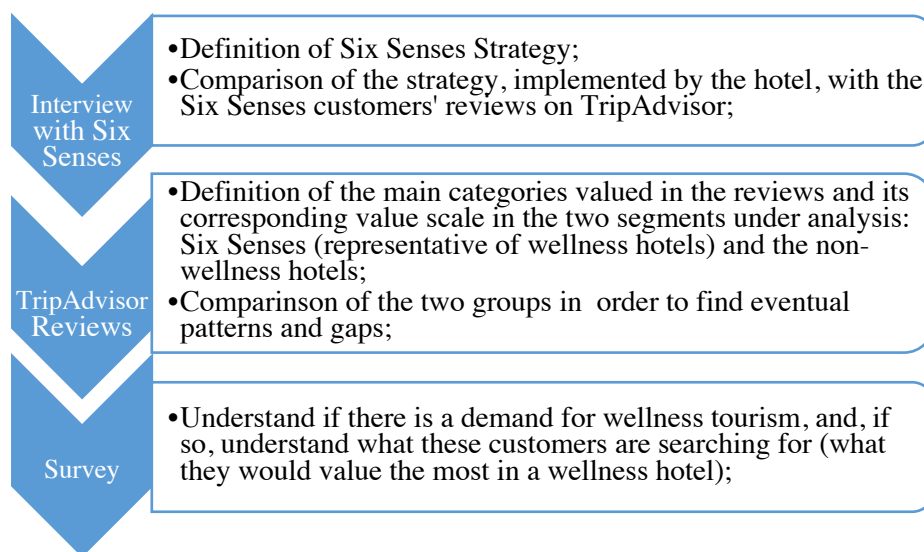


Image 5 – The Main Results of the Study

5.1. Six Senses hotels' strategy

According to the HR & Training Manager at Six Senses corporate office, wellness is a very broad concept that implies an immersive journey where people need to step into a story that is larger than themselves. This means that wellness is all about reconnecting with the inner self, with others and with the world around. This aspect is related to Six Senses DNA, in which wellness and sustainability needs to work together towards the same goal, that's why in Six Senses there is not only a special care for the final customer, but also for the employees (what they name as hosts, for the fact that they are essential for the customer's experiences, which are one of the focus of the brand) and all the surrounding communities. Basically, there is a sense of community with sustainability at its core.

Regarding the sustainability, they are committed to preserve the environment through sustainable operations, by offering organic food and having their own chicken farms inside the properties and by focusing on energy, water, carbon and waste management and projecting its buildings with a whole sustainable design behind. (Six Senses, 2018).

The focus on the guest, can be described by the wellness journey offered, which invites the guests to do as much (or as little) as they like, just depending on their personal needs and goals. The level of service does not focus just to do the right thing, but rather to do it well and with great care, it is all about building strong relationships with the guests through their experiences, so that they can really feel this difference. Customer experience is taken so seriously that when a guest books a room he/she is always assigned to a GEM (Guest Experience Maker), who will be totally and individually responsible for this particular guest's stay and experience. This enables Six Senses to create a greater empathy with the guests and to deliver a very personalized journey, dynamically improving

customer experience by simply making them take time for themselves or by making them experience something new. Consequently, this brings a higher awareness and a greater possibility for positive word of mouth, keeping the brand in the hearts of the guest and making them loyal to the Six Senses brand. According to their internal statistics, for every 100 guests, 30 will be repeats (Six Senses, 2018).

This mentioned wellness journey is usually more attractive when there is the possibility to bring experiences which are meaningful and authentic, therefore, the individuals who visit Six Senses are able to enjoy the local culture and immerse in a wide diverse of activities tied to the roots of the far flung, yet accessible locations, whether in a virgin territory, or adjacent to an UNESCO World Heritage sites, which also enables the development of the surrounding communities. Justified by these remote locations the emphasis falls on relaxation and simply escaping and, part of that escape, includes having memorable experiences, which represent very well the Six Senses philosophy “Delivering out of the ordinary experiences” and translates the uniqueness of this brand: creating places in incredible beauty setting, where people can reconnect and enjoy exceptional experiences (Six Senses, 2018).

Six Senses also enjoyed a growth in their sales over the last years in response to the growing wellness trend. Within the next five years, Six Senses is aiming to grow to the target of 40 properties, according to Neil Jacobs this is an aggressive, but a realistic goal for the future (Chipkin, 2013).

The perception of what really means to be healthy and the willingness to have faster results in shorter time has shifted all the industry. However, even though there is an understanding of this need, Six Senses still believe and try to prospect rather a holistic approach, where the focus is on the long-term benefits instead of a short-term and fast result. Therefore, Six Senses approach goes from core beauty that changes the way

individuals look, to personalized wellness programs that can actually change their life. The brand believes that wellness is all about a personalized journey of self-discovery and admits that every guest will leave Six Senses properties with a better self, whether that is physically, mentally or emotionally. The most difficult task is to cater every need, and that's why it is essential to understand guests' needs before offering them anything (Six Senses, 2018).

Historically Six Senses was founded in Thailand in 1995, and that's the main reason for its bigger expansion in Southeast Asia compared to the rest of the world. However, apart from this main justification, Southeast Asia is also a very rich area in regard to natural resources and to organic and natural cuisine. This enables Six Sense to offer incredible experiences such as the initiative "Eat with Six Senses", in which the guest learns how to nourish the body and the soul through simple cuisine literally from the farm to the table (Six Senses, 2018)

Regarding guests profile who visit Southeast Asia properties, the HR & Training Manager at Six Senses corporate office mentioned three different groups: 1)couples aged between 27 and 38 years old, middle to upper class, well-educated and high income earners (usually they come for honeymoon, anniversary or even wedding and stay on average more than six nights); 2)families with children aged between 31 to 41 with 2 children on average, middle to upper class, well-educated and high income earners who stay on average 4 nights; 3)experienced travellers aged between 41 and 55 from upper class, educated and high income earners who usually stay more than 5 nights. In regard to nationality, most of them are rather local residents or they come from UK, USA, Germany, China and Russia. In terms of gender there is quite a balance and in general the travel motivations to come to Southeast Asia Six Senses properties are the climate,

location, privacy, safety, sustainability, wellness and the possibility for total and deep relaxation (Six Senses, 2018).

However, in accordance to Neil Jacobs, CEO of Six Senses Hotels, Resorts & Spas, the consumer profile is evolving constantly and millennials are becoming a very important generation for the brand. This fact is justified by millennial's increased interest in companies who really proclaim their authenticity, not by just projecting that ideal image, but actually living it in the daily operations. Moreover, Six Senses position in regard to sustainability and wellness are also an attractive point to these young generations, who are increasingly caring about healthy habits and experiences that enable them to really disconnect. According to Neil, this change in the guests' profile are a response to the consumer expectations, which, consequently are the ones that enable Six Senses to be refreshed and keep up to date. The major part of the consumers searches for Six Senses properties with the willingness to reconnect with themselves, their families and the world around and the brand aims exactly for that, by trying to offer unforgettable and authentic experiences that enable to create lasting memories from both shared moments of change and discovery (Jacobs, 2017). As an example of those extraordinary experiences, at Six Senses in Oman, the guests are taken to the top of a mountain when arriving and have the opportunity to paraglide into the lobby to check in. Surprisingly, on average ten guests per day actually opt to do it, proving that these unique experiences are actually a demand of Six Senses type of consumers (Chipkin, 2013).

On the whole, after the interviews with the HR & Training Manager at Six Senses corporate office, it was possible to gather some important insights regarding the strategy followed by Six Senses, its main consumers' profile and the main challenges and opportunities in Southeast Asia. The main strategies adopted by the brand are disclosed in Image 6 below, together with the respective importance attributed by the customers in

the TripAdvisor reviews analysed on the light of this present study, and detailed in the next sections.

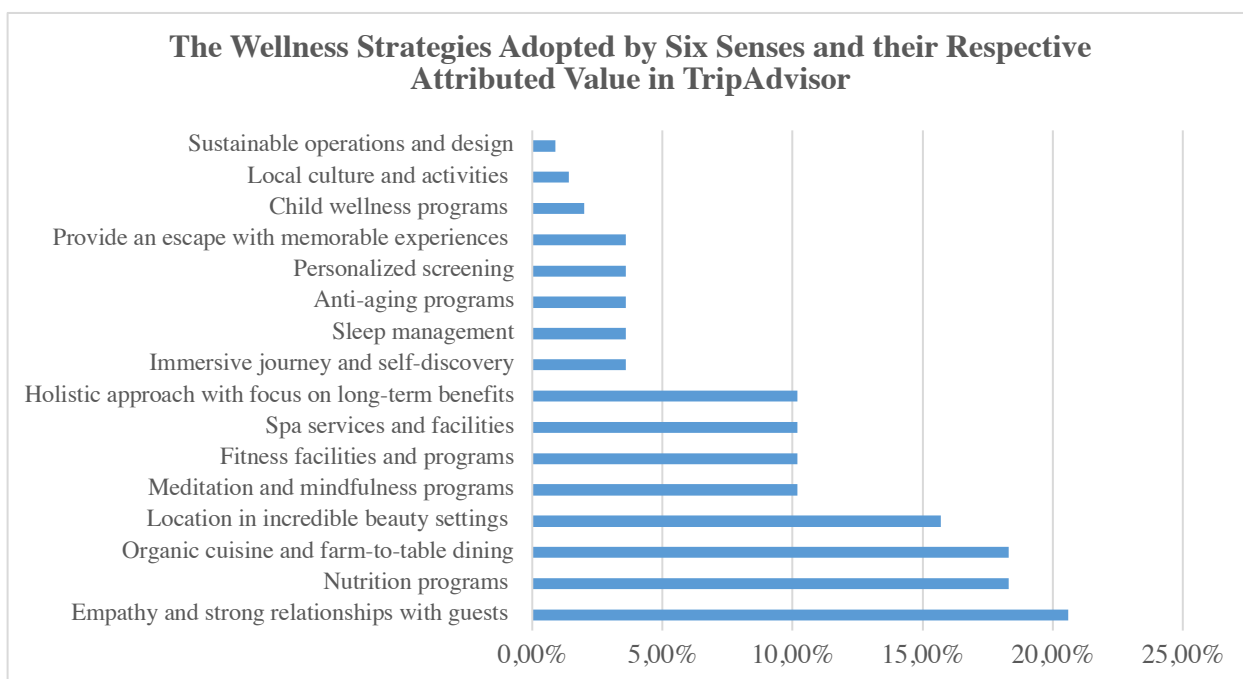


Image 6- The Wellness Strategies Adopted by Six Senses and their Respective Attributed Value in TripAdvisor

5.2. TripAdvisor Reviews: The Categories Definition

For the purpose of this research is the imperative to understand the needs and the benefits that wellness tourists pursue when they engage in wellness tourism.

Wellness tourism can have multiple meanings and tourists' expectations that can vary a lot, therefore there is a need to segment them. But overall, wellness travel can be translated to the following (Yeung, Johnston, & Chan, 2013).

1. Healthy living
2. Rejuvenation and Relaxation
3. Meaning and Connection with the self
4. Authentic local experiences
5. Disease Prevention

However, for the aim of the present study, and in accordance to Six Senses' values and focus, we will consider just the first four points mentioned above, opposed to most of the competitors and remaining wellness hotels brands who just focus on the first two.

It is said that guests have a higher tendency of writing reviews when there is a negative experience behind which they want to emphasise (Han, Mankad, Gavirneni, & Verma, 2016), therefore doing a word count of the positive versus negative sentiments found could lead to some biased results. Therefore, for the matter of this study it was assumed that if a guest refers some specific word/element in the review both in a negative or a positive perspective, it means that he/she value it and, consequently, it can be concluded that this element is seen as a need for the customer. For this study, using the coding technique, already detailed in the methodology section, it was possible to extract a list of words (codes) that could enable the word count, which was done with the underlying assumption that the frequency of a word could translate the personal interest and motivation on that specific element. Therefore, following this line of thought, it was decided, for this research, that the number of references given to some codes (representative of specific hotel attributes) could be translated to the level of importance given to those specifics during the hotel stay. This list of codes could be then segmented taking into consideration their similarities, so that a list of categories, as shown in Table 3 below, could be developed. These categories were then used to perform the comparisons between Six Senses and the Non-wellness hotels sample.

Table 3

Extracted Codes (words) and corresponding categories developed

Categories developed	Codes (Words)
1. Service & Ambiance	service; ambiance; employees; staff
2. Food & Beverage	food; beverage; restaurant; bar; dining; breakfast; drinks; lunch
3. Location	location; locate; view
4. Spa & Fitness & Wellness	spa; fitness; wellness; massage; relax; gym; yoga; meditation

5. Building & Facilities	building; facilities; pool; design; architecture
6. Room	room; bed; bathroom
7. Price	price; expensive; cheap
8. Personalized programs and experiences	personalized; personalize; experiences
9. Romantic	romantic; couples; honeymoon
10. Family-friendly	family; children/child; baby/babies
11. Extra activities	activities; tour
12. Eco-friendly & Sustainable	eco-friendly; sustainable/sustainability; organic; ecologic

5.3. Comparison between Wellness and Non-wellness Hotels

The referred word-count was done twice. First for the group of the four selected Six Senses hotels and then, for the selected sample of four other non-wellness hotels. The method followed to analyse these two different groups was the same: after retrieving a significant amount of TripAdvisor reviews, a word count was done using the selected words (codes) mentioned in Table 3 above. The subsequent results emerged, as shown in Table 4 below:

Table 4

Categories Valued in Six Senses versus Non-wellness Online Reviews

Categories valued in the online reviews	Number of occurrences in Six Senses reviews		Number of occurrences in Non-wellness reviews	
	N	%	N	%
Service & Ambiance	475	20,6	603	31,9
Food & Beverage	421	18,3	330	17,5
Location	362	15,7	204	10,8
Spa & Fitness & Wellness	234	10,2	90	4,8
Building & Facilities	232	10,1	178	9,4
Room	219	9,5	319	16,9
Price	94	4,1	89	4,7
Personalized programs and experiences	83	3,6	1	0,1
Romantic	83	3,6	14	0,7
Family-friendly	47	2,0	57	3,0

Extra activities	32	1,4	3	0,2
Eco-friendly & Sustainable	21	0,9	0	0,0
Total occurrences (word count)	2303		1888	

In order to find out the real gap between the two groups, there was the need to look for the difference of the proportion between the two elements in analysis (the Six Senses hotels and the non-wellness hotels), and, to reach that goal it was used a difference of proportions hypothesis test (bilateral):

$$H_0: p_1 = p_2$$

$$H_1: p_1 \neq p_2$$

Due to the sample dimension (2303 and 1888 keywords found for Six Senses hotels and for non-wellness hotels respectively) a reduced normal distribution was used. The test was done with 95% of confidence (test values below -1,96 or above 1,96 indicate that the null hypothesis must be rejected). The results are shown in Table 5 below.

Table 5

Proportions hypothesis test between Six Senses and Non-wellness hotels

Categories valued in the online reviews	Z-value	Result
Service & Ambiance	-8,336748388	Reject
Food & Beverage	0,67330857	
Location	4,630622162	Reject
Spa & Fitness & Wellness	6,504813726	Reject
Building & Facilities	0,70023471	
Room	-7,112956409	Reject
Price	-0,996724628	
Personalized programs and experiences	8,161293206	Reject
Romantic	6,131798228	Reject
Family-friendly	-2,025528299	Reject
Extra activities	4,355616925	Reject
Eco-friendly & Sustainable	4,159627841	Reject

From the test results it can be concluded that the categories “Food & Beverage”, “Building & Facilities” and “Price” cannot be considered different between the two hotel types mentioned. However, for all other categories under evaluation there is a difference on importance attributed by the clients according to each hotel type, which can be

extrapolated to the population. Therefore, it can be then considered that what customers are looking for in a Six Senses hotel is different from what they are looking for in a Non-Wellness hotel.

To better compare these results with the strategy adopted by Six Senses, the main wellness strategies adopted by Six Senses, disclosed in Image 6, were associated with the twelve categories, which are said to be the most representative in the reviews analysed from TripAdvisor (Table 4) as shown in Table 6 below.

Table 6

Association of Six Senses strategy with the Twelve Categories Valued in the Reviews

The wellness strategies adopted by Six Senses Hotels Resorts & Spa	Categories Valued
Immersive journey and self-discovery	Personalized programs and experiences
Sustainable operations and design	Eco-friendly and sustainable
Meditation and mindfulness programs	Spa, Fitness & Wellness
Fitness facilities and programs	Spa, Fitness & Wellness
Nutrition programs	Food & Beverage
Organic cuisine and farm-to-table dining	Food & Beverage
Sleep management	Personalized programs and experiences
Anti-aging programs	Personalized programs and experiences
Personalized screening	Personalized programs and experiences
Local culture and activities	Extra activities
Child wellness programs	Family-friendly
Spa services and facilities	Spa, Fitness & Wellness
Empathy and strong relationships with guests	Service & Ambiance
Provide an escape with memorable experiences	Personalized programs and experiences
Location in incredible beauty settings	Location
Holistic approach with focus on long-term benefits	Spa, Fitness & Wellness

After analysing the results obtained, it can be stressed that “Service & Ambiance” has a greater importance for the non-wellness sample when compared to Six Senses, however the opposite happens when the category is “Personalized programs and experiences”, which is much more valued in the Six Senses reviews. This result also goes in line with the strategy implemented by Six Senses that emphasise a lot the importance of providing a personalized experience for each customer.

The Six Senses brand also presents as a strategy a big care for the environment and sustainability, which is also proved by the results obtained in this test. In fact, the

category “Eco-friendly and sustainable” is significantly higher for the Six Senses sample. While, in the non-wellness sample the focus is more on the “Family-friendly” category, showing little environmental concerns.

Regarding the “Spa, Fitness & Wellness” category it was already predictable that the Six Senses customers would have a greater focus on it, when compared with the non-wellness clients. And the results reaffirm exactly this reality which is also in accordance to the strategy defined by Six Senses.

Considering the “Location” it can be observed that it is higher for Six Senses which is in line with the strategy of the brand, who believes that this is a vital element for its properties, and it extensively contributes to its uniqueness to provide guests with extraordinary surroundings such as remote islands or nearby to UNESCO sites. This can be also related to the higher result obtained for the “Romantic” category, because usually couples prefer quiet and remote locations whether it is for their honeymoon or just for a romantic getaway.

In regard to the room, it is the non-wellness customers who give more priority to this category. A possible explanation can be the fact that wellness hotels, such as Six Senses, offer a wider variety of personalized programs and experiences, which consequently make customers to stay less time in the room, not valuing it as much as the others. It can also be stated that the depreciation given to the category “Room” is also aligned with the strategy defined by Six Senses, because it is directly linked with the personalized service and the “extra activities” offered which are much appreciated and valued by the typical wellness customers.

5.4. Survey results

To better reinforce the results obtained above, it was decided to carry out a survey to analyse what people actually understand about wellness tourism and how much they care about each one of the hotels' categories already mentioned above.

The survey was answered by 85 people, and the answers' distribution across age groups and depending if the respondent has been to a wellness hotel before, are presented in Table 7 and 8 below:

Table 7

Survey Answers' Distribution Across Age Groups

AGE GROUPS	FREQUENCY	PERCENTAGE
Less than 25	5	5,9%
From 25 to 34	24	28,2%
From 35 to 44	27	31,8%
From 45 to 54	20	23,5%
From 55 to 64	8	9,4%
65 or above	1	1,2%
Total	85	100%

Table 8

Survey Answers' Distribution Depending if the Individual Has Been to a Wellness Hotel Before

HAVE BEEN TO A WELLNESS HOTEL?	FREQUENCY	PERCENTAGE
No	44	51,8%
Yes	41	48,2%
Total	85	100%

Regarding specifically a question from the survey which aims to analyse which categories (which emerged before, from the coding of TripAdvisor reviews) were the most valued when visiting a wellness hotel, in order to evaluate the importance given to each category, it was attributed the punctuation of eleven points to the one nominated for the first place, ten points to the second, consecutively until the last, evaluated with zero points. With this classification, it was possible to calculate the average given to each of the categories, and by taking into consideration if the respondent ever visited a wellness hotel before or not, the following results emerged as can be seen in Table 9 shown below:

Table 9

Importance given to the Categories Depending if the Individual Has Been to a Wellness Hotel Before

Categories under analysis	No	Yes
[Service & Ambiance]	9,30	9,17
[Room]	7,95	7,34
[Location]	7,52	7,20
[Spa & Fitness & Wellness]	7,48	7,37
[Food & Beverage]	7,45	6,80
[Price]	6,39	5,66
[Building & Facilities]	5,43	6,07
[Family friendly]	4,02	3,76
[Eco-friendly and sustainable]	3,36	4,46
[Personalized programs and experiences]	2,68	3,15
[Extra activities available]	2,61	2,61
[Romantic]	1,80	2,41

As it can be seen there are some differences between the answers given from the two distinct groups (never visited versus already visited wellness hotels before). The resulted order of preferences is not the same, as can be seen in Table 10 below:

Table 10

Order of preferences between who visited and never visited wellness hotels

Ever visited a wellness hotel before?	NO	YES
1 st	[Service & Ambiance]	[Service & Ambiance]
2 nd	[Room]	[Spa & Fitness & Wellness]
3 rd	[Location]	[Room]
4 th	[Spa & Fitness & Wellness]	[Location]
5 th	[Food & Beverage]	[Food & Beverage]
6 th	[Price]	[Building & Facilities]
7 th	[Building & Facilities]	[Price]
8 th	[Family friendly]	[Eco-friendly and sustainable]
9 th	[Eco-friendly and sustainable]	[Family friendly]
10 th	[Personalized programs and experiences]	[Personalized programs and experiences]
11 th	[Extra activities available]	[Extra activities available]
12 th	[Romantic]	[Romantic]

Even though the results obtained in the sample were distinctive for the two groups, it was necessary to analyse if this difference was significant to extrapolate to the population. Therefore, it was performed a Mann-Whitney test for each category under analysis (we use non-parametric tests because the variables are ordinals) with 95% of confidence. However, the corresponding results didn't enable to consider that there are significant differences, because the asymptotic significance (proof value) for any of the categories is equal or under 0,05, as can be seen in Table 11 below:

Table 11

Mann-Whitney Results for the difference between Who Visited and Never Visited a Wellness Hotel for all Categories

Categories	Asymptotic Significance (2-tailed)
[Service & Ambiance]	0,886
[Food & Beverage]	0,332
[Room]	0,693
[Location]	0,701

[Spa & Fitness & Wellness]	0,876
[Building & Facilities]	0,298
[Price]	0,338
[Family friendly]	0,870
[Eco-friendly and sustainable]	0,200
[Extra activities available]	0,862
[Personalized programs and experiences]	0,652
[Romantic]	0,487

Despite the differences observed in the sample, the data do not allow us to conclude that the difference is significant, so we can consider that the fact that people that have visited a wellness hotel don't have a great influence on the valuation they attribute to the different elements under analysis.

On the one hand, through the interviews it was evident that Six Senses adopts a distinct strategy to attract clients, and the corresponding TripAdvisor reviews' analysis confirm that fact, but was only made considering people who already visited a property before. On the other hand, with the survey analysis it can be shown that people who never visited a wellness hotel before usually have the same idea as the ones that already have been to one of those hotels. Therefore, it can be said that what a customer searches for in this type of wellness establishments is usually not influenced by the fact that they already have been there or not.

Additionally, it was also performed a Kruskal-Wallis test (that is a non-parametric equivalent to one-way ANOVA) that allows to compare several independent samples. This test was performed (with 95% of confidence) to compare the distribution across the age groups (five groups, taking into consideration that the group [+65] was excluded for the fact that there was just one respondent from this age group answering the survey) with the categories ranking. The results obtained indicate that the [Family-friendly] and

[Personalized Programs and Experiences] have significant differences (asymptotic significance/ proof value equal to 0,003 and 0,034 respectively, and both under 0,05), as you can see in Table 12 below:

Table 12

Kruskal-Wallis Results for the Different Categories across Age Groups

Categories	Asymptotic Significance
[Service & Ambiance]	0,216
[Food & Beverage]	0,859
[Room]	0,825
[Location]	0,749
[Spa & Fitness & Wellness]	0,478
[Building & Facilities]	0,180
[Price]	0,097
[Family friendly]	0,003
[Eco-friendly and sustainable]	0,066
[Extra activities available]	0,118
[Personalized programs and experiences]	0,034
[Romantic]	0,235

In order to find out in which age groups were these differences detected, it was performed one Mann-Whitney test for each possible combination of age groups. The results of these tests are described in Table 13 below, where the differences detected are represented in red colour, meaning that their respective proof value is equal or under 0,05.

Table 13

Mann-Whitney Results for the Family-friendly and Personalized Programs and Experiences across all combination of age groups

Age-Groups	[Family-friendly]	[Personalized Programs and Experiences]
[Less than 25, From 25 to 34]	0,005	0,139
[Less than 25, From 35 to 44]	0,002	0,160
[Less than 25, From 45 to 54]	0,006	0,526

[Less than 25, from 55 to 64]	0,007	0,878
[From 25 to 34, From 35 to 44]	0,015	0,480
[From 25 to 34, From 45 to 54]	0,36	0,004
[From 25 to 34, From 55 to 64]	0,406	0,195
[From 35 to 44, From 45 to 54]	0,145	0,022
[From 35 to 44, From 55 to 64]	0,325	0,345
[From 45 to 54, From 55 to 64]	0,853	0,429

The results show that, for the category “Family-friendly” people from the age group [Less than 25] give this category less importance than the rest of the age groups. Perhaps this outcome can be justified by the fact that they don’t have children yet. Also, individuals [From 25 to 34] still attribute to the “Family-friendly” category less importance than the ones aged from 35 to 44, possibly denoting that they don’t have any children yet. This result can be validated with the delaying of parenthood, which is observed nowadays.

Regarding the category “Personalized Programs and Experiences” the results illustrate that people [From 25 to 34] perceive this category as more important than the group [From 45 to 54]. Likewise, the respondents [From 35 to 44] give this category more importance than the ones aged [From 45 to 54]. These results could be explained by the fact that the older respondents might just want to slow down and relax in the wellness hotels and, consequently don’t give too much importance in having something personalized for themselves. On contrast, the younger generations [From 25 to 34] and [From 35 to 44] might value more the opportunity to have special programs, such as fitness and nutrition or individual coaching, tailored to their personal needs.

Moreover, with the purpose of understanding what people (who visited wellness hotels before) actually want and search for in a wellness hotel, it was then analysed what

people actually search for in this type of hotels (question five Appendix 7.5) and, also, what these hotels could do to enhance their offerings and services (question six Appendix 7.5). With that aim, a contingency table was used so that the answers to both questions could be analysed together. Therefore, the results of the two questions were matched and the answers were counted taking into consideration who answered each combination of the variables in analysis. The results obtained are shown in Table 14 below:

Table 14

Association Between What People Search and What can be Enhanced in Wellness Hotels

	5)Which one of these wellness offerings would really enhance your hotel stay?				
	4)Which one of these areas do you feel hotels could do more to enhance their wellness offering?				
	Nutrition	Spa Services	Fitness & Gymnasium	Outdoor Activities	Spiritual Wellbeing
Nutrition	4	3	1	0	1
Spa Services	2	2	0	0	1
Fitness & Gymnasium	1	1	3	0	0
Outdoor Activities	2	3	0	5	1
Spiritual Wellbeing	2	3	0	1	4

The results indicate that what people believe that should be enhanced is also corresponding to what they want and search when they engage in these wellness travels. As an example, there are five people who agreed that “Outdoor Activities” really enhance their stay and, simultaneously believe, that hotels should invest in this area if it wants to enhance its wellness offerings. One exception to this pattern is the area “Spa Services”, which is mentioned in a greater scale in question five, but with a lower scale for question six. One possible explanation could be that “Spa Services” are already quite developed in the hotels, as it is one of the most traditional wellness offerings.

Despite this precedent analysis, in regard to the question “How likely are you to book your next hotel around wellness (with 1 being the less and 10 the most likely)”, 37,6% of the respondents answered between 8 and 10 on the value scale to visit a wellness

hotel in the next vacation. This result show that there is a growing interest around this type of tourism and, even though, the concept is not yet totally defined, people seem to be willing to engage more on this type of travelling in order to maintain their wellbeing and health while travelling.

6. Conclusion and Research Limitations

After interviewing the HR & Training Manager at Six Senses corporate office and analysing the guest expectations retrieved from TripAdvisor it can be observed that Six Senses strategy is very aligned to what customers reflect in the reviews. However, it can also be noted that wellness is still a growing concern for travellers, and, therefore it is not yet seen as a primary pull factor when it comes to planning the holidays, but rather a secondary reason. Nonetheless, wellness will always be an important aspect of people's life and, in Southeast Asia, where the highlight of tourism is the location itself, wellness is not just yet at the top of the list.

Nonetheless the author believes that with the increased stress levels we face nowadays, wellness tourism, which is already a growing concern, but not yet a niche market, will become more important for the future generations, who will quickly begin to realize all the health benefits of staying at a hotel that takes care of their wellbeing. This is in line with the results of the survey, where it can be noticed from the answers given that there is a growing interest for wellness, with more than 50% of the respondents saying that they are likely to book their next hotel around wellness.

Facing this growing concern for wellness, Six Senses and other wellness hotels will need to analyse and decide how they want to position themselves: if they want spa, fitness & wellness to be the number one reason a guest comes or, alternatively, if they want them to be seen as a complementary service to enrich the travel experience itself.

Hence in the next five, ten or twenty years Six Senses and other wellness hotels should adopt the following strategies:

- Reinforce the marketing and communication in order to stand out in this wellness niche market;
- Start to connect what they offer to the respective consumers' needs and desires, creating a better chance of exciting them about all the wellness offerings and possibilities;
- Understand that education in this new segment is the key to start to engage customers and stimulate a bigger wellness consciousness;
- Recognise that loneliness is a major reason for the need of meaningful human connection. Hence, try to offer meaningful products and services to attract this type of customers;
- Be aware that nature is a leading wellness trend, hence, it is very important to capture the natural environment as a major part of the hotel's travel proposal;

In regard to the drawbacks of this research and specifically concerning the qualitative data collection, one error that can appear is if the desired interview objects are not available to respond and the interviews are conducted with people who have less knowledge on the area. Furthermore, another limitation to this study is that it only considers the perspective of some wellness organizations in some specific countries, therefore the analysis can be subject to some bias.

Additionally, as a result of the small sample size it is not prudent to take a broad view over the present results, hence they should be interpreted carefully. In order to be more coherent, it would be needed quantitative research to create profiles of wellness tourists, so that the benefits would be corresponded with demographic characteristics and specific travel behaviours. Likewise, the fact of studying Southeast Asia in particular, could also be too restrictive, because wellness tourists might seek different benefits in

other cultural contexts. Thus, cross-cultural research would be required. Nonetheless, this study has shown that qualitative research can be useful to show that there seems to be benefits exclusive to the wellness tourism context.

As wellness tourism research is still in its early stage, the concept is not yet totally structured, but it is already understood that it does not aim for quantity and for mass tourism, but rather for a niche market and well-defined target. Therefore, the supply side is still working on stimulating the demand in order to adjust to its needs, but the fact is, that there is an increasing number of new infrastructures and wellness hotels showing up in the market, which reveals the existence of a growing potential for this segment.

Overall, the study purpose aimed to be not purely academic, but also real-world applicable in order to get a deeper understanding of the tangible use of the concept of wellness tourism and also to understand how this phenomenon has been explored by important tourism participants. Therefore, the resulted knowledge intends to be a useful input for all the stakeholders and organizations involved in this tourism segment.

7. Appendix

7.1. Insights of the wellness tourism market: transcription of the interview with Jeff Romeo, a Wellness Travel Specialist and Founder/CEO of Live for Incredible Wellness Travel

1. In your perspective, what is wellness?

a. Define wellness tourism.

When we travel for wellness and health purposes: travel to disconnect, yoga, detox, fitness. Wellness tourism is for everyone, because travel can be very stressful, and a full and holistic program can be the right cure to that!

2. What different types of wellness tourism we can name? Is there a possible classification?

Wellness traveller types:

- A. The Active Traveller: Yoga/Pilates; Hiking; Biking; Climbing; Personal Training/Fitness Centre; Racing (Ironman, Triathlon. Marathon); Water Sports; Snow Sports; Tennis/Golf; Adventure/Challenge Courses; Weight Loss/Fitness Routine/Boot Camp; Crave Energy & Rejuvenation
- B. The Nutritious Traveller: Local Organic Eating (Farm to Table); Cooking/Nutrition Class; Diets: Gluten Free/Paleo/Raw/Vegan/Vegetarian; Cleanses/Juicing; Weight Loss; Culinary Tours; Wine Tastings; Wine/Beer making; Tea/Coffee
- C. The Mindful/Spiritual Traveller: Meditation & Disconnections; Relaxation & Pampering; Body Healing/Upkeep (massages, facials, manicure/pedicure, water treatments, sauna, steam room); Stress

Reducer/Management; Depression/Fear; Relationship Building; Cultural Engagement/Local Events; Creative Education (Photography, Painting, Jewellery Making...); Connection with God/Nature (Forest Bathing); Discovery (Cannabusiness); Team Building/Reconnect/Clarity/Focus (for personal or business purposes)

D. The Eco Traveller: Sustainability; Connection with Nature; Agro Tourism; Voluntourism; Disconnect/Unplugged (Digital Detox); Crave pure and raw destinations

3. What are the trends in sales over the past years?

a. In your perspective what are the main reasons behind the growth of wellness tourism?

People are realizing that their health is more important than what they thought. People realize that without health, everything goes down-hill.

Information overload world are affecting and increasing the stress levels, people are realizing that they need to step back a bit and disconnect, not only for their well-being, but also for their personal and professional growth. People are realizing that vacation should rejuvenate and not only be for indulgence purpose (otherwise after vacation, people need a vacation from a vacation). And these are the main reasons why this trend is increasing in such a big scale.

b. Do you think the trend is to increase the demand in the next years?

Why?

It's going to continue to increase for a number of more years, until it will level off. Until people realize that wellness is a mindset. Hotel program support people in this journey. But it will be always a big market and it's here to stay, because people realize it's not an option, but a necessity.

4. What regions are developing the most in the last years?

a. What are the main enablers to develop wellness tourism in Southeast Asia region? Are there any barriers?

The main enablers: When you think about Asia you think about mindfulness and spirituality and birth of yoga. The region has a story behind, a whole culture and community that enables Asia to offer a unique offer with authentic experiences where people can connect with locals. People want peace, privacy and original experiences. The main barriers for travel: Accessibility, long flights.

5. Who is the wellness consumer? (Average age? Sex? Occupation?)

There are 2 different types: Primary wellness traveller: more strict, they travel specifically for wellness purposes; Secondary wellness travellers: average person, the one that is not so strict with their health, but that want to do something to improve and incorporate new habits. These clients want a balance, not a strict detox health program. Most of them are females in their 30-50. Is very women dominant and most of the people came for big cities (so that they need to relax and disconnect). But right now the industry is expanding and there are an increasing number of males attracted to this market. So this average age/Sex/occupation is always changing, because everyone needs wellness.

6. What the main wellness customer needs?

a. What they value the most? Service quality? Infrastructure? Location? Food? Activities offered?

The most valued: Privacy; Want to feel comfortable; Different options and variety; Consultation (they figure it out what are your specific needs) and personalization.

However, there is no one size fits all in this segment, you need to speak with the people and understand their needs in order to adapt and satisfy consumers in the best way.

7. Do you think the average spending in wellness tourism is usually higher than in other type of tourism?

People pay premium for wellness. They prefer to spend more to make sure that they will have the best journey and results.

7.2. Insights of the wellness tourism market: transcription of the interview
with Katherine Droga, Chair of Wellness Tourism Institute

1. In your perspective, what is wellness?

a. Define wellness tourism.

A specific division of the global tourism industry that is defined by the common goal of creating, offering, and marketing activities primarily focused on serving the wellness traveller and those who want to be.

Wellness travel: Any trip where the primary purpose includes activities that allows the traveller to maintain, enhance or kick-start a healthy lifestyle and increase one's sense of well-being

2. What different types of wellness tourism we can name? Is there a possible classification?

According to the Global Wellness Institute they define two different types of wellness travellers. Primary wellness travellers and secondary wellness travellers. Primary wellness travellers are those travellers whose primary purpose of the trip is wellness/wellbeing. Secondary wellness travellers incorporate wellness components into

their trips but this it is not the main reason for the trip (could be business, relations/leisure etc)

3. What are the trends in sales over the past years?

According to the GWI global wellness research, the sector is growing at twice the rate of global travel expenditure.

a. In your perspective what are the main reasons behind the growth of wellness tourism?

For me it appears to be following the global lifestyle trend of valuing our health and wellbeing more. This is combined with the fact our lives have greater stress/pressure daily which leads to people seeking time out and an increased focus on wellness from time to time.

b. Do you think the trend is to increase the demand in the next years? Why?

Absolutely. The consumer is driving the demand for amazing wellness travel experiences and hoteliers, resorts, individual operators and wellness professionals are meeting this demand and increasing their offerings/experiences to the customer.

4. What regions are developing the most in the last years? What are the main enablers to develop wellness tourism in southeast Asia region? Are there any barriers?

I don't believe that any one destination is leading the wellness travel market. However, Slovenia and Ibiza are starting to do some good work in this space and many parts of Austria and Germany offers some great wellness retreats. South East Asia has always traditionally been a strong area for wellness travel experiences. The

establishment/build and running costs can often be lower in some south east Asia (not always). One of the key ingredients that the customer seeks from a wellness experience is a connection to nature and the natural environment. This doesn't mean that a wellness experience can't be offered in a busy city but when travellers are seeking a primary wellness trip, nature continues to be a major ingredient. Customer service and amazing guest experiences related to wellness will always attract positive word of mouth in this sector.

5. Who is the wellness consumer? (Average age? Sex? Occupation?)

There is no one set demographic for wellness travel. While women aged 45+ are often drawn to wellness retreat vacations, this is not the only demographic and gender profile. We also see Millennials taking a keen interest and participation in wellness experiences on a daily basis (not just for leisure/travel). Overall it is really a mindset of the traveller for wellness. Someone seeking to improve/enhance/maintain or kickstart their wellbeing from a physical, spiritual and/or mental perspective.

6. What the main wellness customer needs?

- a. What they value the most? Service quality? Infrastructure?
Location? Food? Activities offered?**

Top three needs really seem to be amazing nature, great food and a variety of wellness activities to choose from that meet their need state of the trip. (eg spa treatments or fitness-based activities)

7. Do you think the average spending in wellness tourism is usually higher than in other type of tourism?

Yes, see question above. The Global Wellness Institute do a significant piece of research on the Global wellness travel trends and this has documented the expenditure growth being higher than traditional tourism spend. This research study will be updated again with new data in October 2018.

7.3. Industry overview and trends: transcription of the interview with the HR & Training Manager at Six Senses Corporate Office

1. In your perspective, what is wellness?

At Six Senses, we define wellness as an immersive journey where people want to step into a story that is larger than themselves. It is a large part of who we are and whether that is an exterior or interior adventure, wellness is about reconnecting with yourself, others and the world around you focusing on things like culture, community, physical, emotional and mental well-being.

Furthermore, our layered approach to wellness invites our guests to do as much (or as little) as they like. This journey is about establishing the lasting benefits and really guiding our guests on a personal path to finding the right harmony while respecting their personal needs and wellness goals.

Additionally, at Six Senses we strongly believe you can't promote wellness if you do not care about the environment. Sustainability and wellness go hand in hand and we work with local communities and organizations to promote sustainable practices in all our wellness areas. Our goal here is to focus on the future generations: making sure that they have a safer environment and more resources than we have today. For example, we refuse to sell beauty products that contain microplastics.

Lastly, wellness at Six Senses isn't just about the guest. Our "hosts," (what we call our employees) are also ambassadors of wellness. At Six Senses we provide the right atmosphere to learn and develop their wellness goals while staying motivated. Thus, we also believe that wellness is connected to the occupational, intellectual and financial benefits for our hosts.

2. What are the trends in sales over the past years?

In southeast Asia there is a large trend in participating in local wellness activities. For example, experiencing a Thai massage in Thailand is popular with our guests. Many international visitors want to immerse themselves in the local culture, experiencing a service or journey that is authentic to that location. This is our signature trend as our properties are really infused into the local culture, design and history of the area.

a. What is affecting the growth of wellness tourism?

One of the largest factors affecting the growth of wellness tourism at Six Senses is the ever-growing public health awareness of people. Just walking down the streets of any major Asian city, you are bombarded by banners and posters of beauty products, young attractive models or wellness services. The media plays a large part and over the last 50 years, the perception of what it means to be "healthy" has shifted the entire spa and wellness industry. In general, we have witnessed that our guests want more and more results, in shorter periods of time. This has caused a boom in various technologies or amplifying the service menus options.

However, at Six Senses we still believe in a locally-inspired holistic approach. Our end goal is to provide quality, natural remedies that will leave long-term benefits

rather than short term impacts. This does require more time but leaves greater results when combined with a relaxing destination.

3. What are the main enablers to develop wellness tourism in southeast Asia region? Are there any barriers?

One of the main enablers we believe can develop wellness tourism in southeast Asia is food. The goal here is to provide a dining experience that not only tastes good but is good for you. From a tourism perspective, we really believe that showcasing where the food comes from is another wellness trend – telling the story of the farmer or the fishery. At Six Senses we are one step ahead here as we offer organic cuisine at our resorts and spas that's so fresh guests can pick it themselves literally from the gardens. Our *Eat With Six Senses* philosophy educates guests on how to nourish body and soul through simple cuisine that doesn't require smaller portions, counting calories or walking hungry. For more see here.

One large barrier to the wellness tourism industry is the large number of choices/options available today. Catering to every need is difficult but at the same time necessary at times as guests' expectations are high. Take for example the guest who wants to trim a few pounds during their visit. Should they try a regular fitness class, yoga, meditation, a diet plan, a wellness journey or a mix of all? With each choice you also need to take into consideration staffing, price, costs, operations and occupancy. Therefore, at Six Senses we really believe that wellness is a personalized journey of self-discovery. It is very important to listen to the guest and understand their needs before offering anything.

4. Who are your consumers? (Sex? Age? Nationality?)

We are seeing two major consumer groups coming to southeast Asia:

- 1) European markets – UK, Germany, Russia – couples, ages 30 to 55, middle to upper class incomes, well educated, leisure travellers with an emphasis on relaxation. Typical stay duration – 3 to 5 nights.
- 2) Local families – inside of the local country we get many families – 1+ children, ages 28 to 42, middle class, short stay (weekend or public holidays) with an emphasis on family activities. May bring additional family members (ex: grandparents), well-educated.

5. What type of lifestyle is relevant for your consumers?

a. What are their major needs during their stay?

At Six Senses, many of our locations are in remote, tropical climates so the emphasis falls on relaxation and simply escaping. Part of that escape includes having memorable experiences (whether alone or together) thus, one of the biggest needs are unique activities that are out of the ordinary, fun and social. As well can be captured or shared post-stay.

From the wellness side a large number of services, to support relaxation continue to fall under spa services including: massage, baths, body masks and facials. We are trying to pioneer wellness away from just spa services and incorporate sleep, nutrition, anti-aging and even child wellness activities. Secondary activities focusing on wellness are excursions including: local tours, sport lessons, sunset dolphin cruises, etc.

b. What they value the most? Infrastructures? Extra activities? Service quality? Location?

Feedback received and data collected from guests over the years, has shown greater emphasis on 1) Service Quality, 2) Employee Behaviour and 3) Privacy (a quiet location)

6. What type of habits related to consumption exists on the market?

a. What is the average length of the stay?

Average in southeast Asia is 4 to 5 nights

b. How loyal are your consumers? Are they usually one -time customers?

Overall in the company, we have a large number of guests who are loyal in the sense that they will travel to different Six Senses resorts. In southeast Asia we have a lot of repeat guests who come back annually (or twice a year) to the same resort (or country) and stay with our brand. Many of them are the #2 category mentioned above – local families. Statistically, for every 100 guests, 20 to 30 will be repeats.

7. Who are your main competitors?

Brands such as: Auberge Resorts; Banyan Tree Resorts; Belmond; Como Hotels & Resorts; Four Seasons; GHM; Jumeirah; Leading Hotels of The World; Hotels & Resorts; One & Only; Raffles; Rosewood Hotels

a. What type of marketing strategy you use to differentiate yourself from the competition?

Our focus is more towards relationship marketing and really building relationships with our guests through their experience. This is started through building awareness via word of mouth and viral marketing which aims to keep our brand in the hearts of global guests.

A big differentiator for us is sustainability. When our guests visit any one of our properties and share the story of how they joined an aerial yoga class outside, picked fresh eggs from the chicken farm, snorkelled and helped clean out coral reefs, or how the smell of fresh herbs surrounded their every step... it speaks for itself. We differentiate by having

extraordinary activities tied to the roots of the location. Have you ever experienced paragliding as a check in option. Well you can we us.

b. What type of services and products you offer? Why are their unique?

The uniqueness of Six Senses is about creating places in which to reconnect, in settings of incredible natural beauty together with exceptional guest experiences. Most of our resorts today encompass a private villa with a swimming pool, personalised healthy wellness programs, and special touch-points that are always decidedly Six Senses - authentic, personal and sustainable, in harmony with individual surroundings and host cultures.

7.4. Consumer profile and customer experience analysis: transcription of the interview with the HR & Training Manager at Six Senses Corporate Office

1. Who are your main guests? What they search for? What is the typical profile? More women than men? Which countries they mostly come from?

Our top three guest profiles for Southeast Asia are as follows:

1. Couples (Ages 27 to 38, Middle to Upper Class, Holiday travellers – more than 6 nights, Well-Educated, High Income Earners – over 80K USD a year, Celebrating Wedding/Anniversary/Honeymoon)
2. Families with Children (Ages 31 to 41, 2 Children Average, Middle-Upper Class, Weekend travellers – 4 nights average, Well-Educated, Average-Income Earners, Family Adventure Spenders)
3. Experienced travellers (Ages 41 to 55, Upper Class, Holiday travellers – more than 5 nights, Well-Educated, Grandparents, High Income Earners)

Other demographic details for Southeast Asia include:

- Top Nationalities – 1) Local Residents (Thais in Thailand, Vietnamese for resorts in Vietnam, etc.) 2) UK 3) USA 4) German 5) Chinese 6) Russian
- Gender – Even Balance of Male/Female Ratio
- Travel Motivators – climate, location, relaxation, privacy, safety, wellness, sustainability

2. Is it more common to receive individuals travelling alone, or couples, or families? Which one you focus more on your strategy?

Please see above. Our strategy is to cater towards couples or families

3. For you what is customer experience? Does it matter a lot for Six Senses? Why?

Customer experience is very unique at Six Senses. We have something called a GEM Concept (Guest Experience Maker). When you book a room/villa with Six Senses, you are assigned a GEM for your entire stay. A GEM is responsible for the guest experience and aims to provide any requests the guests may have in addition to participating in experiences, educational queries or tours. They are the key person to contact for anything.

4. What are the most important components of customer experience at Six Senses?

As Six Senses expands into new and exciting locations, creating destinations unto themselves, the enduring Six Senses vision remains as strong as ever: *To help people reconnect with themselves, others and the world around them.* Our brand has been born out of this vision, and these brand guidelines will give you the full story of our brand identity.

In today's world of increasing work hours and growing stress levels, we find it hard to gain perspective, to focus on what really matters in life, to appreciate all that is around us. It's only when experiencing something out of the ordinary that we begin to feel a change for the better. As our senses are reinvigorated, our natural intuition takes over, we feel alive, leaving us open to reconnect with the world, nature, others and ourselves.

We begin with a concise overview of our brand values, platform and vision that define us and differentiate us. We then continue with an introduction to a refreshed brand identity system that has been crafted and inspired by our culture. Finally, there is a set of comprehensive usage guidelines for our full portfolio, including hotels, resorts, spas and Evason, that will ensure accurate implementation of the identity elements in all our properties and in our advertising and marketing materials. This means that wherever you interact with the Six Senses brand, your senses will be the first to know. We invite you to be part of the next chapter in the Six Senses brand story – to take our brand to uncharted heights, to proudly open the doors to some of the world's most unique and beautiful places.

5. How can customer experience be improved? How you know if really needs improvement?

Customer experience can always be dynamically improved with the advancement of new technologies and guest requests. We strongly believe that memorable guest experiences require an emotionally intelligent approach to service that begins with empathy. To deliver this, we care for guests in an emotionally intelligent manner – one that is kind and insightful as well as efficient. Additionally, we strive to inspire guests: whether it is simply to take time out for yourself or to experience something new.

6. For the future you have any strategy to keep up with your competitors? Why as a guest, should I go to Six Senses in a 1st choice?

Why should a guest visit Six Senses? For us it's about natural beauty that stops you in your tracks. Far flung, yet accessible locations. A level of service that doesn't just do the right thing, but that does it well, and with great care so you feel the difference. A sense of community with sustainability at its heart. However, it's one thing to say these things, but we actually weave them seamlessly into the local fabric of every Six Senses destination.

Six Senses resorts are set in incredible and exquisite locations, whether a virgin territory or adjacent to an UNESCO World Heritage & Natural Cultural site. We believe we can design and build sublime experiences without diminishing the natural world. Each of our properties has a distinctive and diverse personality that makes use of the natural land topography. This award-winning approach extends to our new openings, including our urban concept that will premiere in New York in 2019.

The Six Senses Spas concept is a layered approach to wellness that unites a pioneering spirit with treatments that go beyond the ordinary. Our high-tech and high-touch approach takes you as deep as you would like to go – from core beauty that changes the way you look, to personalized wellness programs that can change your life.

Evason properties continue our philosophy to complement their natural environments and cultures. They are family friendly and also provide a strong value focus, while offering a vast array of personal guest experiences.

We strongly believe that anyone who visits a Six Senses will leave a better self – whether that be physically, mentally or emotionally. The two biggest parts of our DNA that helps us stand out are Wellness and Sustainability. From a wellness perspective, we Pioneer Wellness - delivering the most effective high tech, high touch wellness programs

and experiences in partnership with leading experts. We focus on high-tech and high-touch approaches which blend the old and the new – giving people the tools to create a better quality of life.

For Sustainability, we are committed to preserving the environment through sustainable operations. From our chicken farms with their own gym inside of our hotels, huge herb and vegetable gardens, marine life preservation programs and even food waste initiatives, we are guided by our overarching goals and values to act responsibly and sustainably in the areas of environmental design, development and operational performance in energy, water, waste, carbon, responsible purchasing and chemical management. We recognize our responsibility to preserve biodiversity and uphold our social commitment through corporate and local projects and education/outreach programs with our hosts, community, guests and stakeholders.

7. Why Six Senses focus the most in Southeast Asia? Any reason for that?

Historically, the concept of Six Senses was born in Thailand in 1995. From there it expanded first around Thailand, in the Maldives and in Vietnam. From there it continued to expand out of Southeast Asia.

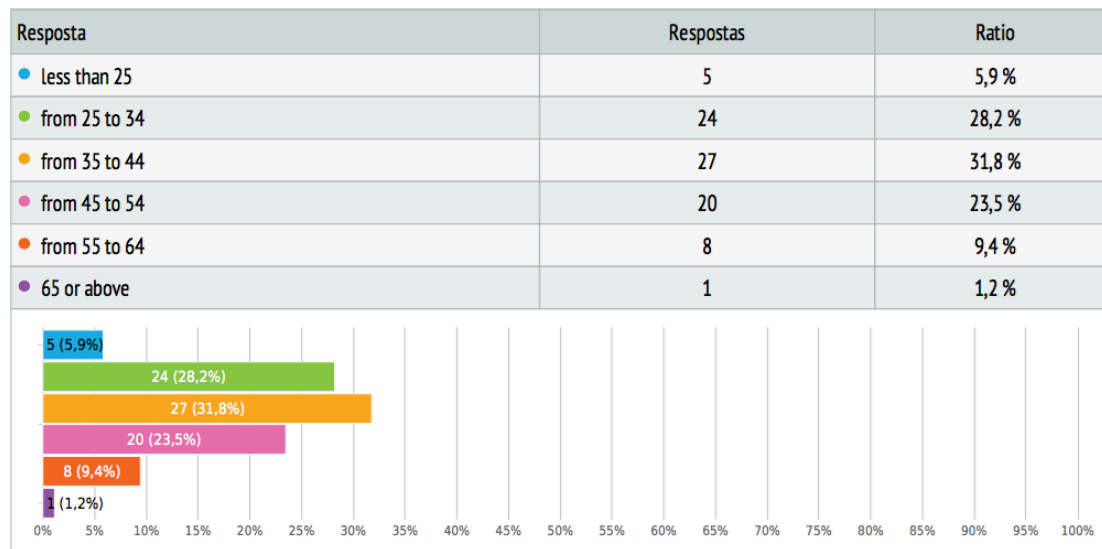
8. How you describe Six Senses philosophy using six words?

Delivering out of the ordinary experiences.

7.5. Survey

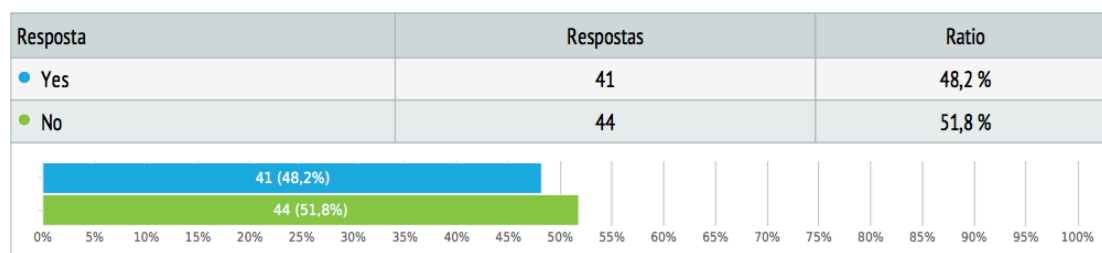
1. Age?

Seleção simples, respostas 85x, Não respondido 0x



2. Have you ever visited a wellness hotel?

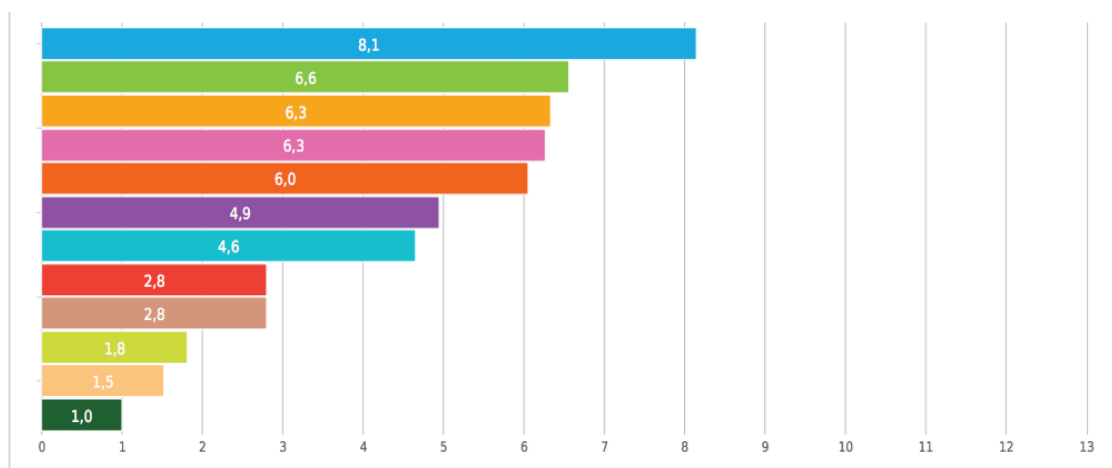
Seleção simples, respostas 85x, Não respondido 0x



3. If you have (or were to) visit a wellness hotel, what would you value the most? With 1 being the most important, rank your preferences in order below.

Ordem de preferência, respostas 85x, Não respondido 0x

Resposta	Importância
Service & Ambiance	8,1
Room	6,6
Spa & Fitness & Wellness	6,3
Location	6,3
Food & Beverage	6,0
Price	4,9
Building & Facilities	4,6
Family friendly	2,8
Eco-friendly and sustainable	2,8
Personalized programs and experiences	1,8
Extra activities available	1,5
Romantic	1

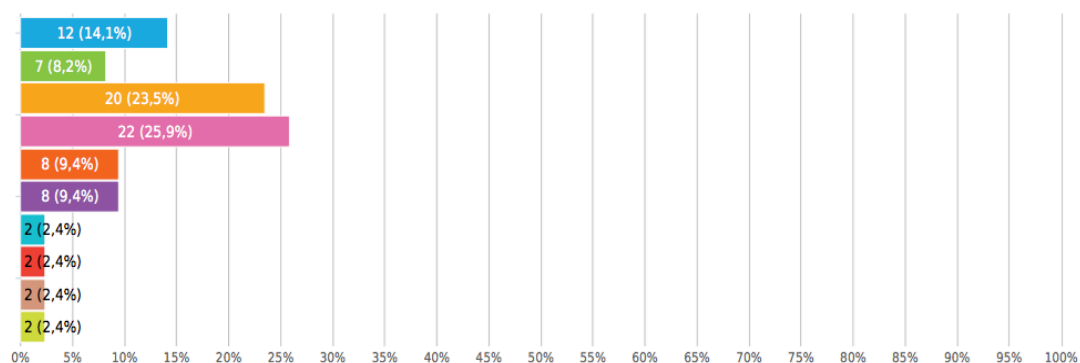


4. How important is “wellness,” during your stay at a hotel? With 1 being the less important.

Classificação de estrelas, respostas 85x, Não respondido 0x

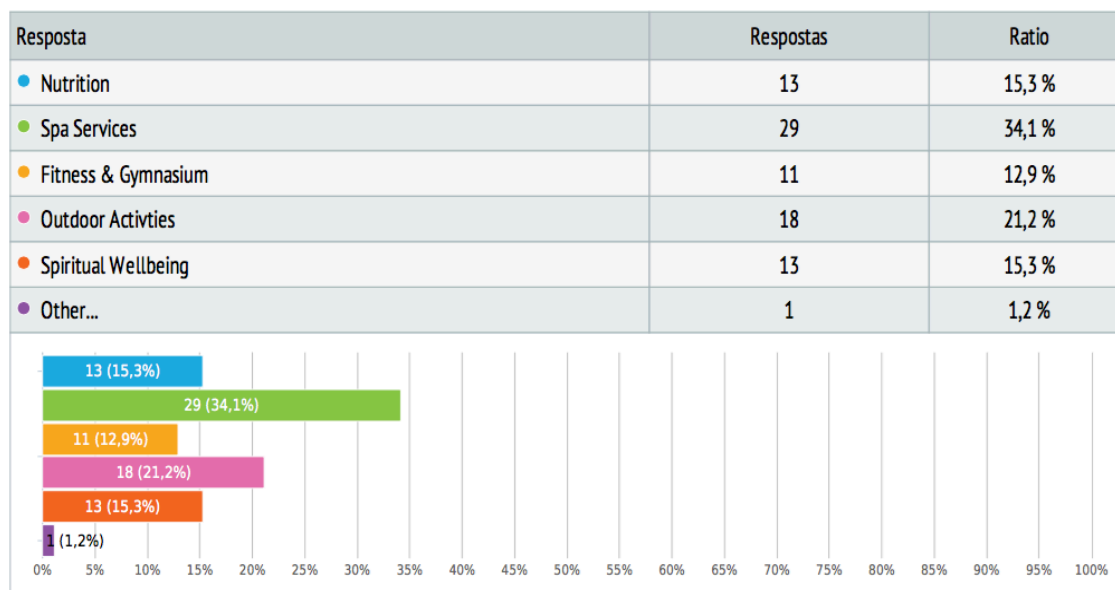
Número de estrelas 7,1/10

Resposta	Respostas	Ratio
10/10 ★★★★★★★★★★	12	14,1 %
9/10 ★★★★★★★★★★	7	8,2 %
8/10 ★★★★★★★★★★	20	23,5 %
7/10 ★★★★★★★★★★	22	25,9 %
6/10 ★★★★★★★★★★	8	9,4 %
5/10 ★★★★★★★★★★	8	9,4 %
4/10 ★★★★★★★★★★	2	2,4 %
3/10 ★★★★★★★★★★	2	2,4 %
2/10 ★★★★★★★★★★	2	2,4 %
1/10 ★★★★★★★★★★	2	2,4 %



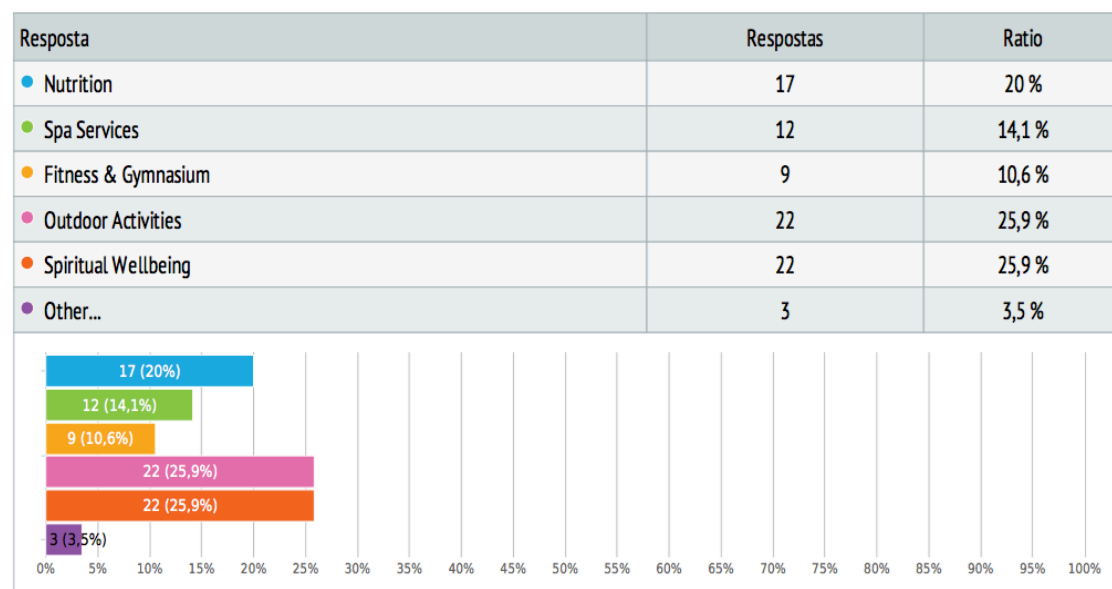
5. Which one of these wellness offerings would really enhance your hotel stay?

Seleção simples, respostas 85x, Não respondido 0x



6. Which one of these areas do you feel hotels could do more to enhance their wellness offering?

Seleção simples, respostas 85x, Não respondido 0x

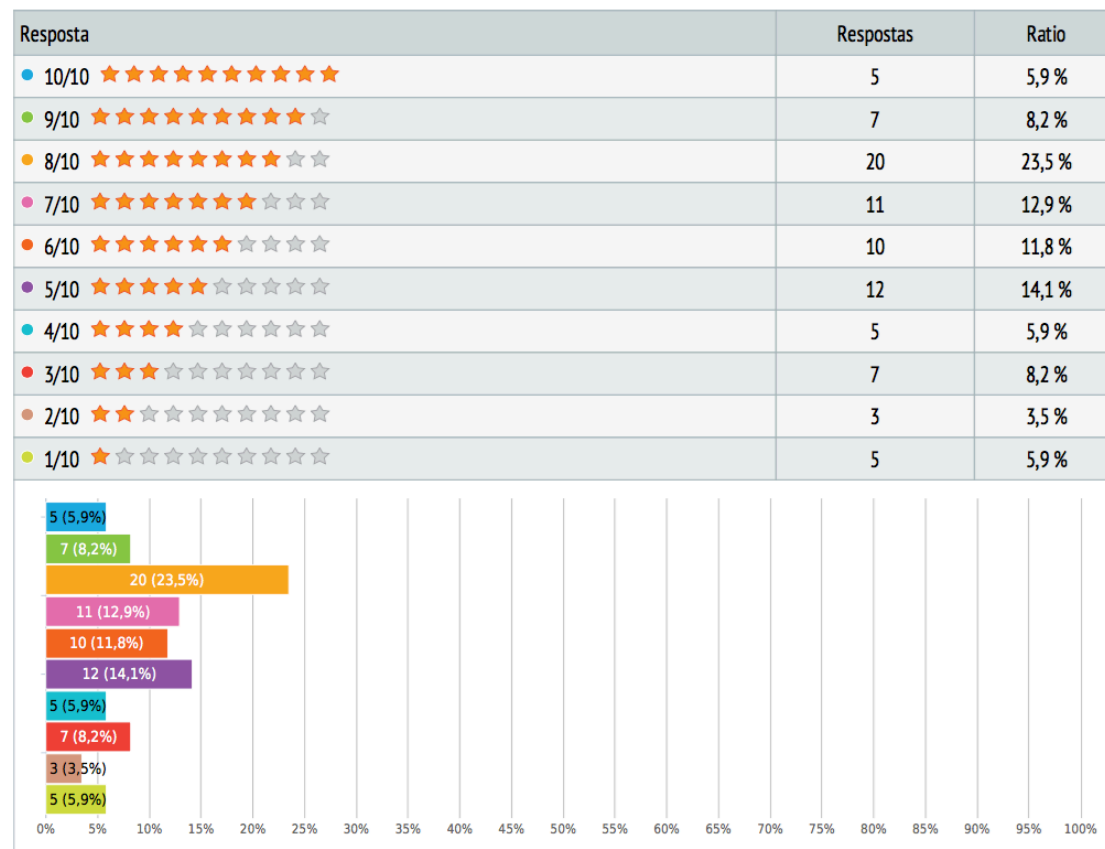


- Children Wellness
- None
- facilities, decoration, furniture

7. How likely are you to book your next hotel around wellness? With 1 being the less likely.

Classificação de estrelas, respostas 85x, Não respondido 0x

Número de estrelas 6,1/10



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