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Innovating and re-branding Nordic wellbeing tourism

- Driving forces behind the successful development of coherent wellbeing tourism in the Nordic region
- An innovation perspective on developing a particular Nordic content of wellbeing offered by tourism enterprises and destinations across the five Nordic countries



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Final report from a joint NICE research project

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Summary

The aim of this study is to draw a wider picture of what constitutes the wellbeing category of tourism in the overarching, transnational geographical context of Finland, Denmark, Iceland, Norway and Sweden. In addition, potential exploitation of special and even unique Nordic resources and advantages will be articulated in policy considerations for the emergence and support of a *Nordic Wellbeing* brand. Accordingly, the joint research will achieve a more profound understanding of the driving forces that could lead to the successful development of coherent wellbeing tourism in the Nordic region.

The project involves researchers from each of the Nordic countries assigned the task to detail the innovative and entrepreneurial aspects of selected wellbeing tourism destinations. On the whole, the *Nordic Wellbeing* project takes an innovation perspective related to developing a particular Nordic content of wellbeing to be offered by tourism enterprises and destinations across the five Nordic countries.

The purpose of the research can be summed up in the following points:

1. To address a variety of resources of importance for the development of wellbeing tourism taking into account that the resources are both material and immaterial throughout the five Nordic countries.
2. To investigate the driving forces that motivate tourism providers to develop and launch wellbeing products and that knit together collaborative structures.
3. To participate in specific development processes in so-called laboratory areas in close collaboration with local actors. The aim here is to create unique wellbeing destination propositions based on multifaceted processes, including simultaneous collaborative measures and political emphasis that go far beyond launching slogans and financing campaigns.
4. To contribute a comparative and unifying Nordic view where *Nordic wellbeing* image and brand is linked to underlying factors in the Nordic context, including policies and activities in other fields with overarching symbolic value.
5. To communicate the results to local actors, to policymakers and to the research community so as to ensure a wide application of the research results.

Methodologies

The study is organized with case investigations in the so-called “laboratory areas”, listed below, one or more in each of the Nordic countries. As the term suggests, the researchers’ aim was to initiate and draw on close collaboration with local actors. The laboratory areas served as the arenas for the systematic collection of empirical information about the wellbeing product and its suppliers. In practice, details in the research have to some extent been determined by local needs and wishes, as long as the major objectives of the project could be accommodated. The process in the laboratories included a variety of interventions:

- Participation in and contribution to workshops and seminars
- Interviews with suppliers of tourism products and services and with other actors
- Study visits to locations and enterprises offering a wellbeing product

- Contribution to surveys and other analyses
- Discussions and consultations with board members of key companies and individual key stakeholders

The regions of the laboratories are the following:

- Kainuu and Vuokatti regions, Finland
- Jyväskylä region, Finland
- Vaasa region, Finland
- The destination of Åre, Sweden
- Region Southern Denmark, Denmark
- The destination of Beitostølen, Norway
- The Mývatn Region, Iceland

Main results

The Nordic Wellbeing topic will be studied from diverse points of view and these will be highlighted by presenting different best practice cases around the Nordic countries. The main topics examined are:

1. Past pampering – wellbeing tourism market trends in a Nordic context
2. Unique selling points in Nordic wellbeing tourism? Competitive strengths and weaknesses
3. Crafting and reinventing wellbeing tourism niches
4. Policies for the development of Nordic wellbeing tourism

Conclusions and recommendations

We conclude the report by outlining and discussing the possibilities for a Nordic approach to wellbeing tourism, focusing on stakeholder collaboration in terms of marketing and innovation. Nonetheless a genuine and determined joint venture for marketing Nordic wellbeing will be a matter of a long-term strategy and expanding networks of collaboration, and this is not likely to come about swiftly. We will raise eight pillars of specific policy intents and interventions, some of which are related to product development potentials. These revolve around harvesting the benefits of unique selling points, developing new or adapted sports and leisure activities, integrating food producers, creating new markets through developing cosmetics and medicine, addressing lifestyle diseases, emphasising spirituality, enhancing infrastructure and creating international media attention.

1. Harvesting the benefits of the unique selling points
2. Developing new, adapted sports and leisure activities
3. Widening the food link
4. Signature products of medicine and cosmeceuticals
5. Addressing lifestyle diseases with wellbeing
6. Spiritualising the experience
7. Supporting the Nordic infrastructures
8. Creating an international media awareness

Foreword and acknowledgements

This research has been kindly supported by the Nordic Innovation Centre (NICe). The general purpose of funding from NICe is to stimulate innovation in conjunction with industry, authorities and research. The overall role of NICE is also to disseminate knowledge about innovation and spread the results of projects funded. NICE contributes to increasing innovation and competitiveness of Nordic industry by enhancing innovation work and collaboration across borders. The Nordic Innovation Centre is governed by the Nordic Council of Ministers.

Additional funds for co-financing have been provided from the University of Eastern Finland, the University of Southern Denmark, Hanken School of Economics, ETOUR, the Icelandic Tourism Research Centre, and BI.

The research in the laboratory areas could not have been undertaken without the serious and dedicated interest of a range of local stakeholders. Throughout there has been a sustained interest in our research based contributions. The stakeholders assisted overwhelmingly with information and inputs that have been crucial in the documentation and analysis. We are grateful for this support and attention.

Nordic Wellbeing has also raised interest among students. Arvid Flagestad's master's student, Marianne Nasralla, was involved and her contributions contributed significantly to the Norwegian case study. The University of Eastern Finland involved students in Vuokatti, Jyväskylä and Vaasa regions. Two students from the University of Eastern Finland's Department of Business are currently writing their master's theses in relation to the project activities in Vuokatti and Jyväskylä regions. The work of Tommi Nissinen is related to customer involvement in new wellbeing tourism product development and the study by Jonna Kauppinen focuses on examining the tourist experience in wellbeing holidays. In addition, Esa Naukkarinen of the Jyväskylä University of Applied Sciences (JAMK) and Erika Airaksinen of Vaasa University of Applied Sciences (VAMK), are writing theses connected to the project activities in these areas.

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1. Introduction

1.1. Health, wellness and wellbeing in a tourism context

Health, wellness and wellbeing are concepts that in recent time have attracted the interest of tourism scholars. This increased focus reflects not only the economic affluence of modern times, but also changes in values and lifestyles. Terms such as quality of life, self-fulfilment, and experiences coincide with an increased interest in beauty and health treatments, illness prevention, down-aging and self-improvement. The aging population tends to be more active, healthier and to live longer. An increased desire for faster medical care is a further explanation for the focus on health services that are offered for sale on a commercial market. More consumers are travelling for the purpose of improving their general wellness and health, and the health and wellness tourism segment is in an early phase of growth with a considerable future potential. These are people willing and able to be proactive in respect to general physical and mental wellbeing, sometimes even exaggeratedly so (Korthals, 2004). An inversely related factor influencing the interest in health, wellness and wellbeing entails the downside of modern affluence. Lifestyle related health problems such as stress induced diseases and the dramatic and disquieting increase in obesity, allergies, diabetes, cardiovascular deceases have been named “affluenza” by de Graff, Wann & Naylor (2002). They see them reflected in the modern lifestyle symptoms of anxiety, overwork, excessive alcohol consumption and use of mood altering drugs.

Health and wellbeing is not only a well-justified concern for governmental bodies at local, national and supra-national levels, but is also considered an encouraging opportunity for a wide range of non-governmental institutions and private enterprises. Health and wellbeing from this perspective are also big business, and demographic forecasts give hope for those whose main interests are economic ones (Kleinke, 1998; World Health Organization, 2006). Tourism is one of the many business sectors that see health, wellbeing and wellness as future important growth areas (García-Altés, 2005; Nahrstedt, 2004; Messerli & Oyama, 2004). Worldwide there is an emphasis on attending to new customer needs and reinventing and developing the products and services for growth and competitiveness. As demonstrated by Smith and Puczko (2009) and by Bushell & Sheldon (2009), the tourism wellbeing and wellness industry ranges from core medical treatments, through rest and recuperation to enhancement of the mind and self. The scale and scope is continuously widening.

The interest in health, wellness and wellbeing does not lie solely with the businesses that provide services and products. Increasingly, bodies that are responsible for specific destination development and marketing in tourism have focused on health and wellness (Canada Tourism Commission, 2006; Cornell, 2006; Sheldon & Park, 2009). In the Nordic countries attention is turning towards the potentials of new tourism niches, and health, wellbeing and wellness are among the areas of interest. However, the Nordic countries are definitely not alone in the move towards harvesting the potentials in this particular niche (Lindahl, 2005, 2010; Hall, 2008; Müller & Jansson, 2007). In order to achieve success in the health, wellness and wellbeing tourism sector and to strengthen competitiveness for the future, reproduction and imitation of what is found elsewhere is simply not enough. There is a need for innovative new products, services and concepts and new modes of collaboration for the utilisation of resources, not least in terms of marketing and branding.

1.2. Defining wellbeing tourism

Wellbeing – the term chosen for this research - is seen as an umbrella term which incorporates a range of aspects. We define wellbeing as follows:

Wellbeing is a multidimensional state of being describing the existence of positive health of body, mind and soul. Wellbeing is an individual issue, but is manifest only in congruence with the wellbeing of the surrounding environment and community.

Nordic Wellbeing, as indicated, is geographically bounded. *Nordic Wellbeing* is also seen from an economic and development position based on a concise understanding of costumers' needs and preferences. It must be conceptualised in terms of concrete products, which can be marketed on the home market, but also in competitive markets mainly within the EU. Therefore *Nordic Wellbeing* needs to be differentiated from other wellbeing concepts through product attributes and through marketing and branding. The substance of branding can be found in images, and the images of *Nordic Wellbeing* are typically oriented towards nature, outdoor experience and enjoyment combined with healthy local gastronomy, local culture and cleanliness of air, nature and water. The research reported here focuses on the most crucial and critical issues that Nordic wellbeing tourism faces in terms of innovating and re-branding.

In the literature, the terms health, wellbeing and wellness tourism occur. The meaning of the first term is generally accepted based on the definition of the World Health Organization (WHO) (2006). The latter two are used somewhat interchangeably with no clear and agreed definition on a distinction between them. In the Finnish language there is only one word (*hyvinvointi*) that covers both wellness and wellbeing. In a popular understanding and in most of the research literature health and wellness tourism is connected with spa experiences. In the German literature the term 'wellness' is used concictantly in line with the conceptualization by Dunn (1961) and Müller & Lanz Kaufmann (2001). Dunn is considered by some to as the inventor of the term 'wellness' by combining 'wellbeing' and 'fitness'. But as Miller (2005, 84-85) argues "the common notion in the German-speaking world that the word was a *Kunstwort* or invented term formed from the words well-being and fitness (see, for example, Knapp 2001: 32) is simply a misperception". Smith & Puczkó (2009) strongly support the application of 'wellness'. Steinhäuser & Theiner (2004), Krczal & Weiermair (2006), Nahrstedt (2008) & Wiesner (2007) use wellness to refer to a branch of health tourism and not wellbeing. Besides preventing illness and sustaining physical and mental wellbeing, the goal of health, wellness and wellbeing tourism is in many cases also to experience pleasure, indulgence and luxury. Contributing to the confusion of the definition is the fact that health-care and medical tourists may use the same recreational services as wellbeing tourists. (Konu, 2010a; Konu, Tuohino & Komppula, 2010; Müller & Lanz Kaufmann, 2001).

It may be suggested that 'wellness' is an appropriate term covering concrete product and service offerings, whereas 'wellbeing' constitutes a state of mind. Some literature proceeds towards the understanding of the theme as a fairly open product and service package which meets tourist's expectations when the aim is to achieve a holistic state of wellbeing (Krczal & Weiermair, 2006; Steinhäuser & Theiner, 2004; Wiesner, 2007).

Wellbeing tourism, as approached in the explorative research below, essentially needs to be broad and holistic as suggested in the definition above. This is necessary in order to accommodate the findings and propose policies in the Nordic tourism arena. In this case holistic wellbeing clearly encompasses the wellbeing of body, mind and soul (Smyth, 2005; Sylge, 2009).

1.3. Purposes of the study

The aim of this study is to draw a wider picture of what constitutes the wellbeing category of tourism in the overarching, transnational geographical context of Finland, Denmark, Iceland, Norway and Sweden. In addition, potential exploitation of special and even unique Nordic resources and advantages will be articulated in policy considerations for the emergence and support of a *Nordic Wellbeing* brand. Accordingly, the joint research will achieve a more profound understanding of the driving forces that could lead to the successful development of coherent wellbeing tourism in the Nordic region.

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5. To communicate the results to local actors, to policymakers and to the research community so as to ensure a wide application of the research results.

1.4. Methodologies

The project involves researchers from each of the Nordic countries assigned the task to detail the innovative and entrepreneurial aspects of selected wellbeing tourism destinations. On the whole, the *Nordic Wellbeing* project takes an innovation perspective related to developing a particular Nordic content of wellbeing to be offered by tourism enterprises and destinations across the five Nordic countries.

Laboratory area studies

The study is organized with case investigations in the so-called “laboratory areas”, listed below, one in each of the Nordic countries. As the term suggests, the researchers’ aim was to initiate and draw on close collaboration with local actors. The laboratory areas served as the arenas for the systematic collection of empirical information about the wellbeing product and its suppliers. In practice, details in the research have to some extent been determined by local needs and wishes, as long as the

major objectives of the project could be accommodated. The process in the laboratories included a variety of interventions:

- Participation in and contribution to workshops and seminars
- Interviews with suppliers of tourism products and services and with other actors
- Study visits to locations and enterprises offering a wellbeing product
- Contribution to surveys and other analyses
- Discussions and consultations with board members and key stakeholders

The regions of the laboratories are the following:

In Finland:

- Kainuu and Vuokatti regions
- Jyväskylä region
- Vaasa region

In Sweden:

- The destination of Åre

In Denmark:

- Region Southern Denmark

In Norway:

- The destination of Beitostølen

In Iceland:

- The Mývatn Region

This report includes information from all the laboratory areas, included as short case studies throughout the text facilitating a comparative analysis. Additional country reports deal in detail with each of the regions individually.

Interviews

During the project a total of 110 stakeholder interviews were undertaken (24 in Denmark, 26 in Finland, 20 in Iceland, 25 in Norway, and 15 in Sweden). Interviewees were chosen in different ways: to some extent they were identified from documents researched related to each laboratory area, through snow-balling from the first interviewees, or following the suggestions of regional developers of the area. The interviews were semi-structured with key stakeholders, such as entrepreneurs and business people, public servants, DMO representatives, NGO representatives, etc, all in one way or the other involved in the development of the laboratory area. The framework for the semi-structured interviews was made jointly by all researchers participating in the Nordic project. The focus of the questions was on the respondents' background and previous experience and contribution in terms of wellbeing products and services. Tentative questions were raised about what they considered to be the unique selling points of their area and of the Nordic countries more generally. In addition they were asked about the networks and destination management, how they gathered their knowledge and what drove their innovation. These points were then tied to an outline of Nordic lived values and a Maslowian framework of the hierarchy of needs for both individuals and the companies under study.

The team undertook study visits to the laboratory areas, and the interviews were closely connected to the specific environments and the potentials for the future there. Thus, the interviews were also semi-structured in the sense that specific issues could be raised during the visit. Throughout the

study, the local actors were extremely willing to share their points of view, and to volunteer information during follow-up interviews and during workshops.

The interviews were systematised by the researchers in the form of research notes and/or recordings. Each interview was subsequently analysed through identifying themes and a typology based on the interview framework with direct quotations added below was set up. In some instances, information on specific topics was transformed immediately into case outlines for use in research articles and for presentations on the innovation platform www.INNOTOUR.com. Accordingly, while the research has adopted a global approach, there has been room for flexibility in the specific research in order to accommodate obvious differences in the composition of the laboratory areas and the variation in the relationships between the researchers and the local stakeholders. Generally, the researchers aimed at building mutuality with local actors and to exchange knowledge on an equal and trustful basis.

Delphi survey

During the research a Delphi survey was undertaken involving key stakeholders in wellbeing tourism from all the Nordic countries. The aim was to get a wider perspective than that of local stakeholder, thus involving experts from other countries. The Delphi survey method was first developed in 1948, later to be deployed for development by the Rand Corporation in a period from 1950-1963 (Helmer, 1966). The method is named after the Greek oracle at Delphi and entails interactive and systematic forecasting relying on a panel of experts and their opinions. In the words of Gupta & Clarke (1996, 185) the method is “a qualitative, long-range forecasting technique, that elicits, refines, and draws upon the collective opinion and expertise of a panel of experts.” The method is thus designed to elicit future visions of those most actively involved in whatever topic is to be researched. The future orientation of the method also makes it a valuable tool for planning and group decision making. In the Nordic project, the aim was solely to elicit future visions and the best practices for *Nordic Wellbeing* product development. Thus the experts responded to a set of questions in two rounds. After the first round, the group of researchers in the Nordic project summarised the experts’ forecasts and the reasons behind their judgments. This summary was used to build statements for the experts to review in the second round. Thus, experts were encouraged to revise their earlier answers in light of the replies of other experts on the panel. This is in line with the Delphi survey method, as Gupta & Clarke (1996, 186) state, drawing on Gutierrez (1989): “Delphi’s goal is not to elicit a single answer or to arrive at a consensus, but simply to obtain as many high-quality responses and opinions as possible on a given issue(s) from a panel of experts to enhance decision making”.

The Delphi survey of the Nordic project was electronic, using the e-Delphi software, administrated by the University of Eastern Finland (see e.g. Chou, 2002). Experts for the study were selected by the snowball method. Every project partner from the Nordic countries made a list including 10 to 15 names that they felt were the best experts in the field. The experts were divided into four categories: research, business, developers and marketing. Altogether 65 experts were chosen for the panel. The number of respondents in both Delphi rounds is presented in Table 1. Much like in a similar survey executed in Taiwan (see: Lee & King, 2008) the panel of experts to emerge represented three distinct interests, one from the tourism supply side or industry actors, another from the public sector, and academia.

Table 1: Respondents of the on-line Delphi survey

Tourism sector	1st Round	2nd Round
Developers	3	2
Marketers	6	3
Researchers	5	2
Business	5	3
<i>Total</i>	<i>19</i>	<i>10</i>

Development of the Delphi statements started in the beginning of December 2010. The process with the experts was initiated in February 2010 and lasted until late May 2010.

Surveys

In addition to the above customer surveys were undertaken in the Mývatn region of Iceland, and in Vuokatti, Jyväskylä and Vaasa regions in Finland, along with a survey done at the Finnish Travel Fair 2010 in Helsinki. This was a four page survey with 17 questions including basic variables. The focus of the survey was on customer experience of the wellbeing services provided in the region and also customers' experience of the region as such, i.e. nature and surroundings. The aim of the survey was to get customer feedback on the destination as a place of wellbeing, what customers appreciate/want to do when they are on holiday in any of the areas and their interest and involvement in product development. The survey was performed in collaboration with the laboratory areas.

Iceland: The survey was organised in the summer of 2010 and was distributed to three places in the Mývatn region. These were the local tourist information and warden's centre, the Dimmuborgir souvenir shop and restaurant, and the Mývatn Nature Baths. In all these three locations staff was given guidelines as to how to administer the survey and promote it. The first round of visits to distribute the survey was in June 2010 and thereafter a fortnightly visit was paid to each location to collect completed surveys and provide more if needed. This continued until late August 2010.

Finland: In Finland the customer survey was implemented in three different laboratory areas. In Vuokatti region data were collected during spring and summer 2010, in Jyväskylä during summer 2010 and in Vaasa during autumn 2010. In each area data were collected in different tourist destinations, attractions and businesses.

In Denmark, the DMO VisitVejle initiated an Internet based customer survey on its own initiative, with very similar aims and questions. The results have kindly been made available for further examination in this study.

Literature reviews

As noted by Bushell & Sheldon (2009), health, wellness and wellbeing tourism has received relatively little scholarly attention, and the issue is commonly seen through the lens of spa traditions. The scarcity of research is even more prevalent in the Nordic countries, although the research interest has increased considerably in recent years. Tuohino & Kangas (2009) presented some characteristics of wellness tourism in Finland in Smith & Puczko's (2009) comprehensive book on global health and wellness. Accordingly, the trade and travel literature is the major source of information, and the

research has had to break new ground in the Nordic context. This research is basically explorative, and it draws on many sources of knowledge and experience.

The study group undertook a literature review, partly of the academic literature, and partly of the trade literature. These reviews are summarised in various publications resulting from the project and listed in Annex 1. Observations and conclusions from the literature are also reflected throughout this report.

Consolidation of results and conclusions

The members of the research group worked individually in the various laboratory areas, but the joint process ensured the maintaining of the Nordic focus and an exchange of information and experience. Bilaterally the researchers were responsible for contributions to conferences and research journals as listed in Annex 1.

This final report has been through the hands of all participants in the group, and it has been the subject of intensive discussions at meetings. Before the project work was initiated the group met in Iceland in April 2009 to discuss the project plan and its different steps. During the project period the team of Nordic researchers had four project meetings. First during the 18th Nordic Symposium on Tourism and Hospitality Research held in Esbjerg, Denmark 22-25 October 2009. In the first meeting research activities for the second year of the project were developed. The second meeting was held in Skype on April 2010. The third meeting was at the beginning of September 2010 in Budapest at the 2010 conference of the European Chapter of the Travel and Tourism Research Association (TTRA). The theme of the conference was: "Health, Wellness and Tourism – healthy tourists, healthy business". Preliminary findings were presented at this conference, garnering feedback and preparing for an interactive workshop held in each laboratory area at the end of the project in December 2010. In relation to the Budapest conference and following it the Finnish partner in collaboration with FinPro (an association founded by Finnish companies aiming to guarantee that Finnish companies, especially small and medium size companies, have access to high quality, comprehensive internationalization services) had planned an ambitious four-day benchmarking trip through spa and wellness destinations in the Alps, focusing on Austria. Unfortunately, this trip was cancelled due to the volcanic ash cloud in April 2010, and a later trip offer received no participants. The fourth meeting of the research group was at the 19th Nordic Symposium on Tourism and Hospitality Research held in Akureyri, Iceland 22-25 September 2010. As this meeting was very soon after the Budapest conference, only minor issues were added. Plans for dissemination and a further refinement of the laboratory workshops were discussed. The final conference of the project was held in Savonlinna, Finland on 14 December 2010 and broadcast via webcams to the other Nordic Countries.

1.5. Outputs of the project

This report includes the main findings in the *Nordic Wellbeing* project. It focuses on the comprehensive Nordic perspectives and prospects for this particular tourism niche.

The whole project had the objective not only of contributing to the general knowledge on wellbeing tourism, but also more specifically to assisting in local development processes. Accordingly, there is a range of supplementary outputs:

- Country and regional reports
- Contributions to websites and trade publications in the laboratory areas
- Presentations at academic conferences

- Contributions to academic journals
- Uploads of cases and best practice on trade and academic tourism websites, particularly www.INNOTOUR.com

A list of all contributions can be found in Annex 1.

2. Past pampering – wellbeing tourism market trends in a Nordic context

2.1. Introduction

As mentioned above, wellbeing is often intuitively understood as spa related experiences. Water based relaxation facilities and treatments are becoming commonplace in most destinations worldwide, being almost a standard ingredient in all hotels with more than three stars (Cohen & Bodeker, 2008; Nahrstedt, 2004). Thus, wellness in its traditional formats is undergoing rapid trivialization. A crucial issue in this project is to assist the Nordic area to promote the development of new advanced and economically feasible niche tourism products, and to improve the positioning and branding of the overall region. This requires innovative attention by the many tourism providers and other stakeholders. But it also necessitates a better understanding of key developments in tourists' motivations, needs and preferences now and in the future.

In this section the way in which trends are moving from the simple forms of pampering to more complex demands is explained. It is a challenge for both individual enterprises and destinations to understand and accommodate the new wellbeing customer. The assumption is that the Nordic countries have significant opportunities in the new demand structures of health and wellbeing. Below the key elements of the consumer trends are explicated, and how actors in the Nordic laboratory areas appraise the demand. In later chapters the business outlooks and marketing implications are elaborated on.

2.2. Holistic wellbeing and its manifestations

In the simplest formulation health and wellbeing entails the absence of illness. Travis & Ryan (1988) set out the relationship between illness and wellness as a continuum. Out of one's personal condition and preconceptions, an overall subjective assessment of wellbeing emerges. Essentially, the dimensions of wellbeing do not only relate to a subjectively measured physical and emotional state, but to determining social, material, and activity dimensions. Thus the life situation of an individual is a matter of individual mindsets and actions, but within the community and societal frameworks (World Health Organization, 2006). The tourism destinations and businesses address the "voluntary" activities, and can only marginally influence the more general wellbeing elements.

Hence, Müller & Lanz Kaufmann (2001) see the core of the wellbeing demand as "self responsibility". This is personal commitment to the improvement of health and wellbeing that drives the demand for tourism offers of certain categories. According to Müller & Lanz Kaufmann (2001), this responsibility for self is concerned with:

- The body: physical fitness, beauty and care
- Relaxation: rest and meditation
- Health: nutrition and diet
- Mind: mental activity and education.

The tourism products and destinations for health and wellness are set out in Table 2 including a systematization of the forms of traditional health and wellness services.

Table 2: Health and wellness tourism service offerings

Domain of Health and Wellness	Typical facilities
Physical healing	Medical spas
Beauty treatments	Cosmetic clinics / beauty salons
Relaxation/Rest	Pampering spas
Leisure/Entertainment	Spa resorts with 'fun waters'
Life/Work Balance	Holistic centres
Psychological	Holistic centres
Spiritual	Meditation retreats

Source: Adapted from Smith & Puczkó, 2009, 84-85.

Taking care of oneself is, in this sense, considered as the necessary responsibility of each individual, pursuing success in his/her career and private life. Modern lifestyles are claimed to put ever increasing pressures on the individual to compete, perform and achieve, and holidays will be the time-out to indulge in activities that recharge the batteries and stimulate the senses on several dimensions (Andereck & Jurowski, 2006; Mak, Wong & Chang, 2009). Researchers and practitioners refer to this as holistic wellbeing (Smith & Puczkó, 2009). However, as illustrated below, there is a "conservative" element, where customers retain a traditional understanding of wellbeing:

Case – product attributes required for successful wellbeing experiences. According to a customer survey conducted at the Finnish Travel Fair 2010 in Helsinki, potential tourists are predominantly expecting relaxation and comfort (e.g. swimming in natural waters, sauna experience, bathing in a hot water barrel) from their wellbeing tourism product. The second most important element in the wellbeing tourism offer is healthy food and the third comprises health promoting and enhancing services (e.g. Nordic Walking on lake shores or in the forest, traditional treatments and preventive care). The results support the fact that taking care of oneself and relaxation are activities that are valued highest during their wellbeing holiday.

Case – who are the customers? An extensive study of 3,000 Danish potential wellbeing guests emphasizes that the notion of holism is catching on. Many respondents clearly expect that the wellbeing facilities are concept consistent, for example, no junk food is sold on the premises. For most customers, the visit to a wellness facility or spa opens up for relaxation in many formats. Accordingly, for quite a large segment, wider wellbeing conceptions are not attractive. This illustrates the dilemmas of balancing the supply in order accommodate many user segments. The Danish study carved out four segments: 1) "Rest-WELL": a traditional, price sensitive pampering segment. 2) "Be-WELL": a segment that focuses on recovering from illness. 3) "Stay-WELL": a segment with focus on preventive measure and long-term health. 4) "Feel-WELL": a luxury segment with life balance and mindfulness on the agenda.

Case – local resources opening up for tourists. The resources for erecting a bathing facility were already in place around Lake Mývatn in the north east of Iceland and had been traditionally used by the locals. The stakeholders make no claim for providing health and wellness although the spa facility taps into the jargon of the industry promoting wellbeing through water, rest and relaxation and a reconnection to nature. Through interviews with stakeholders it became apparent how the service offering catered to the basic needs of tourists already in the region and was in need of additional recreation and services apart from rather passive nature-based recreation focused on hiking and nature observation.

Case – one attraction is not enough. Even though the destination of Åre is famous today as a world-class ski resort with an extensive slope system, customer surveys showed that many visitors were missing supplementary activities. More relaxing activities such as a bath facility and spas, family entertainment such as bowling and water-amusements as well as shopping were emphasized, but also more cultural elements. The establishment of Holiday Club in the fall of 2004 was the starting point for the new campaign of the snow-free season in Åre. The number of guests in the shoulder seasons increased from 61,000 overnight stays in 2004/2005 to 111,000 in 2008, an increase of 82 percent. The investments proved to be very successful and positive for the development of the winter season, making the resort more diverse in its offering. The Åre experience emphasizes the prospects of combining physical activities (snow related or hiking) with the relaxation offered, for example, in spa facilities.

Case – a day off. Monitoring the behaviour of tourists in the laboratory area of Vaasa reveals a complex structure of integrated needs, motives and activities. Tourists to Ostrobothnia and Vaasa do not separate wellbeing tourism from activity based tourism such as “fishing tourism” or contextual defined tourism forms such as “bed and breakfast” or “rural tourism”. Wellbeing tourism is identified by the respondents as a day off, a break from the normal, which does also include other tourist behaviour. A few hours alone, fishing, or with the family hiking is considered wellbeing in a medley of other tourism dimensions and activities.

Smith & Puczkó (2009) find that the demand for wellbeing tourism products ranges increasingly across the categories of body, relaxation, health and mind. Holistic approaches tend to expand the notion of spa experiences by placing greater emphasis on treatments that refresh, upgrade or beautify the body and provide a mental lift. However, the customers are “objects” in the hands of the providers, and “subjects” only to the extent that they feel an important in their wellbeing. Psychological side effects may include an improved body image, regained energy and appearance, with related higher self-esteem (Erfurt-Cooper & Cooper, 2009; Konu & Laukkanen, 2010). In this context a wellbeing experience will probably give a satisfactory boost to restart daily life, and facilitate enjoyment in its own right.

There are discernible emerging tendencies of a wider customer appeal in the Nordic context. A more holistic emphasis is underlined by the following examples:

Case – therapies as add-ons. The survey in the Danish laboratory area demonstrates that there is a demand for basic pampering services or self pampering in traditional spa environments, but that a variety of therapies and healthy eating opportunities add to the experiences. The Danish study also illustrates that among potential customers, awareness of the concepts of holistic wellbeing are somewhat lacking, and the offers are likewise seldom well communicated.

Case – the passive tourists. The Icelandic case study reveals that the wellbeing concept places the customers in a fairly passive role. Mývatn in north east Iceland tried to offer customers detox treatments, massage and yoga in order to complement the basic bathing facility, but these remain auxiliary in nature and are arbitrarily promoted. What the wellbeing customers seek is not explicit and has been only vaguely established as having to do with experiencing nature and soaking in hot water, following nature exploration.

Case – exercise and events as a facilitator. The Swedish study goes a step further by addressing the potentials of wellbeing in connection with physical exercise in the destination of Åre. From being an up-market winter destination well-known for its skiing, Åre has expanded its seasons by developing other physical activities, such as a well-organized bike park, summer hiking trails and theme weeks and events where visitors for instance can learn about local food, culture and flora. Many of the events are closely related to wellbeing, such as Workout Åre,

Haglöfs Åre Extreme Challenge, Åre Bike Festival, Tour of Jamtland and Maxi Avalanche. Together with numerous new spa centres and the big bathing facility at Holiday Club, the destination is today able to cater to much wider needs and preferences.

Case – rehabilitation as a facilitator. Likewise, the Norwegian case widens the idea of holism into the more medical categories of wellbeing. Beitostølen is by tradition a winter resort but more actively also catering for guests in the summer. In addition, in recent years great efforts have been put into developing the shoulder seasons in order to utilize capacity and to maintain a stable and highly qualified workforce. The visionary owners thus introduced the idea of turning Beitostølen into “a wellbeing destination”. A comprehensive competence in rehabilitation and a number of health related sports events and activities supported the resources and brand necessary to create a wellbeing destination. An Olympic swimming pool in one of the hotels connected to a traditional wellness treatment facility gave further energy to the idea of “a wellbeing destination”. In addition, being surrounded by Valdres Health Cluster (12 mainly SMEs providing various kind of health services and treatments) a broad range of competencies could be mobilized. Although there is still some distance to go in terms of a comprehensive concept, there are interesting results in wellbeing production, which lead beyond traditional pampering. For example, special programmes have been developed for particular groups of asthmatic patients. The wellbeing concept also contributes to the fact that the destination can be considered a year round operated destination, and there is a growing demand for the offering.

There are untapped opportunities in holistic wellbeing offers, and demand prospects seem to be quite favourable (Kelly & Smith, 2009). The ideas of comprehensive, holistic wellbeing cannot (yet) be considered to have been achieved in the development of Nordic tourism products. The studies suggest that the Nordic countries have more to offer to modern tourists. Below we shall ascertain how wellbeing trends proceed to develop beyond predominantly egocentric pampering traditional wellness (Liburd & Derkzen, 2009).

2.3. The social aspects of wellbeing

Wellbeing is in the eye of the beholder: what constitutes wellbeing for one person is not necessarily regarded as wellbeing in a similar way for others. Furthermore, the personal assessment of wellbeing may fluctuate over time and lifecycles in complex ways (Travis & Ryan, 1988). Hall & Brown (2006) cover e.g. a range of subjects on health, safety and ethical issues.

Tourism experiences are often considered particularly enjoyable together with others: family, relatives, friends or people from the host community. Harrison (2003), for example, focuses on the social relationships, while Neal, Sirgy & Uysal (2004) address tourism experiences by comparing the satisfaction with tourism services and the overall subjective satisfaction with life. The presence of other tourists is important for the overall experience and satisfaction. For many travellers enhancing old relationships and making new connections during a vacation are tacitly or explicitly indispensable for an experience. There is also on a more general level solid evidence for a linkage between social relationships and quality of life (Iwasaki, 2006).

The relationship with the staff plays an important role in many wellness facilities, and the literature describes the personal touch of the cult-professional masseur, or the competences of life coaches or instructors (Smith & Puczkò, 2009).

Case – creating social relations with therapists. There are examples in the Danish case study where the personality of the providers plays a major role in marketing of the offers. For example, a “laughter therapist” must naturally present herself as not only a professional in a

trade, but also as a humorous and easygoing person, whom everybody might want to spend time with.

Case – fame and fortune. Additional service offerings spun from the existing bathing facility at the Mývatn Nature Baths, were initially centred on the success of Iceland's first gym entrepreneur Jónína Ben. She pioneered the idea of detox treatments in Iceland and started offering them in the Mývatn region so her clients could “get away from it all”. Her reputation was instrumental in the success the effort enjoyed for the period it lasted. Another therapist offering yoga and EFT treatments is building her reputation. For her there is a need to maintain the aura of authenticity around her work and for that she draws on a foreign exotic background from South Africa.

Treatments and other wellbeing offerings most often materialize one-on-one in private compartments between the professional and the client. However, accommodating for social relationships in the traditional spa and wellness facility is to some extent based on tourists' “gazing” (Urry, 2000). Pool areas, saunas, gardens, restaurants and other facilities are public or semi-public spaces, where gazing at others' bodies and behaviours is allowed, even invited. Furnishing and decorating underlines the yearning for visual and audible experiences. Dress/undress codes can be important as well, and the use of mirrors is a well-known element of combined narcissism and gazing. As illustrated by Smith & Puczkó (2009), gazing is also a matter of complications, and some customers prefer specialized facilities where their body shapes or diseases do not invite others to look. For these reasons mixing pure leisure activities and health treatments for people with serious and conspicuous diseases is controversial.

In a purely social sense, the use of wellbeing facilities is often a joy for groups of friends, and the facilities are a way to do something together. The facilities may accommodate for socializing, example in hot tubs or in relaxation and restaurant areas, and in connection with outdoor activities.

Case – after skiing: The destination of Åre clearly shows the importance of social networks. Åre is popularly often referred to as ‘Little Stureplan’, Stureplan being a trendy part of Stockholm with some of the most well-known and popular night clubs and shops. During the winter season many of the same groups of people go skiing in Åre, which is one reason why the resort has acquired its trendy image and high social status, sometimes looked upon as a place for richer tourists. It has turned into a venue for certain groups of people. Another aspect of this was described in the interviews, where it was clear that people found it almost impossible to gain acceptance as a business within the destination if not part of the local ski association and the skiing lifestyle. Much information and many informal decisions were discussed at these informal meeting places.

Case – sauna socializing: The Finnish sauna tradition includes a strong social element. In addition, to belonging to everyday life in Finland Sauna is used as a part of social events e.g. among groups of friends or in business meetings. Social events built around sauna are called “sauna evenings”. These include going to sauna, relaxing, eating and drinking. This social aspect is utilized in different contexts by bringing sauna near people by using mobile saunas. Several businesses or events/festivals have offered their customers an opportunity to go sauna in situations where it normally would not be possible. For this in Finland there are several sauna trucks, buses or other transportable saunas that can be used. E.g. in summer 2010 the sauna truck of a radio channel travelled around Finland visiting several music festivals.

Case – extending the sauna concept: The Finnish spa concept differs somewhat from the spa concepts in Europe. The majority of Finnish spas have been made for recreational purposes. The main motivation for people to go to these spas is being together with family and friends

and having fun. It can also be claimed that in Finland spa business, broadly defined, has reached another level as a result of the introduction of the outdoor, wooden heated, hot tubs.

Case – hot and cold: The Icelandic tradition draws strongly on social elements with several of the interviewees describing an intense sense of wellbeing with others when resting and relaxing in a warm pool on a winter night. This has been explained in terms of hot water social ecology (Jónsson & Huijbens, 2005), focusing on pools as a venue of regular physical exercise (body) and epicurean delights (social/soul) (see also Jónsson, 2009).

It is an issue of some concern for the industry that the whole idea of wellbeing appeals mostly to a female category of users, predominantly in the mature age groups from 45 and up. The lack of a clear and more inclusive social dimension is regarded as one of several explanations for the low attendance by children, men and women of other ages. Interviews conducted throughout the research illustrate that including more outdoor activities in overall wellbeing concepts may ensure a wider appeal.

Case – family wellbeing. In an attempt to find common ground for family members, Danish actors worked with a wellbeing family concept that included treetop accommodation, cooking healthy food in the open air, trekking in the forests, play and exercises. Traditional spa activities were also available. This offer aimed at binding families together in a search for healthier lifestyles. Pilot tests were well received by the target group.

Case – Christmas events. In Iceland the warm geothermal pools create the perfect venue for play while relaxing. In addition to this the Mývatn region is home to the 13 Icelandic Yuletide lads and they bathe in the Mývatn Nature Baths facility before each Christmas in the month of December. This event marks the opening of the Christmas preparation festivities held annually in the Mývatn region with the involvement of all tourist operators in the region.

Case – technology as a facilitator. In Finland younger groups are becoming interested in participating in different nature activities due to technological equipment. Geocaching offers an opportunity to monitor the training and e.g. hikers can put on their GPS device or activate GPS in their mobile phones. The GPS keeps track of the route hiked and after the hiking it is possible to see the route walked on a map, the length of the hike and the time spent on doing it. This can all be shared in social media. Such new kinds of technological solutions are seen to attract people not originally interested in outdoor recreation or nature activities. This also presents a new target group for extended wellbeing tourism businesses. In Eastern Finland new tourism products and services are being developed around a treasure hunt theme using geocaching.

Widening the potential customer appeal is an important step forward for Nordic destinations, and comprehending and integrating the social element and catering for the needs of love and belonging is obviously a critical part thereof.

2.4. Learning, self augmentation and wellbeing

The term “mind” was mentioned above as part of holistic wellbeing. Many providers of wellbeing services aim at motivating wider lifestyle changes. It is not well known whether lasting changes are effects of brief wellbeing tourism experiences. Nevertheless it is normal to postulate that presence in new environments will affect the workings of the mind. A fitter body and a beauty treatment can, of

course, contribute to self-esteem, and the whole effort may be part of a planned self-augmentation and self-control endeavour.

Case: The Social Status of Åre. Where we travel and what we do while travelling is closely associated with who we are or who we wish to be. Hence, our travels add to our identity and possibly also to our self-esteem. The destination of Åre, which for a long time has been connected with high social status has been and still is regarded as a trendy 'spot'. In its further development into a variety of wellbeing elements, Åre is maintaining its high social profile and possibly also the physiological side effects for self-esteem.

According to Douglas (2001) and Smith & Puczkó (2009) the wellbeing experience is for many not only a one-time treat or a pampering joy, but is part of a continuous learning process of life mastering. When ordering coaching sessions, the customer is very likely to have planned some changes in his/her life afterwards. While eating healthy food is a strong element in many traditional spa packages, learning about the preparation of healthy food and composition of diets has, potentially, longer-lasting effects. Likewise, medical treatments are meant to be maintained at home. Learning life-mastering competences, for example under the heading "stress relief", seems to enter the programmes of wellbeing as a result of a general demand for assistance for such delicate matters (Laing & Weiler, 2008).

In the Nordic countries, where most couples have separate careers, the raising of a family represents an extreme pressure, for which many are not well equipped. It has become more accepted that even well-functioning families seek advice and assistance to smooth family life and make the family members happier, and to improve collaboration. This also translates into tourism related wellbeing demands, where there is an emphasis on learning experiences or on psycho-social guidance.

The studies reveal a range of examples where wellbeing tourists are offered a distinct learning ingredient in addition to the service:

Case – just in time storytelling: Consumers of the transmodern lifestyle do not want to wait. They wish to be informed on the spot, immediately, without delay, in a short and straightforward way. Traditional signboards found along trails in the World Natural Heritage site of Kvarken (Finland) for example, tell about plants, meadows, swamps and fields and what it does to health. On the walls of historical buildings the local story is updated to match the demands of the modern traveller.

Case – foraging as a meaning-giver: In Eastern Finland a business called Metsämatkat ("Forest journeys") organizes various excursions into forests. These guided tours are divided into three product categories: Forest Power, Lake Power and Empowerment. Forest Power includes a tourism product called Mushroom Hunt. Before going into nature, customers are taught about the forest and nature they are about to enter. They learn about trees, herbs, wild mushrooms, the landscape and also the forest culture. When they are in the forest guides explain different mushrooms and shown the best techniques for picking them. During the excursion stories about the woods and what is in them are told. At the end of the trip, the mushrooms picked are cooked and eaten by the group. All the products include a nature element and relaxation in a natural environment. The mental aspect is very strong and the aim is to absorb and embed power from nature. In addition some tourism businesses in the region use mainly local ingredients in their restaurants. For example, Anttolanhovi offering accommodation, wellbeing and conference services, serves locally produced food in its restaurant. The basic ingredients are purchased directly from local producers. For instance, the meat comes from private small butcheries, fish from local fishermen and some vegetables from local farms. In addition, the berries and mushrooms come from the Lake Saimaa region. The juices and jams are made from

berries grown on local farms. The bread and pastries are also made on the spot. In addition to local ingredients Hotel Kalevala in Kainuu region serves traditional local dishes. Both businesses have created working networks with the product suppliers.

Case – adapted diets. The Beito Experiment tried to test out healthy nutrition in combination with exercise and nature experience together with users at Beitostølen in Norway. Breakfast, lunch and dinner were carefully thought through and arranged in advance in the experiment. For breakfast, all “temptations” were taken away; this - not surprisingly - was received very differently in the group of tourists. Some enjoyed it, while others would have preferred to choose what they wanted to eat themselves. Lunch was supposed to be consumed outdoors and was composed and created based on the recommendations of Petersen, Chuey & Morrell (2010) for nutrition before or during physical activity. The food had a great taste, but the problem was the wrapping and the challenges in case of bad weather. This led to the conclusion that the participants would rather enjoy the traditional Norwegian *matpakke* - a simple open sandwich on dark bread which was healthy and good - rather than having a “fancy” lunchbox. Still, the main focus for the nutrition part in this test was the wellbeing dinner. The test adopted ideas from the gastronomic creator Honorary Doctor Brimi. Nordiske nasjonalretter (Brimi 2005) was suggested in the test to be the best source for creating a healthy Nordic dinner – in particular working in a Nordic wellbeing context. The experiment group’s statements combined with experts’ opinions on a healthy diet concluded with a few adjustments that traditional Nordic food suits well in a wellbeing product (Nasralla 2010).

Case – local food supplies. Around Lake Mývatn, in Iceland, farmers have been active partners in an Icelandic government initiative called “Food from the Farm”. The focus is on traceability and local food and the clear underlying assumption is that authentic local food is more in tune with nature and is thus healthier. However, no coherent marketing or product development so far exists in terms of food for wellbeing in the region. The services in the Mývatn Region are thus often complemented with local food marketed as such, vaguely contributing to a feel good factor of the visitors in a rather broad comprehension.

Case – continued wellbeing at home. The memory for healthy living and good practice is usually very short. It is recognized by the Danish Comwell hotels and spa chain that customers need follow-up, easy-to-follow instructions in handbooks or on the Internet. The hotel and its spa product manufacturer have published booklets on home treatments. The side effect is a loyalty to the spa facilities and – equally important from a commercial point of view – repeat purchasing of the spa products.

Many of the products and services in wellbeing facilities are marketed with spiritual connotations (Wilson, 2008) and even with religious references (Timothy & Olsen, 2006). Yoga is of Asian origin, and the philosophy and practice are popular and very applicable in relation to wellbeing products all over the world. D’Andrea (2007) claims that many users of wellbeing appreciate a touch of mysticism. Numerous treatments are sold with reference to energies and forces that are not evidence-based.

Case – natural wellbeing: In the Icelandic case the uses of geothermal waters for health and wellness tourism development might benefit from a more explicit reference to natural experiences. In the Mývatn region this refers specifically to the view to the highland wilderness interior of Iceland afforded by the Mývatn Nature Baths. The Icelandic wilderness offers peace and quiet, as well as the lucid interplay of light and colour that has inspired many an artist both past and present. Spas and bathing spots, whether geothermal or not, attempt to ensure that they are nestled in peaceful surroundings with views that allow a view of vast wilderness and nature. These could then allow tourists the “reconnection to reality itself” and open their minds to perfect beauty and what life is about (Skúlason, 2005, 7). From the survey done in the Mývatn region it seems clear that it is possible to convey on site messages to tourists about

what the place they are visiting is about. Thus an explicit reference to the qualities of nature as affording this sense of oneness and plenitude should be an integral part of health and wellness product development. The products developed for health and wellness tourism could thus facilitate a sense of calm and internal expansiveness and the term proposed is agoraphilia.

The cases above illustrate opportunities for supplementing the Nordic wellbeing experience with distinct and appealing learning and self-augmenting elements. The food element is obviously an appropriate way to start product enhancement, as it has excellent potential for activating of the tourists as well as distinctive storytelling and framing of destinations.

2.5. Transcendence and wellbeing

The term transcendence has been used by many scientific disciplines to define something that lies behind the obvious or beyond scientific probing, a more global purpose or some overarching idealism. Transcendence shifts the focus away from the immediate needs of only the ego, emphasising the role of the individual in a larger perspective, e.g. the family, the local community, as a citizen and through responsibility towards the globe and its population. This perspective may sound like a genuine contrast to the pampering vision, but working for a larger purpose is also meaningful for the individual to the extent that it is possible to talk about an additional wellbeing dimension.

Where does transcendence come in? In the Nordic context the natural environment and its conservation are claimed to offer an extra connotation for the tourist. Aligning with ethical standards can be a symbol of attention to purposes beyond oneself – or perhaps a small compensation for the significant carbon footprint connected to taking holidays in remote areas (Wilson, 2008).

In all the Nordic countries, the marketing of tourism products in general revolves around the purity of nature and how the place affords an authentic connection to nature itself and shows us how the world is supposed to be without the polluting and crowding effect of people. Likewise, surveys made, for example, by the Swedish Tourist Board (Visit Sweden), show that many foreigners associate the Nordic countries with clean environments. However, there is very little to inform the customer on how to become specifically involved in conserving these outstanding natural resources. Opportunities that enhance the tourist's feeling of wellbeing through making a contribution to the environment are not well developed in the Nordic context.

Social responsibility for the host community and its population is seldom a primary motivator for the tourists, when they visit a destination. It is very difficult to execute such a responsibility as an individual tourist, if this is not prepared by the host community itself. However, enterprises and destinations are keen on meeting the "feel good" needs. Corporate social responsibility programmes (Williams, Alison & Ponsford, 2007) are emerging in many places and added as arguments in marketing. Some categories of customers want to contribute, either by paying a premium on price, or by offering some voluntary activity.

Generally, the laboratory areas are not advanced in their understanding of the transcendence element in wellbeing tourism.

2.6. Maslow and wellbeing tourism

The steps introduced above in subchapter headings 2.3.-2.5. are closely related to the well-known hierarchy of needs developed by Maslow (1943). The five needs of every human being, according to

Maslow, are; physiological, safety, belonging, esteem, and self-actualization. His conclusion was that the human condition is a perpetual state of want, aspiring to the satisfaction of each of the layers in the five-tiered hierarchy. Recent research has added the sixth step, the transcendence step, which illustrates the ways in which needs aspire beyond the ego (Smyth, 2005).

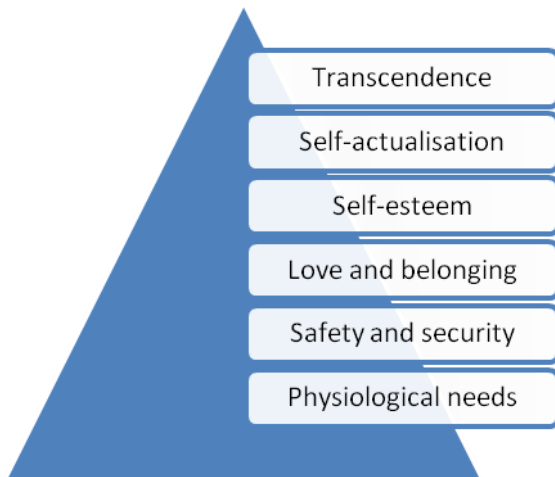


Figure 1: Maslow's pyramid of needs - adapted by the authors

Figure 1 is useful as an illustration of the volumes of potential demand in relation to each of the six steps. Because of its clarity and usefulness in terms of product development and marketing, the model has been employed in connection with tourism a number of times (Mak, Wong & Chang, 2009). In the case of wellbeing, it is likely that pampering – the lower part of the triangle – might also in the future play a significant role in wellbeing tourism, while more sophisticated offerings that address needs at upper levels will meet an altogether more limited demand. Seen in this perspective, the emphasis by business providers on the traditional pampering in spa and wellness facilities is very understandable.

The pyramid also suggests a dynamic process. The current business interpretation of what the hierarchy amounts to is that general consumption takes place at the lower level needs, with the fulfilment of emotions and self-actualisation as harder consumptive practices, but integral to consumption at the same time (Iyer & Muncy, 2009). Wellbeing as a consumptive practice is here interpreted as aspirational, or something that can be obtained through purchase. This aspiration transpires, in the way in which people attempt to signify a high(er) social status by catering to wellbeing, e.g. through buying more expensive brands and more sophisticated and demanding products, and demonstrating superior taste or ethics through their choice of venue and through the act of purchase (Bourdieu, 1989).

In practice, enterprises and destinations are therefore obliged to focus and attempt to reinterpret, reinvent and reconstruct the products according to upper-level needs. As shown in the case studies from the Nordic laboratory areas, this is a process which has been initiated, but is hardly up and running. There is clearly a gap in the attention to long range developments of consumer needs in the wellbeing field.

The Nordic countries are characterized by high costs, cold climate and vast wilderness areas. These characteristics appeal to customer groups far from the simple pampering segment. Customers are likely to be challenged beyond their personal “comfort zone”. The circumstances in the Nordic countries call for an innovative approach which addresses other upper level human needs, and which works on making the tourism products attractive on the market and economically attainable.

The next chapter will address product images and how to work with innovation in this respect.

3. Unique selling points in Nordic wellbeing tourism? Competitive strengths and weaknesses

3.1. Introduction

This section addresses the unique selling points of the Nordic countries in relation to wellbeing tourism. Unique selling points are defined as advantages or customer benefits that differentiate a destination from its competitors. Part and parcel of each unique selling point is to provide images that serve as a foundation for branding. Such images are verbal and/or visual symbols that ensure a clear promotion and communication of the place and its uniqueness. A crucial issue in the process, and generally the first step, is to scrutinize the identity of the place (Therkelsen & Halkier, 2008).

Excavating the unique selling points of destinations is an exercise of destination management organisations (DMOs) and branding organisations. Generally the efforts are regarded as complex and difficult (Morgan & Prichard, 2002). Concretisation of a place's identity may be established through a collaborative process, with the participation of many stakeholders in the region and with filtering and assessment procedures of varying sophistication.

This chapter builds on the collaboration with the laboratory areas, where the image and the selling points have been discussed. The chapter also summarizes the content of the Delphi study, which focused on the Nordic region as a whole.

3.2. The Nordic tourism selling points

Statistics prove that the popularity of the Nordic countries as tourism destinations has increased in recent decades (Hall, Müller & Saarinen, 2009; Müller & Jansson, 2007). This is not the result of a joint and easily comprehensible brand of the Nordic countries. There are many attractions, but generally nature and natural phenomena play an important role. The countries are favoured by a significant variation of landscape types and climates, and there are numerous possibilities for activities in all seasons. As traditional tourism destinations become more crowded, people seek alternatives and find their way to and enjoy vast and sparsely populated areas. The Nordic countries are also being portrayed in international glossy magazines and TV programmes for their urban qualities and cultural variety. Some Scandinavian design ingredients play an important role for the general image of the countries (Roncha, 2008), and the heritage likewise (Halewood & Hannam, 2001).

Therkelsen & Gram (2010) in their studies of branding images found that "the Nordic countries appear as a region 'in the far corner of Europe' presented primarily as a location with extreme nature conditions and exotic cultural habits." (p. 107). Therkelsen & Gram (2010) conclude that the Nordic countries lack a distinct profile in the attempt to satisfy all target groups at the same time, and that "supra-national place branding is highly complex in terms of multiple identities, diverting interests and national rivalry." (p. 126). Research by Puczkó (2010) underlines this finding, but what the respondents in Puczkó's study could identify as unifying for Nordic health and wellness were medical traditions and professionalism in the Nordic countries.

The national Nordic tourist boards are in charge of marketing their respective countries. They address wellbeing in quite varied ways. Going from East to West, in Finland, the Finnish Tourist Board has started to create a product out of the well known Finnish sauna tradition. On their websites the

wellbeing tourism supply is divided into three categories: health and fitness, spa and treatments, and sauna (www.visitfinland.com). They have also started to develop FinRelax as a trademark and supply guideline for Finnish wellbeing products (Finnish Tourist Board, 2008). It is stated on the site of Swedish Tourist Board that “Wellness ‘Swedish style’ is what you want it to be” (www.visitsweden.com) but the main emphasis is on simplicity and cabin living, either in the forest or on an island. Looking at the website of the Danish Tourist Board (www.visitdenmark.com) activities and life enjoyment feature as inspiration and the emphasis is on fun and relaxation. Nothing specific emerges there that will set Danish wellness apart from anywhere else. In Norway the website of the tourist board (www.visitnorway.com) has no special focus on wellness and wellbeing, but what emerges if the words are searched via the site are general spa service offerings at selected hotels. Nature looms large in Norway, however, and the actors claim to be powered by it, entailing a sense of spirituality or self-actualization through experiencing nature. In Iceland health and wellness do not feature on the tourist board marketing homepage, although some indications can be gleaned from linked regional marketing pages. This has though changed in December 2010 with a new homepage of a recently established health and wellness cluster (www.islandofhealth.is). To conclude, in terms of wellbeing there is hardly, at the outset, a joint image or unique selling points for the Nordic countries.

In the following the Delphi survey will be presented in order to approach a specification of the images particularly in relation to wellbeing tourism.

3.3. The wellbeing unique selling points

The respondents in the Delphi survey were asked to what extent a *Nordic wellbeing* concept would have to be based on the nature resources of the Nordic countries, and the respondents totally agree that nature is the most important selling point. Some explanations follow:

Citation: The nature is there, and there is a freedom to take part and use the resources

Citation: The pure is a strong argument in terms of wellness

Citation: The Nordic nature is spectacular

Citation: Life style habits related to nature should also be considered.

There are splendid natural environments in many places, but the respondents find the fact that nature is not fenced and privatized a powerful differentiator from e.g. the Alpine region.

Resources that match up well with wellbeing are listed in Table 3.

Table 3: Positive vocabulary of wellbeing unique selling points.

Substantives	Adjectives	Verbs
Fresh air	Beautiful	Move
Clean landscapes	Unique	Glare
Sea	Pure	Reflect
Lakes	Fresh	Freeze
Forests	Clean	Walk
Mountains	Spectacular	Hike
Hot and thermal waters	Peaceful	Swim
Hills	Still	Bathe
Wildlife	Cold	Soak
Berries	Hot	Gaze
Mushrooms	Crisp	Sail
Rivers	Balance	Experience
Sunlight (summer)	Light	Sleep
Northern lights (winter)	Dark	Relax
Sandy beaches		Feel
Fjords		Sense
Snow and ice		
Geothermal activity		
Volcanic activity		
Fish		
Weeds		

The Delphi survey shows that different activities emphasising customers' own active role are crucially connected to an image of *Nordic Wellbeing*. Activities are mainly outdoor sports and special interest pastimes such as hiking, biking, angling, Nordic walking, and birdwatching. Smith and Puczkó (2009, 6, 112-114) sum up the Nordic features: "In Scandinavia, there is a large emphasis on outdoor recreation such as Nordic walking, cross country-skiing, and lake swimming, even in winter". Gelter (2000) describes the typical strong feelings about nature in the Nordic countries, and the ability to be absorbed by a place, where the landscape interacts with the senses. This has nothing to do with the adrenaline rush that can be experienced in adventure tourism. Further, the products, services and treatments hinted at above as being connected to *Nordic Wellbeing*, such as sauna, bathing, locally produced food (also from forests and the sea), healthy diets, cryotherapy, and hot and cold water based treatments, enable for wellbeing not excitement. Berries and other natural ingredients (e.g. seaweed, algae) can be used as food but also as part of health and wellness treatments.

In addition to the natural resources, service quality and design are mentioned as important issues. However, the service aspects are seen to differ somewhat regarding the culture and tradition of the five Nordic countries. At a general level, a *Nordic Wellbeing* concept must be supported by a range of utterly intelligent physical and organisational infrastructures in order to reap the benefits of the natural endowments.

In the eyes of the respondents to the Delphi survey, wellbeing tends to be a much broader concept than wellness, and wellbeing is a well chosen term to illustrate what characterizes the resources and opportunities in the Nordic countries.

Citation: Wellbeing is more emotional than wellness.

Citation: Tranquillity is becoming more important in the stressful world.

Citation: It must be combined with healthy food.

Citation: Slow, silent environments.

Citation: Contemplation in awe-inspiring natural landscapes.

One of the respondents reflects on the contrasts: light and dark, hot and cold. He/she mentions that it is unique to have a sauna culture where you also dip into a freezing lake or roll in snow. It is also an amazing experience to sit in thermal waters surrounded by snow.

It was surprising that technology and technological solutions did not receive marked attention from respondents even though the Nordic countries are seen to be well ahead in these issues. The Delphi survey did reveal an inclination to focus on nature as a unique selling point, but emphasized that this is not sufficient, and that the Nordic countries must introduce other competences and qualities in order to differentiate from the numerous competitors around the world. The cultural dimension must be brought into the perspective as well.

The respondents to the Delphi survey underline more or less the same issues as respondents in the customer surveys. However, the wellbeing unique selling points as they are listed in Table 3 above, are not sufficient in terms of generating a powerful product profile, neither are they sufficient to generate strong visual or verbal images. Subsequent to this investigation, the terms and findings have to be refined or combined. Combining natural resources with cultural features is especially decisive. There is awareness in the Nordic area of the difficulty in reaching the right amalgamation of images that can cover such a large geographical area with many competing actors.

3.4. The lived Nordic values

When addressing cultural elements it is necessary to take the local population's understanding of wellbeing into account. A population with interesting (also exotic/bizarre) traditions and culture is not only an object for the tourist gaze. The traditions and the values behind them may transcend the products and services that constitute the tourists' experience. In terms of tourism and local culture Hall, Müller & Saarinen (2009, 176) explain the Nordic culture of second homes: "staying at the cottage is an important part of national folklore; it is also a special part of family life, and thus in tourism it is promoted as a means of experiencing the Nordic way of life". Gelter (2000) suggests that Nordic outdoor life has a special ethos and practice.

Case: Involving customers and users in content development. Sauna from Finland is a concept aiming to create new memorable service innovations connected to sauna. In Jyväskylä region local residents were interviewed to get more aspects and ideas to Sauna From Finland process. The Jyväskylä Regional Development Company Jykes Ltd and the newspaper *Keskisuomalainen* organised a competition. This was targeted mainly at the readers of the newspaper. The competition was implemented during the summer of 2009 and aimed at collecting different sauna stories and pictures from local people. These personal experiences, stories and pictures about saunas and sauna culture were stored for later use in the Sauna from Finland concept and product development (www.ksml.fi/sauna). This way the local traditions and ideas are now also available in tourism product development.

Case: Transforming the Kalevala tradition into products. The private enterprise Kalevala Spirit Oy Ltd. in Kainuu region attempts to elaborate in creative ways the Kalevala tradition of

Finland. Three different product lines have been developed: Kalevala Spirit Gourmet, Kalevala Spirit Design and Kalevala Spirit Experience. For instance, traditional feasts are organised in the Kalevala village in Kuhmo.

There is a range of international studies that attempt to determine important values by country, and very characteristically the Nordic countries usually end up with very similar characteristics. The Nordic countries score high on a range of health, happiness, economic, and political indices. What also influences perceptions of wellbeing in the Nordic countries is the role of the Nordic welfare state, of which the key components are still perceptible distinct as; universal social policy programmes and equality in opportunity and outcomes as explicit goals in social policy with relatively even income distribution, a large public sector as a proportion of GNP, extensive transfer programmes and services, high/full employment and high taxes (Greve, 2004; Lundberg et al., 2008). The public sector plays a large role in providing for wellbeing and as such plays a crucial role in the concept of wellbeing tourism, i.e. state provision of health related leisure activities. Hjalager (2005) in this context even goes so far as to suggest that the interweaving of leisure and holiday frameworks into coherent welfare legislation has determined much of innovative activity in Danish tourism for the past half century. At the most general level, the welfare state has directly impinged upon tourism with subsidising holidays for health and recreation to secure equal access for all.

Under the headline: Nordic lived values the Nordic Council of Ministers (2005) highlights the following decisive commonalities:

- Equality – taking care of each other
- Trust – trusting each other
- Low power distance – meeting each other on equal terms
- Inclusion – want to bring everybody in
- Flexibility – investigating and adapting to changes
- Respect for nature – sustaining flows and resources in a long-term perspective
- Protestant labour ethic – finding work meaningful
- Aesthetics – valuing simplicity and harmony.

These are claimed to be of particular importance for the competitiveness of the Nordic countries. The Delphi survey and also the interviews attempted to confront the respondents with these lived values. The outcome of the Delphi survey is not entirely conclusive. The respondents tend to agree that the lived values are convincing as stated, but that it is difficult to translate them into a wellbeing tourism product, at least directly.

Case – considering nature in architecture. Anttolanhovi's new Art and Design Villas built a few years ago reflect the value of respecting nature. In 2006 Anttolanhovi organized an architectural competition for young Finnish architects to design villas to the shores of the Lake Saimaa in Eastern Finland. The goal was to find buildings that were suitable for the scenery. The winning villas were adapted to the landscape and celebrate nature as inseparable part of the nature. In building and management of the villas nature-oriented thinking, recycling and minimally processed materials are utilized so that the villas will leave as small an ecological footprint as possible. The villas are so-called eco-timber houses built with natural materials. For instance, the wall coverings in the houses are also natural materials. The walls are made of Finnish birch, the floors are made of natural stone and the paving slabs are Finnish stone. Linen, cotton and wool have been used for indoor textiles. In addition, the villas are furnished with furniture, art and other Finnish design products.

Taken further, the aesthetics and valuing of simplicity and harmony and taking care for the environment are the most specific of the Nordic lived values that can be associated with wellbeing in

a long-term perspective. Other values entail a far stronger interaction between the locals and tourism in order to make the lived values really understandable to the tourist. These values are still to a considerable extent tacit. They are very difficult to express with credibility.

Case: In Iceland the issue of Nordic lived values can be neatly captured in some interviewees' predisposition towards nature.

"... at heart we are naturalists, BUT in order to survive and live where we live then we need to develop like others despite of nature – and this can all work together..." (Municipal spokesperson)

"... I just receive some energy here, from the cliffs above the water and something ..." (Local tourism entrepreneur, talking about the nature bath Grjótagjá)

"... one receives some kind of energy being there either in winter or summer, you get a certain energy from nature – it is so spectacular..." (Tourism marketing agent in Reykjavík, about the Mývatn region)

"... the great synergy of nature, the energy all-round, the land and man's wellbeing ..." (Tourism consultant from the Friends of Water in Reykjavík)

The municipal spokesperson shows clearly the issues of contention. The locals need to develop infrastructure and industry, whilst perception from others (especially if they are in Reykjavík) is that nature should be there for nature's sake.

The interviews also reveal some other underlying controversies. In spite of the fact that the Nordic space is vast and that collaboration, trust and openness is widespread in the population, competition for resources can threaten to compromise a truthful use of the lived values:

Case – the missing link. In the Mývatn region in NE Iceland, respondents could easily identify with the lived values presented above, apart from that of trust. Tourism in the region has developed rapidly with exponential growth in visitor numbers, so competition is rife. This is compounded with intersectoral rivalries in the region and a long-standing debate around the valuing or uses of natural resources in the region. All this competition and rivalry has led to the erosion of trust.

3.5. Unique selling points – experience from the laboratory process

The work in the laboratory areas offers some supplementary views on the unique selling points in relation to *Nordic wellbeing*. The bottom-up approaches with many stakeholders involved reveal the difficulty of determining viable and comprehensive expressions of values, images and selling points that could account for a larger geographical space, preferably all the Nordic countries. When analysed, the case studies illustrate regions with different approaches to defining unique selling points. In the following, an analytical distinction is made between:

- **Focused selling points** – where the region has been able to select quite specific images and values that represent a joint understanding of the products and the customer preferences.
- **Attached selling points** – where the wellbeing theme is related to a major other tourism image, and where it lends its images and values from this.
- **Diffuse selling points** – where the region is not really inclined to undertake a selection of unique images and values and thus to discard other images and values.

Focused selling points. Some laboratory areas have initially been devoted to the selection of quite specific images and values that represent a joint understanding of the products and the customer

preferences. However, the process is usually long and complex, and often compromises are made. The development and promotion of South Ostrobothnia, Finland, as a wellbeing tourism destination is most clearly in full progress. The unique selling points revolve around three dimensions “Sauna and delicacies”, “Spas and treatments”, and “Health and fitness” including several sub-dimensions.

The Beitostølen Destination and the Valdres Health Cluster are in an active process of turning the region into a health tourism region, and it is reasonable to assess the efforts as focused. Beitostølen has performed significantly in developing facilities and programmes for certain segments, e.g. disabled, the blind and asthmatics. Training programmes for athletes are part of Beitostølen’s celebrated offerings. In this context it may indeed be that Beitostølen has reached a unique selling point. The development process has been supported by the Norwegian government through the ‘Arena Project’ which provided financing and expertise. Having to comply with the requirements in the Arena Project helped to focus, and financing has been a catalyst for the development.

Attached selling points involve regions where the wellbeing theme is related to another major tourism image.

Åre, in Sweden, is famous for its mountain Åreskutan. It is the basis for the destination’s successful tourism development. In the winter the mountain is essential and the image of Åre is clearly inseparable from skiing. However, its good reputation as a winter resort has helped tremendously when developing the shoulder seasons and the wellbeing component still has an “attached” status. The bike park, for example, has gained many advantages from its famous location on Åreskutan and the events organized – many closely related to wellbeing – have also benefited both from Åre’s good reputation as a resort generally but also from its world-class skiing. The successful development in Åre in extending the season can simply not be explained in terms of extraordinary hiking trails or spas beyond all others. An important explanation is to be found in its success as a ski resort and its image as such. The image of providing ‘top of the line’ in the winter has been transferred to the snow free season and many visitors simply expect the same quality in other wellbeing products provided by and in the destination.

Attached selling points can also be claimed to be in operation in Jyväskylä region in Finland. The Sauna From Finland network is attempting to borrow image and reputation from other tourism activities, such as, for example, the Neste Rally Finland, but at the time intensifying the Sauna theme through a massive effort. The goal is to turn the Jyväskylä Region (and Central Finland), into an international innovation centre for sauna culture. To do this the Sauna From Finland association was founded to take charge. The association has business members from different industries and from development organizations. At the moment, the efforts are largely attached to the previous structures of the region, but eventually, the increased emphasis on the sauna culture may introduce a larger turnover of the global image of the region.

Diffuse selling points occur where the region is not really inclined to undertake a selection of important images and value, and this is predominantly found in the laboratory areas in Denmark, Iceland and Finland.

The Region of Southern Denmark has initiated a productive strategy process which brings together diverse groups of actors from the wellness industry and beyond. The process has increased transparency, enhanced knowledge formation and motivated collaborative relations, and it has resulted in the launch of six specific initiatives. These initiatives cover a very wide range of wellbeing related activities. The whole initiative goes under the logo “Welcome”. The work in the laboratory area has been intensively supported by the Destination Marketing Organisation Visitvejle, but

altogether it has been a pragmatic, bottom-up approach, where the activities have been constituted by whoever chose to be active. Thus, the mode of operation (its advantages untold) logo and slogans have been produced during the process, but analysis of the market shows that customers to the region are hardly likely to respond to traditional branding methods. From the outset, no unique selling points were identified that unify the region's products and the desires and needs of the guests.

The situation in the Mývatn region is also complex and selling points are still diffuse. Due to the aforementioned lack of trust the marketing of the Mývatn region as a wellbeing destination remains problematic. The marketing of the region as a Nordic health and wellbeing destination also suffers from a lack of knowledge about what that would entail, and falls prey to the same ethos of compartmentalisation and competition. Interviewees were asked about the region as a Nordic destination in a twofold manner. Firstly, on the conception of Nordic wellbeing and what that constitutes. Secondly, the question was if and how learning could be derived from Nordic health and wellbeing operations. The entrepreneurial perception of a specific Nordic wellbeing concept was very vague. Still hints of what was outlined above as Nordic wellness tourism emerged through notions of solitude, nature, and primarily cold. In terms of learning, those belonging to the medical establishment were in formal relations with other Nordic colleagues and implementing in Iceland best practices from other countries. Business entrepreneurs on the other hand mainly saw management practices and service infrastructure to be more developed in other Nordic countries and that they could learn from this. What clearly emerged though is that what Iceland has is hot water and combined with nature, cold and isolation the hot water provides for wellbeing through the continual juxtaposition of hot and cold, in effect a cleansing pulsation for body and spirit. This could indeed provide the content of a specific Icelandic wellness tourism product that is in line with parts of the Nordic vision of wellness. There is no shortage of ideas in the region, but their combination into a coherent package geared towards a vision of wellbeing and viable business practices, possibly in collaboration with the local medical establishment is lacking. The tourism development in the region seems to be lagging behind as visitation increases, but then again the pronounced seasonality the region suffers from needs to be borne in mind, but wellness development should be aimed at correcting this.

The Finnish Vuokatti region is attempting to profile itself under the slogan "Versatile Vuokatti". Using the term "versatile" is probably slightly self-contradictory and not focused. It is a reflection of the resources in the region. Vuokatti region has a wide service infrastructure and services and many different entrepreneurs and actors offering diverse services. The supply of versatile services refers to the multitude of services available for different customer segments and services are available all year round. In this case the wellbeing supply is only one theme under Versatile Vuokatti.

3.6. Unique selling points – strengths and weaknesses

The above analysis shows that nature, broadly speaking, is the strongest argument in the *Nordic Wellbeing* tourism product, it even accounts for Denmark, which is significantly more urbanized and more densely populated than the other Nordic countries. A major weakness is that the actors find it difficult to work comprehensively with nature as a unique selling point. Basically, nature is understood very one-dimensionally, as a space and resource in which tourism activities take place. Nature is mainly for gazing at and moving in. However, many other regions also have spectacular nature with some of the same climate features, e.g. New Zealand, Canada and Alaska. If unique selling points should be developed it is necessary to attach cultural elements to nature and to ensure a wider interpretation which is closer to the Nordic lived values, and which flags up the specific ethos attached.

Inputs from the Delphi survey indicate some ways to go to address and attach culturally interrelated selling points, where nature is still the essential foundation. Thus, **aesthetic values** are powerful, and there is a good opportunity in terms of enhancing the connection between nature, architecture and design. Considerate, careful and planned location of wellbeing facilities in nature and the use of materials from nature are parts making the selling points unique. The aesthetic dimension match well with some of the adjectives mentioned in Table 3: fresh, pure, clean, light, crisp etc, and needs to stay squarely focused on simplicity and harmony with the environment.

Responsibility for nature is another key term in the Nordic lived values. However, it might be only modestly clear to wellbeing tourists how the sustainability policy is consistently organized and how it affects the product and services in the destinations. Responsibility is an attitude and way of acting, stirring adjectives such as clean and fresh. Making clear the long-term agendas and responsibility towards the environment is an important feel-good and thus wellbeing factor for tourism.

Again seeking inspiration from the lived Nordic values the term **involvement** comes up. It is clear that relations with the local communities are of importance for segments of tourists. Fulfilling learning, self-augmentation and transcendence perspectives as described above, impose new competences among the planners and providers of services, and new ways of describing the profiles. Involving is also about improving the wellbeing dimension as selling points to segments not usually considered core customers, i.e. men and children. Involvement also subsumes equality and taking care of each other, a key tenet in the Nordic lived values along with inclusiveness and trust. Accordingly the “people dimension” is a potential strength for the future.

Lastly, the above-mentioned people dimension needs to embrace a service mentality that entails flexibility and **adaptive** capabilities. The lived values entailing low power distance and inclusiveness need to be translated into a service ethos that caters to the needs of each individual. Where staff are happy in their work, finding it meaningful, they are motivated and inclined to give of themselves to each and every visiting customer, fulfilling their needs as they emerge.

4. Crafting and reinventing wellbeing tourism niches

4.1. Introduction

Attempting to brand and sell the Nordic countries as a wellbeing destination is hardly sufficient to create economic success and viable development in regions that depend on tourism. Continuous destination product development is essential to maintain attractiveness and competitiveness. If unique selling points are to link with higher level customer needs fulfilment, a stream of new products, new delivery methods, new marketing strategies and new organizational forms will be critical.

Nordic tourism is characterized by many small enterprises, not least in areas of interest for nature-based wellbeing tourism (Hall, Müller & Saarinen, 2009; Hjalager et al., 2008). In addition, in the extreme north seasonal fluctuations are prevalent (Nordin & Svensson, 2007) and price levels are high. Nevertheless, Nordic tourism has provided radical new tourism products, a most successful recent example being the icehotel concept now found in several locations and expanding in scope and scale (Hjalager et al., 2008). This section analyses how tourism enterprises under these harsh circumstances can develop competitive products and services in the field of wellbeing.

4.2. Innovations in the laboratory areas

An innovative product or service is something that is new to the customer and/or for the producer or service provider in a particular context, and thus an innovation does not need to relate to ground-breaking changes. An innovation might be radical in the sense that it changes the nature of the product and how it is produced, or it might be incremental, changing only smaller details, although many small amendments may add up to considerable transformations (Hjalager, 2010). The studies in the laboratory areas demonstrate a clear willingness and ability to perform innovative processes from the initial idea to implementation. Below we provide some illustrative examples of four interrelated aspects:

- 1) core product/service innovations related to wellness traditions
- 2) product diversifications which expand the notion of wellbeing
- 3) technological innovation and new methods of providing services
- 4) institutional innovations.

Core product and service innovations. Not surprisingly, there is a wholehearted focus on developing new products and services that meet customers' most critical needs and expectations. Much innovation in tourism is customer and market driven (Hall & Williams, 2008), and activities in the laboratory areas decidedly confirm this tendency.

What could be identified as service offerings from the laboratory areas is presented below. The offerings detailed show the variety of approaches and topics, all close to the spa and wellness traditions, where water is essential, and which entail a strong element of relaxation and pampering. It is demonstrated that some innovations concern minor issues and details, which may, nonetheless, be of importance for the product and encompass learning values for others who work with product development in wellbeing tourism.

Case – focus on the water qualities. The Mývatn Nature Baths (MNB) were founded upon the steam that comes from the ground. Traditionally locals had made use of the hot water and

steam for bathing especially in one particular spot named after the activity: Hotspring bathing hills (*Jarðbaðshólar*). In 1996 a couple of local entrepreneurs decided to revitalise the tradition and put up a fibre-plastic facility over one of the steam crevices in Jarðbaðshólar. Thus they created a natural steam bath, and as the steam results from a magma heated surface and groundwater, it is relatively odour-free as opposed to the often distinct H₂S smell of geothermal water. The steam bath became an immediate success with locals and word spread among tourists in the region. With growing demand the idea of developing good service facilities was born. Two years later a limited holdings company (Mývatn Bathing Company Ltd) was set up around the idea and six years thereafter, in spring 2004, the present facility was erected and opened to visitors. This facility is only partly built around the old natural steam bath. The centrepiece of the facility is a blue thermal pool with water provided from the National Power Company's nearby energy facility. There boreholes provide steam that propels turbines and generate electricity for local industry, but thereafter the steam is led directly to the pool. This surplus water had been released at the roadside of ring-road number 1 going through the area and was attracting a considerable tourism bathing crowd, furthering demand for facilities to be built. Analysing the marketing strategies of the MNB the relation this facility has to wellness tourism can only be tentatively established. Under the general terms of rest and relaxation, the MNB advertises that one should come there to relax and soak in the hot water in beautiful surroundings, an escape from it all in that sense. The marketing focus is not on wellness, but is simply about providing a needed service (bathing), the traditional way. There was a need for an all year round recreation facility in the area and the customers were there already. As this form of bathing is traditional, and locals can get reasonably priced season tickets, their good-will and co-operation was ensured. Apart from a stunning setting in natural environments, the facilities at Mývatn are extremely unsophisticated and not subjects of any concerted innovative endeavour.

Case – local ingredients. Anttolanhovi Spa is situated on the shore of Lake Saimaa in Finland and it provides hotel, restaurant and rehabilitation services. A distinct concept is the 'wellness bar' (following the idea of minibar), found in all villas. The bars are filled with Finnish wellness and wellbeing cosmetic products from Lumene and Cutrin (both labels owned by LUMENE Oy). The intention is to give customers a chance to pamper themselves. Skincare products come from Lumene and hair care products from Cutrin. All the products are manufactured in Finland. In addition to the wellness bars, it is possible for customers to buy all these products from the Anttolanhovi shop. Lumene was the first cosmetic business that combined berry oils in cosmetic products. The main raw materials of their products are cloudberry, blackcurrant, cranberry, blueberry, lingonberry, birch, heather and peat. All the raw materials are gathered from arctic areas – the plants and berries used accumulate nutrients and vitamins during the short and intensive growing period. Studies have shown that arctic berries are rich in antioxidants, vitamins and essential fatty acids (omegas). Lumene wants their products to include at least 80 percent natural ingredients. The firm is also cooperating with The Finnish Association for Nature Conservation, and the Allergy and Asthma Federation, which is a non-profit public health organization. Cutrin's products are designed especially for Nordic hair types and contain similar Nordic ingredients as do the Lumene products. The customer feedback on the wellness bars and their high quality products has been very positive. The manager of Anttolanhovi hotel declares that the products of Lumene and Cutrin support the whole business concept of Anttolanhovi. The co-operation started when the hotel manager had a meeting in the Lumene factory and got a positive reception for the wellness bar idea. After presenting the idea to Lumene, she received a suggestion from Lumene about the products that could fit into the wellness bar. At the moment, the co-operation can be observed on the spot in Anttolanhovi as an active example of co-branding.

Case – Copperhill's Spa & Health Club. The spa facility of Copperhill Mountain Lodge Åre (Sweden) is designed to soothe all senses. Like many spas, it is a place for relaxation and contemplation, to regain one's zest for life with new energy and inspiration. However, the culture of the indigenous Samí people has been the inspiration for their spa concept,

introducing Nature's four elements: 1) *Earth/Plants* - The SPA is built in rustic and genuine natural materials. The colour scheme is earthy, dominated by locally sourced wood and rock, like pine and slate. The treatment rooms are designed like Samí tepees, where the visitor can relax with the scent of birch oil and the sounds of traditional Sami music “yoik”. All spa products are by the Swedish Kerstin Florian, based on natural resources including thermal mineral water, mud, algae, herbal extracts and essential oils. 2) *Water* - Water brings life. "Hot springs" with still water both outdoors and indoors are being built as part of the spa. 3) *Fire* - The new spa will have an open fireplace, representing warmth and love, relaxing and soothing. 4) *Sun* - Natural light and sunshine is flooding through panoramic windows. Visitors can also step right outside of the sauna to have a snow roll, or relax in the new outdoor hot spring, with views of Mount Åreskutan. Open air, vast expanses and the sense of freedom are thought to characterize the experience.

Case – New water fitness activities as a part of wellbeing products. The Finnish Institute of Aquatics, located in Jyväskylä region, is developing new water activities and equipment for water activities. The institute is also in charge of educating fitness instructors for various water sport activities such as water running (with a water running belt), using submerged trampolines, and aerobics and training in water. These training and aerobic forms are AquaBailamos, AquaBoxing, AquaTrim, AquaArmyInterval, AquaHappyFeeling, AquaKickRock, AquaJogging, AquaLineDance, AquaAttack, AquaCapoeira, AquaFunk, AquaDisco, AquaHarmony and AquaPilates. New equipment to support exercising in water has also been developed. For instance, prototypes of swimming exercise equipment are lent to indoor swimming pool facilities in Finland for test use, and users and physical education instructors are asked to give feedback on them. The institute also launched a competition for customers and asked what kind of exercises one can do with the product. This resulted in many new ways to use the product and also a few suggestions for improvement. The product was slightly modified following some of the suggestions.

Product diversifications. Taking into account the Maslow pyramid addressed earlier in this report the diversification and expansion of the wellbeing product seems essential. The laboratory areas have in various ways addressed the opportunities in this respect, and some examples are given below. The product diversifications aim at attracting new customer groups, and prolonging the visits or the seasons. In addition, and very importantly, the diversifications enhance the experience.

Case - Enhanced and coordinated marketing. In eastern Finland there is an effort to challenge the very passive stance of wellness and to promote the customer's more active role in her/his own wellbeing. The facilities are already in place, but need coordination and joint marketing. A concept is based on six fundamental pillars: 1) Spirit, mind and self development: relaxing excursions in the forest and lacustrine environment, 2) Health: Nordic walking around the lake shores or through forests, traditional and preventative treatments, 3) Healthy cuisine: local raw materials and clear water fish, 4) Inner and outer beauty: Finnish sauna, peat sauna treatment, 5) Relaxation and comfort: swimming in the lake, the Finnish sauna experience, baths in a hot water barrel, relaxation by an open fire, and 6) Tailor-made, movement/fitness: guided tours in and on the lake, kick sledding or trip skating on the ice of the lake. However, in eastern Finland there are already packaged services and products connected to the wider theme and content of Lake Wellness.

Case – treetop wellbeing. One working group in the Danish laboratory area elaborated and tested a wellbeing concept for families. The main assumption was that children (and their parents) spend too much time at computers, and are alienated from interacting with nature for the benefit of body and mind. The 4-day wellbeing package teaches a group to live in nature, feel the joy of moving in forests, along rivers etc, and reframes the idea of healthy eating. The liberation of the fantasy from the restriction of electronic media is a key element, and the families get tools to continue a healthier lifestyle and to enjoy the social relationships with

each other to a greater extent. The planning group, which consisted of personnel at a sports centre and two hotels, tried to invent and implement new accommodation forms for this category of tourists, namely spectacular and exciting tree-top houses. Making buildings, however primitive, raises discussions with the authorities in charge of nature conservation, and is a challenge to accommodate both sustainability and tourism experiences.

Case – Zip Line Åre. Åre has developed the largest zipline park in Europe. Zipline is a ropeway where visitors are strapped in on a harness, swishing above the beautiful nature of Åreskutan and its wild terrain. It provides the participant with a feeling of flying. The participant is elevated 60 metres above the ground and the line is several hundred meters long, reaching speeds of up to 70 km/h. Included in the Zipline is an Ecotour. The meaning of Ecotour is that the guides share their knowledge on the environment, flora and fauna and history of Åre. Hence the Zipline offers a combination of excitement and beautiful scenery. Zipline was Åre's first outdoor activity to be open all year around.

Case – sauna seen from outside. The Sauna From Finland included ideas about the development of entire sauna villages or a sauna museum. In addition, companies in the area are interested in using the Sauna From Finland concept in order to find new target markets for their products and new business activities focused around the sauna theme. Sauna is already a theme for local festivals and competitions in Finland, but the tourism element and the interpretation of the habits are not yet well developed.

Case –Totalskidskolan in Rödskullen, Åre. The Swedish non-profit organization Totalskidskolan is in itself not new, but quite unusual and its base in Åre has developed recently. Totalskidskolan is a ski school that welcomes all skiers with a permanent disability - visual, physical, severe, complex or learning. The premiss is that skiing is for everyone. Anyone who has the interest will be provided with the opportunity to experience the speed, snow, mountain environment, joy and excitement of skiing. The organization arranges kids' ski camps, youth weeks and ski school weekdays during the winter season. Equipment participant needs do not affect the price. The price paid is the cost that other visitors to Åre pay for their ski school and equipment hire. Totalskidskolan subsidizes the costs. The methods and philosophy have been an inspiration to many other destinations worldwide.

Case – bonding components better. The Beito Experiment was concerned with transforming a traditional cross country skitour into a wellbeing product. "Skitouring" is a typical Nordic activity engaging a large proportion of the population in snow rich areas primarily in Sweden, Finland and Norway. Research reveals skitouring as a significant health activity. Development of this activity has taken place over the years in terms of more user friendly equipment (e.g. ski, poles, textiles and outfit). However, the core activity or product – the physical component – is pretty much the same as it was 100 years ago. The Beito Experiment tests to what extent a traditional cross country ski tour can be turned into a wellness product. The transformation should be done by looking at the cross country ski tour as the core element but adding the following three typically wellness elements: Nutrition, mental relaxation and spa/body massage. The selection of these three elements was done through a process of expert interviews and workshops. A test group consisted of 6 people aged 50+ and typical cross country tourists. A product package consisting of various typical wellness elements seemed to complement the traditional cross country tour. In the packaging process the segmentation of the market is of great concern.

Technological innovation and new methods of providing services. Process innovation includes the introduction of new technologies that can lead to more rational service provision and/or new services. Enterprises in the laboratory areas work on this. However, these facilities are mainly in the development or test phases, but already attract significant interest.

Case – Wellbeing technology. In Jyväskylä region, a technology business called FirstBeat is providing products and services for monitoring health and wellbeing. FirstBeat cooperates with the Finnish heart rate monitor manufacturer Suunto. With the help of the software it is possible to assess physical workload, daily stress and recovery, health promoting effects of physical activity, effectiveness of fitness training, and energy expenditure and weight management. The stress monitoring has also been tested in tourism settings in Jyväskylä.

Case – smart-phones for fitness guiding: Advanced technologies are moving rapidly into sports, leisure and rehabilitation. In wellbeing tourism implementation is still fairly modest. However, new forms are under consideration. In the Danish laboratory area there has been some focus on the rehabilitation need for patients who have been under medical treatment, for example knee or hip surgery. Training is necessary to regain fitness, and pleasant environments can increase the efficiency and dedication. The persons under rehabilitation could well use trails in nature or facilities in wellness centres, closely monitored by the most modern technological remedies. Technology can assist in communication with medical staff. In addition, technological remedies can empower the users and provide them with a better understanding and control over their rehabilitation. Specifically, smart-phones are frameworks for many new applications that help and motivate the patients. However, the professional medical dimension, and back-up organization has to be planned and implemented locally.

Case - “Sensing” accommodation. The villas of Vuokatin Aateli are situated in Vuokatti tourism destination in eastern Finland. Vuokatin Aateli concentrates on offering high quality accommodation in villas and apartments. The company has altogether over 20 villas ranging from 21 to 200 square metres. The company is using latest technology in their luxury villas. This includes carbon dioxide measuring in order to automatically modify the air-conditioning of different rooms to keep the oxygen level optimal for guests. Apartments and villas are also monitored remotely. The manager, located elsewhere can help if the customer has problems with some equipment. In addition, the system will alert management if a guest has forgotten to turn off the water before leaving or if a window has been left open in winter. Such systems help the proprietor to monitor the quality and keep the accommodations in good shape for future guests.

Case – “Tracking the visitors”. In the destination of Åre technology has been used to access information on tourists’ movements both in the winter season, but also to find out more about the people visiting the traditional ski resort in the snow free seasons. GPS technology was used to find out where the visitors spent their time. The study also aimed at developing new concepts and products with input from customers.

Institutional innovations. Institutional innovations are about creating new modes of collaboration and setting up organizations and procedures not hitherto seen. The aim of institutional innovation is to reap benefits (economic, in terms of visitors, in spin-off effects etc.) which could not be harvested by single stakeholders acting alone. Institutional innovations are often about bridging sectoral barriers or linking mental frameworks and pooling resources in new ways.

Case – The concept of sauna: Networking and co-operation between different industries. The Sauna from Finland concept aims to create new types of business activity in Finland, and to profile Central Finland as the Sauna Province. Sauna from Finland started as a network but the co-operation strengthened between the different actors to a level which led to the setting up of an association around the concept. The goal of the association is to promote Finnish sauna culture, support the development of services connected to sauna and support and inspire new entrepreneurial activities. The concept aims at bringing together actors from different business sectors (e.g. the sauna industry, tourism, wellness/wellbeing, service sector) to create new types of business activity. The founders of the Sauna from Finland Association are Design Forum Finland (www.designforum.fi), Diges ry (www.diges.info), Harvia (www.harvia.fi), Jykes

(www.jykes.fi), MARK (www.mark.fi) and SunSauna (www.sunsauna.fi). Stakeholders in the area mentioned the sauna manufacturers and their important role in interviews when they were talking about the area as sauna region. For instance, the sauna stove manufacturer Harvia has its production facilities in the area. The interviews demonstrated that the concept of Sauna from Finland can be a supporting factor in manufactured product development processes. In general, the importance of product development was emphasized, and in addition to sauna products water activity services were mentioned.

Case – work-related services. Work stress is a very serious problem for many employees and as a consequence also for their employers. Combatting the problem by providing new and very attractive services is an idea in the portfolio of the Danish laboratory area. Professionals in stress handling claim that it is necessary to create a complete “time-out”, away from home and everyday tasks and obligations. Many accommodation facilities are ready to offer premises away from home. However, to appear as a wellbeing product, it also includes a coordinated and flexible selection of stress therapies and life coaching, gentle forms of exercise in natural surroundings, and healthy food. Personal services, such as therapy, are expensive, and many people do not feel that they can afford an extensive wellbeing break, no matter how much they need it. Price is a crucial issue. Therefore the actors in the laboratory area attempt to collaborate with insurance companies, large workplaces and public authorities.

Case - cosmeceuticals. The Comwell Hotel Chain has 17 hotels in Denmark and Sweden, 3 of which offer extensive spa facilities. In 2009 the chain was involved with a producer of skincare products, and the result is a series of 8 products: body lotion, body oil, body cleansing foam etc. Natural ingredients include avocado and hibiscus extracts. The collaborative partner is Matas, a retail chain of more than 200 shops in Denmark and Sweden. The products have been given a signature name: Spalosophy, and they are used in the treatments in Comwell spas. The products are also sold in all hotels in the chain and in the Matas shops. It is claimed to be very important that Matas matches Comwell in terms of geographical coverage and in the perceived quality level and yet to be affordable. It is particularly emphasized that the products do not contain phthalates, parabens or any allergy provoking perfumes, which seems to be in line with Matas’ image as a retail chain for all Danes, popular for “no nonsense”, honesty and reasonable prices. The product series is featured on Comwell’s website, where Matas is also mentioned. The Comwell name appears on the bottles, but on Matas’ website there is no direct link to the hotel chain. When launching the spa series in 2009, the chain’s press unit mentioned the spaoffers, with the spa personnel prominently present in the shops, where they demonstrated the products. Comwell CEO was astonished at the rapid success of this initiative. Jointly, the partners had estimated a sale of 5,000 units during the first three months of introduction, but the products sold 75,000 units in the spas and Matas shops. They found it to be a “splendid marketing” initiative. Comwell has mounted a follow-up initiative by publishing a small handbook entitled “Spa at home”, which describes simple processes to continue to enjoy the spa experiences after having visited a Comwell facility. The handbook is also part of the marketing of Comwell and Matas’ cosmeceuticals. Attention to the potential of cosmeceuticals has increased as a consequence of the collaboration. Comwell would welcome an expansion of the Spalosophy series and an increased use of Danish ingredients.

Case – The Vision 2011 group in Åre. A long process of informal meetings with the most influential (self-appointed) actors in the destination resulted in the Vision 2011 strategy, stating where the destination was heading and what it aimed at becoming. The Vision 2011 constellation is a rather untraditional way of organizing public-private cooperation at a destination. Focusing on the role of local government, it is even more remarkable. For a democratic organization, it is unusual to be part of this kind of informal and yet very influential group where no formal records are kept, clearly lacking democracy and showing little transparency. The public actors’ part of the Vision 2011 group have approached a manner of organizing and working that appears to be more readily accepted and common among private actors. The boundary between the public and the private sectors also appears to be

increasingly blurred with regard to policymaking and in particular to destination embracing initiatives and strategies. One example of this is when the local government decided to financially support the establishment of the arena, event and congress hall at Holiday Club with SEK 50 million (5.3 million EUR), which was naturally criticized because it could affect, for instance, more traditional public investments in schools and health care. The local government also provided land and infrastructure. It is clear that a project of this size could hardly have been successfully carried out without this kind of joint approach and unusual effort on behalf of the local government. In a sense this form of destination governance can be described as process innovation. The public-private interplay with its informal yet highly influential character, with certain known rules of the game and an exchange of resources, such as information and knowledge to negotiate shared purposes and come up with a shared view of the future certainly has innovative elements and structures. It was also essential to the successful development of various wellbeing concepts in the shoulder seasons.

4.3. Areas of future crafting and re-invention

The work in the laboratory areas generally shows considerable creative power and ability. The stakeholders are mostly inclined to innovate, and they are ready to collaborate with others to achieve results. However, taking into account the customers' needs and profiles and the characteristics of the unique selling points in the Nordic countries, there are still areas of interest for future developments. The interviews in the laboratory areas point to the following innovation challenges:

Developing wellbeing concepts for children. Children are the future consumers of wellness and wellbeing. Their interest in the wellbeing concepts must be kindled early. At the same time their approach to "body and mind" is different, and the product needs complete changes and remodelling with active elements and collaboration with parents and relationship building with others.

Re-inventing local wellbeing traditions. The sauna tradition, cross country skiing and bathing in hot springs and lakes are examples of traditions that have been translated into genuine tourism wellbeing products. Other traditions can be considered as possibilities for developments. Reinvention does not necessarily mean exact copying. In most cases it is necessary to develop further to accommodate the practical performance, to create an aura and interest for the phenomena, and to ensure business opportunities for those who provide the services.

Stimulating curiosity and learning needs. Some tourists are not looking for pampering alone, they want to understand the destination and its characteristics better. There are requirements to explain e.g. through websites, brochures, books, TV programmes and smart-phone applications about the specificity of the wellbeing service offer, highlighting the fact that storytelling must be embedded in the human resource approaches. As shown earlier, some of the Nordic lived values are very unspecific and their practice is tacit. There is thus a need for translation into work practice and behaviour for the formal and informal hosts.

Integrating products from nature in to the experience more intensively. There is a long list of herbs and plants which could be used more intensively in wellness treatments, and the list of food products is also very extensive, although research in ethno-botany is lacking in the Nordic countries. More profoundly, vast wilderness areas and non-anthropogenic landscape vistas can facilitate a sense of wholeness and oneness with nature so important to many urban dwellers today. Furthermore, nature provides building materials, and materials for a range of designer gifts and home decoration. The experience of wellbeing takes place through the consumption, for example, of

treatments or food, and the interpretation of Nordic values can also be attached to the local products.

Product diversification in traditional wellness facilities. Many facilities are focused on traditional wellness, for example, the hotel spas and the thermal baths. For them it is crucial to expand the offering. Cooperation with actors outside can enhance wellbeing in nature, for example on horseback, on skis, on walking or guided nature interpretation tours. The products might also be widened to more therapeutically and semi-medical specialities. The borders of individual service offerings and destinations in general are blurring, and this is a challenge and an opportunity for product development.

Mapping and marketing wellbeing resources through the Nordic landscapes. Wellbeing trails can be a product organization that combines many resources: spots for silence, places of spiritual power, areas with health-giving plants, locations offering opportunities for various forms of physical activity, and of course the traditional commercial offerings such as spas, accommodation and healthy food restaurants.

Enhancing the medically related offers. Population ageing leads to increasing demand of wellness products and services with certified medical profiles. The Nordic countries enjoy a high standard in medical services which are widely available to Nordic citizens as part of the benefits of the welfare state. There tends to be a very rigid separation between wellbeing and welfare services. It is a challenge to create new understanding of scientifically tested and approved wellbeing measures that enhance the effects of medical services or serve as preventive measures.

Boosting the use of technology for all purposes. Labour is the most costly element in the production of tourism services and experiences in the Nordic countries. There is a great incentive for enterprises to increase productivity by all available means. The use of technologies for all purposes is essential. Backstage technologies, such as IT in booking, management, communication and control is crucial, but increasingly, technologies go hand in hand with improved services. Thus, Smartphone and iPad applications help users of the wellbeing services with access to supplementary information. These and other devices also enhance the core wellbeing products, for example by providing personally adapted continuous measurement and treatment of health related data. Tailored wellbeing programmes and schedules are emerging. Increased collaboration between IT producers and health and tourism actors can promote further development with wider economic benefits.

Creating wellbeing events. The possibilities of inventing exiting, entertaining and interesting events in relation to wellbeing have hardly reached a viable level. Health and wellness exhibitions may, for example bring out both touristic products and other types of products and services. Festivals can focus on healthy food and eating. Hands-on events having to do with cosmetics and cosmeceuticals attract both children and adults and may attract new user groups. Competitions can activate larger groups, for example in terms of weight-loss programmes. Further, in terms of learning, courses, seminars and workshops can be organized. These, linking up with transcendence motives, could lead to other types of events with the aim of binding social relations to local areas and populations. There is generally a need to develop the ideas, management and enhancement of wellbeing events.

Enhancing the ethos. Ethos refers to Nordic traditions and lived values, and the behavioural and interpretative codex in Nordic society. There is a need for the tourism enterprises and actors to be outspoken on what is important. Ways in which the Nordic defined ethos can be incorporated to boost the unique selling points of the Nordic countries needs greater emphasis.

The areas of future crafting and reinventions mentioned above are characterized by a strong focus on the Nordic preconditions and particular strengths and opportunities. Thus, competitiveness will hardly be achieved by merely emulating wellness and wellbeing observed in other countries, such as otherwise well-known and highly professional Alpine wellness and wellbeing tourism products (Smith & Puczkó, 2009; Pechlaner & Fischer, 2006). The Nordic approach will benefit from choosing another direction.

5. Policies for the development of Nordic wellbeing tourism

5.1. Introduction

The previous chapters have focused on consumers, marketing/branding and product innovation issues of *Nordic Wellbeing* tourism. It can be affirmed that the Nordic area contains numerous prospects in this field, potentially considerably more than what is presently ascertained by local actors and tourists, and more than is presently exploited by business operators. It was also observed that the products need (re)invention, and that in this process there are many arguments for the creative differentiation of the *Nordic Wellbeing* product compared to what is tradition in other countries, particularly in central Europe. Accordingly, the Nordic element should not be a replica of existing wellbeing service offerings; there are wider perspectives.

The private sector is the main actor in the development of tourism destinations. Hotels, holiday centres, providers of health services (e.g. gym owners), tourist guides and operators, catering specialists, sellers and renters of equipment, transportation companies, and many others are crucial for the development of products in wellbeing tourism. Any re-invention of the concepts and strategies also has to rely on creative capacities and on the willingness to invest. However, as this section will show, there is also a quest for policy interventions in order to support, direct and enhance private driving forces (Hall, 2008).

The aims for a public course of action are several. Ensuring growth of employment, economic results and competitiveness of tourism services are priorities for most national and regional bodies. However, as Nordic wellbeing tourism is so intensively set in natural environments ensuring sustainability is also crucial. Sustainability in this context is understood as entailing not only the conservation of nature, but also the access of the local population to resources that are essential for their welfare and wellbeing (Dwyer & Edwards, 2010).

In practice, three categories of publicly initiated interventions can be identified that promote the reinvention of wellbeing tourism in the Nordic countries:

- 1) Embedding in and coordination with other policies
- 2) Promotion of resource based collaboration in local contexts
- 3) New branding and marketing models.

In the following these categories of interventions will be outlined and examples provided from the Nordic laboratory areas.

5.2. Embedding in and coordination with other policies

Environmental, health, labour, and planning policies along with agricultural/forest policies are areas of touristic value which would benefit from strategic coordination.

Nordic Wellbeing tourism is obviously particularly dependent on the availability and quality of natural resources. Nature is the single most important factor. What makes *Nordic Wellbeing* tourism attractive is the opportunity to enhance physical, social and mental wellness intertwined with

outdoor facilities. The careful management of nature and making its resources available and accessible is essential. Environmental policies are therefore a focus of interest for the development of wellbeing tourism.

Case – trails and routes. Trail planning worldwide has become an instrument in the hands of the authorities. Trails provide routes to attractions, through areas of interest. Particularly vulnerable areas can be shielded from unnecessary traffic. Using GPS map co-ordinates for application in smart-phones is the next step for implementing environmentally sensitive trailing in the region of Southern Denmark. Similar initiatives are planned in the Vaasa region in Finland.

Case – coordination with geothermal energy provision. The Mývatn bathing facility is only partly built around the old natural steam bath and the water in the pool comes from the National Power Company's nearby energy facility where boreholes provide steam that drives turbines and heats water which eventually ends up in a lagoon. The facility is erected as part of the National Power Company's policy of environmental and social sustainability which partly funded the limited holding company of the MNB.

Case – limit the number of guests? In Åre, leading actors have glanced at the destination of Whistler, Canada, and their way of ensuring sustainable development. In Whistler, the authorities have decided to limit the number of guests at the destination to keep it attractive in the future. Hence, unsustainable growth is avoided, and the aim is rather to offer quality products today as well as tomorrow. Issues in relation to the environment and to long-term sustainability are presently top of the agenda in Åre.

Case – Conservation, preservation and development. Within the laboratory area of Vaasa there are at least three different attitudes to how the World Heritage Site Kvarken should be developed, if at all. The environmental policies applied to the area are not accepted by locals, who claim that they know best how to take care of sustainable development. The environmental policies, which favour conservation and preservation, have also met with resistance from the energy sector. There is probably no other area in Finland where the number of prospective windmill parks is equally high. The field of policies in the area has acquired a new dimension. Environmental policies and tourism policies have to get along with energy policies now, and more interests have to be merged. The Vaasa example illustrates the complex and competing interests even within a sustainability agenda.

Tourism interests usually coexist in a delicate balance with other human interests, such as residential development and recreational use, and various extractive activities, such as forestry, mining and fishing. The cases demonstrate a Nordic concern for the coordination between industry sectors. Promotion of wellbeing tourism requires e.g. accessibility and conservation at the same time. Trail making as a protective measure is the most viable and feasible but not the only one (Briedenhann & Wickens, 2004). Land use policies are essential supplementary measures (Pechlaner, Herntrei & Kofi, 2009). Figure 2 illustrates the motivation factors entrenched in the facilities, but also their interpretation. Visitors do not necessarily know about the potential benefits for their wellbeing unless informed and guided.

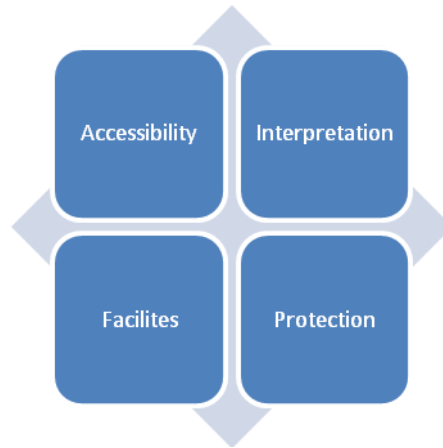


Figure 2: Policy areas combining environmental policies with those of wellbeing.

Labour policies. The workforce in the Nordic countries is quite expensive, mainly in order to finance the public sector through taxes. Wellbeing facilities find it difficult to ensure feasible staffing, and they have to work both on increasing productivity and developing service quality through enhanced staff qualifications. There are no indications that labour costs are about to decrease, and in a Nordic context it is necessary to address these in new, synergetic ways. Here governmental initiatives at all levels may have an influence in terms of assisting through creative collaboration with private entrepreneurs in the wellbeing sector to remain competitive.

Case – widened operational tasks for wellbeing employees. Vejle Fjord rehabilitation center in Southern Denmark employs well qualified staff with certified vocational and further training. In order to ensure stable employment throughout the seasons, Vejle Fjord staff also works with the production of “private label” spa products. Thus, the labour strategy employed in Vejle Fjord is (partly) a creative reflection of the Danish labour market and educational policies.

Case – self-service in wellbeing. Regional and national funds, provided in Finland and in Denmark for example, are increasingly being allocated to technological lighthouse projects that enhance the availability of wellbeing related information and gadgets on the Internet and on smart-phones. Innovative facilities remove the necessity for extensive staffed advisory and information units.



Figure 3: Policy areas combining labour policies with those of wellbeing.

Labour market policies which emphasise the health and wellbeing of employees can also be welcomed as market opportunities for private and public wellbeing facilities. Usually, services ordered as part of workplace wellbeing are more lucrative for providers than services purchased by private individuals. For this reason many wellbeing facilities seek collaboration with municipal health departments, insurance companies or the HR departments of large enterprises.

Case - Workplace health promotion. In Finland there are programmes aiming at coping better in work life. Workplace health promotion courses are traditionally held in rehabilitation centres and holiday centres. New solutions have also been developed to enhance employee wellbeing. One example is a system developed by AinoActive. The programme they offer is carried out as close as possible to an employee's normal living and working location, because in many cases this is a crucial success factor when the goal is permanent results. The programme has six phases: 1) Health screening, 2) Monitoring, 3) Learning, 4) Interactive training, 5) Outpatient health rehabilitation programme, and 6) Reporting. The programme is also developed together with rehabilitation centres and some of the centres are using the system to support their core activities. The overall aim is to influence employees' lifestyle by supporting healthy lifestyle.

Planning policies. Can government proficiency in the field of planning and building be transformed into opportunities for the wellbeing sector? Some of the cases and laboratory areas illustrate the importance of a coordinated planning, building and design policy for wellbeing facilities to gain a special profile and reputation for being Nordic.

Case – public baths. Finland has a long tradition of public baths, and the oldest facilities still are in use. These institutions, located in historic buildings, have preserved their charm through strict regulations and building policies. The buildings are listed as sites of architectural heritage. The atmosphere of these public baths has for many decades been a source of wellbeing for locals and tourists.

Case – saving energy. Traditional wellness and spa facilities are often very energy consuming. The geothermal facilities have extraordinary opportunities and this is a showcase, but other facilities have to rely on other energy resources. A Danish scheme called “Intelligent Square Meters” caused Hvidbjerg Spa and Wellness to invest in earth heating – pipes under the neighbouring parking lot ensures a supply of heating, and the place is claimed to be carbon neutral.

Case – protection of historical wellness heritage. The Comwell Hotel and Spa company in Denmark is located in a converted hospital building. It is a beautiful early 20th century building, and much has been done – due to planning requirements – to ensure the protection of the building's heritage and qualities. The references to the previous health related use of the building are not unimportant in the promotion of the offers.

Figure 4 below illustrates that the values for wellbeing tourism can be affected by planning regulations and building codes. There is considerable scope for collaboration and development of the image of Nordic design and architecture.

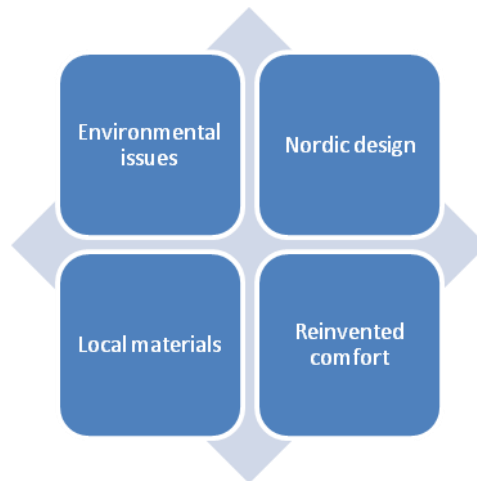


Figure 4: Planning policy and health and wellness.

Health policies. In the Nordic countries the health sector is dominated by public providers. The majority of the health services and rehabilitation are delivered, controlled and/or financed by national or regional authorities. As shown by Müller & Lanz Kaufmann (2001) and Hjalager (2005) there is often a separation and lack of mutual recognition between the official health services and privately and commercially provided offers of wellbeing. The studies in the laboratory areas demonstrate some bridging of these gaps that potentially indicate the way a Nordic scientifically consolidated wellbeing profile could develop.

Case - Beitostølen private sector provided, highly professional health services. Beitostølen is beyond doubt the best known destination in Norway with a kind of health image. This position emerges from the existence for 40 years of the remarkable Health Sports Centre. The Health Sports Centre is formally a private entity but operated mainly on the basis of public health budgets. The institution is a centre for research, education and treatment. The health image imported to the Beitostølen brand by the Health Sports Centre has been actively strengthened by Beitostølen Resort with their spa facilities and various events and programmes targeted at guests with health problems (for instance asthmatics). There is a strong and positive relation between The Health Sports Centre and Beitostølen Resort within the field of health and wellness production based on private sector arrangements. The trails specially groomed for guests with physical handicaps are at the disposal of other wellness guests, too. This certainly goes the other way around as slopes and trails provided by Beitostølen Resort are available for rehabilitation purposes at The Health Sports Centre. However, there is no particular public financial support specifically targeted at wellness production, neither for investment nor for operations. The privately operated wellness offerings at Beitostølen have not been eligible for financial support from the public health service although in rhetoric the value of wellness offerings in a health context is to some extent recognised by politicians.

Case – youth health encouraged. The Vejle area (Denmark) provides maps of trails which not only describe routes and sights, but also show options for physical training. The installing of fitness equipment at selected locations adds to the diversity of the area as a place for wellness and wellbeing. Some routes, areas and facilities are dedicated specifically to children, the result of a municipal effort to prevent obesity and other lifestyle related deceases among pupils in the local schools. These facilities are also entirely available to tourists and other categories of users than local schoolchildren.

Case – smokefree at Mývatn. In the Icelandic case the medical establishment has not been directly involved in the development of wellbeing tourism or destinations. In recent years a

dialogue has been opened up between the health authorities and private entrepreneurs on developing health and wellness tourism. For this purpose a health and wellness association was recently formed under the auspices of the Ministry of Industry and the Icelandic Tourist Board, with the Ministry of Health involved. In the case of the laboratory area, ideas for a treatment centre in relations to the MNB have been promoted but are not coming to fruition. Nonetheless in terms of medical or health-care tourism in the region what seems to be occurring in terms of successful build-up are health care and preventive initiatives in collaboration with NGOs. In this respect the health care clinic in the region has been instrumental in planning walking and running events to benefit charities promoting trails in the region and its environment, but also in promoting health awareness amongst those participating. The reason why these are in the Mývatn region is the place itself and the fact that these events all end in the MNB. In addition, the local health clinic has been instrumental in setting up and maintaining a hotline for smokers wanting to quit. These tentative linkages of the public health administration and destination activities have sustained ideas about the formal incorporation of public health into health and wellness destination development in the Mývatn region.

Case - accessibility in destinations. In Finland several businesses and areas have participated in infrastructure development processes aiming to improve accessibility in tourism destinations and businesses. For example, the Finnish Forest and Park Service has designated some of the nature destinations as suitable for people with special needs (e.g. paths with wheelchair access). Businesses offering wellbeing services are also paying more attention to accessibility in their facilities. They have considered that when people get older it might bring challenges e.g. to move around in the spa area. This has led to improvements in the structures and designing them with consideration for different target groups.

Figure 5 shows some of the elements of coordinated health and wellbeing policies. It is not likely that in a Nordic context there will be an amalgamation of the traditional health sector and the tourism related wellbeing phenomenon, yet there are several ways to facilitate positive spill-overs. A driving force is the fact that lifestyle diseases are a threat to the feasibility of the publicly financed health services, and therefore a wider perspective on health is required.



Figure 5: Public health policy and health and wellness tourism.

Food and agriculture policies. Internationally and in the Nordic context, food is becoming an important element in the concept of wellbeing tourism. The culinary experience is added to the

traditional wellness and wellbeing services, and the design and composition of meals stress to the tourists the holistic dimensions of health and beauty. Many providers of health and wellness increase the emphasis on local foods, claiming that the food goes hand in hand with climatic and cultural wellbeing factors (Tikkanen, 2007). The environmental issue of “food miles” is also raised.

For the three EU Member States (Denmark, Sweden and Finland), the EU agricultural policy is decisive in terms of farmers’ preferred production (Hjalager & Antonioli, 2000). The EU has been widely and consistently criticized for providing incentives for monoculture, which is largely contrary to the ideas of cultural food heritage and multifaceted and locally based wellbeing. In more recent years, both EU agricultural policies and national initiatives have modified earlier policy concepts, and altogether the farmers and local agents seem to be keen on exploring the opportunities for diversifications. Some government bodies provide incentives for farmers who want to set up experiments with new crops and husbandry. In the two non EU states, Iceland and Norway, heavy government subsidies are paid for food and agriculture, most often combined with regional policy initiatives.

Case – food in stress therapy. Work related stress is often connected with unhealthy eating habits: too much sugar, coffee, alcohol and fast food. Actors in Region of Southern Denmark work with the development of comprehensive de-stressing with therapy, activities and food. The food ingredient consists, for example, of slow-food cooking classes. The initiative has started a collaboration with a mill producing a range of organic flours, mueslis etc.

Case – lake trout and hot spring bread. Part and parcel of experiencing the nature of the Mývatn region in Iceland is sampling the products of nature. Therefore, smoked and cured lake trout is almost the staple at the hotels and guesthouses, often served with rye bread baked in earth ovens, making clear the link with the place’s abundant geo-thermal energy. Facilitating access, the harnessing and harvesting of these resources are generous subsidies to farmers and support for developing alternative means of sustenance in times of fiscal decline for traditional agriculture. The “Food from the Farm” initiative of the government is only one of these support mechanisms, being translated into a component in the wellbeing service provision, by some of the tourism entrepreneurs in the region.

Case – I want to know. Ingredients used in cooking have long been a standard question. What is new is the request for a presentation of the supply chain for different raw materials. Tourists to Iceland want to know where, when, how and who caught the fish on the plate. Storytelling and certification in relation to food are being enhanced, but new formats still need to be developed to capture interest and be credible.

Case - Learning how to prepare healthy food at Beitostølen. Within the wellness offerings at Beitostølen, the Resort has built specific kitchen facilities in order to accommodate groups of guests who under professional guidance want to experience how to prepare healthy food. The initiative goes along with a general Norwegian emphasis on food production. Thus, for example the biological growth processes of certain vegetables lead to a higher vitamin content. The living conditions of game and livestock are also essential in an overall narrative of Norwegian food production and food preparation.

Case – Branding locally produced food. The County of Jämtland in Sweden has a strong tradition and large production of locally processed food. This is the region within the European Union with the greatest number of organic producers. The production is based on traditional processes and includes hundreds of manufacturers within all kinds of food processing. The best known may be cheese processing, often based on goat’s milk, but also various bakeries, charcuteries such as smoked, cured or otherwise preserved meat – reindeer, elk and other venison, fish and game. There are many producers of jams, juices and other berry products. In

Åre, the Åre Chocolate Factory and the Åre Bakery are among the best-known. These locally produced products are served by the various hotels and restaurants in the county as well as in the destination, adding to the feeling of uniqueness related to this place, but also to the local cultural experience. The local production is in many ways, not least financially, supported by the public sector.

As noted in Figure 6, governmental actions in the field of agricultural policies can affect the framework for wellbeing tourism. Attention has to be drawn to the potentially negative effects for tourism of the rigid policy measures that have hitherto been in place.

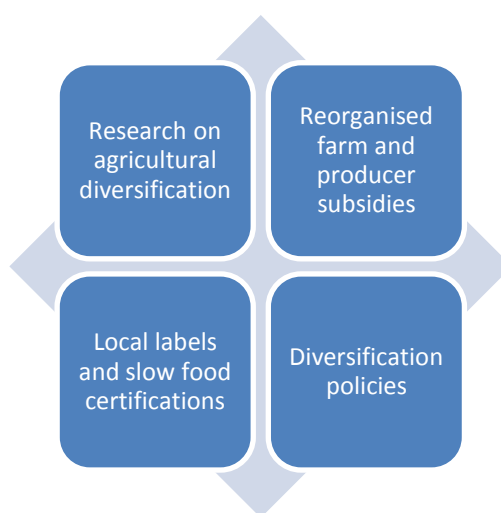


Figure 6: Agricultural policies benefitting health and wellness tourism development

5.3. Promotion of resource activation

As illustrated above, the development of comprehensive wellbeing tourism depends to some extent on appropriate policy frameworks. However, the actions in the laboratory areas also suggest that entrepreneurial zeal is essential in order to make things happen. Nordic laboratory areas represent quite different collaborative modes. This section illustrates that there is not one single efficient way of promoting resource utilization, but several.

The Nordic countries can be seen as a set of resources at destination level. A destination product is formulated from different attributes and elements. In this report a destination product is seen to contain destination environments, service infrastructure and tourist destination experiences (Murphy, Pritchard & Smith, 2000). Destination environments contain natural features, economic factors, culture, political/legal frameworks, technological assets, and social factors. Service infrastructure includes recreation and attraction services, food services, travel services, shopping services, transportation services and accommodation services. A tourist destination experience is formed through a combination of these resources (Figure 7).

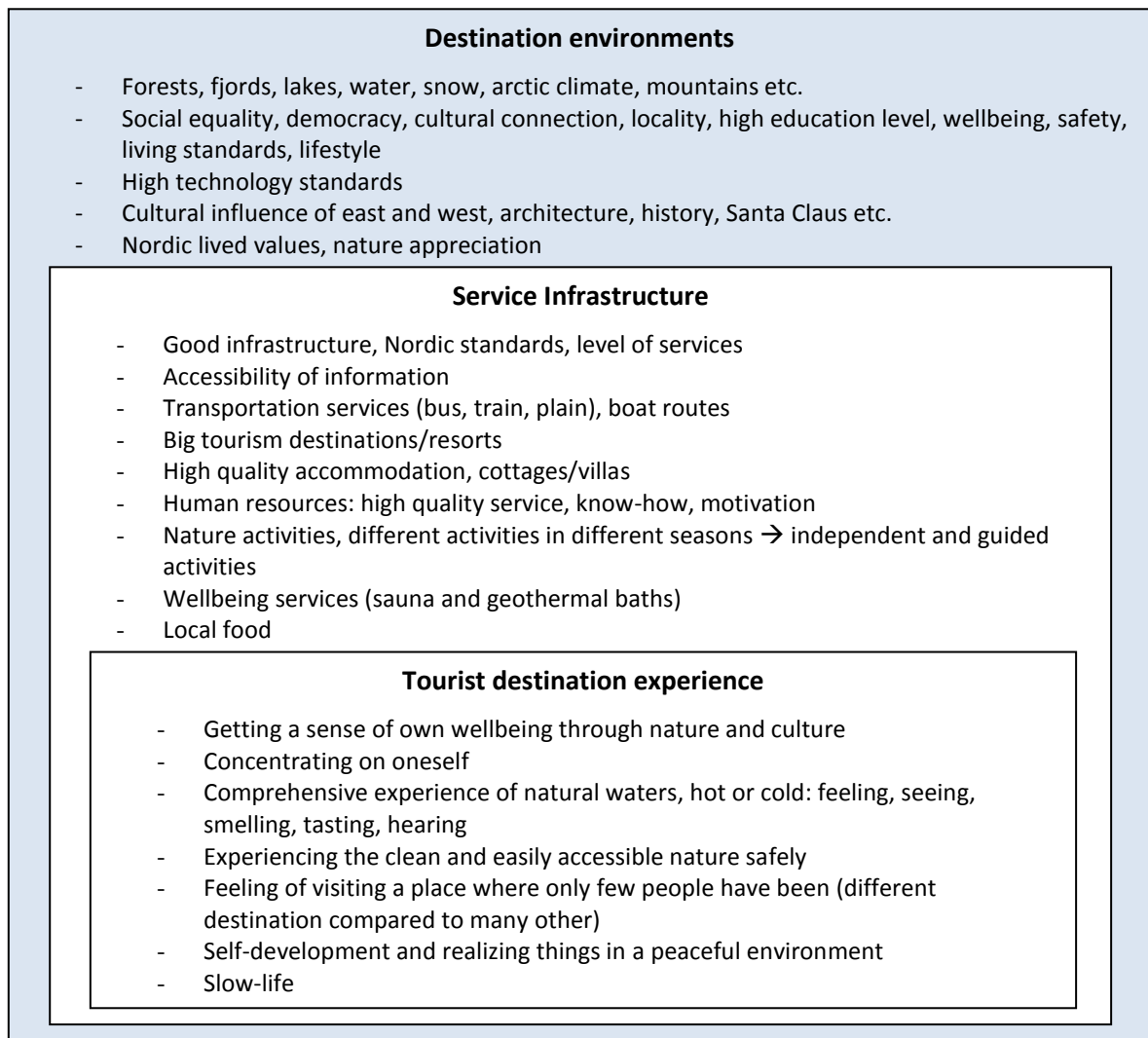


Figure 7: A conceptual model of the destination product (Konu, 2010b, framework adapted from Murphy, Pritchard & Smith, 2000, 46).

Collaborative southern Denmark bottom-up approach with many stakeholders. A productive strategy process has been initiated which brings together diverse groups of actors from the wellness industry and beyond. Altogether around 100 stakeholders have been involved over a period of 2 years, under the guidance of the Destination Marketing Organisation VisitVejle. The process has increased transparency, enhanced knowledge formation and motivated collaborative relations, and it has resulted in the launch of six specific initiatives, found to attract commitment and commercial interest. The bottom-up process has been valuable for the participants, but there are many structural divides in the field, particularly between the public and private sectors, traditional and alternative health services, small and large enterprises, commercial and voluntary actors. The importance of building bridges can be clearly seen from the process, where this aim persists.

The Åre corporate strategy. The tourism product is well established in Åre, and the actors are continuously working on extending the seasons, which has been found to be crucial for continuous viability and so far has been quite successful. A long process of informal meetings with the most influential actors in the destination first resulted in the Vision 2011 strategy, stating where the destination was heading and what it aimed to become. This was followed by a more broadly anchored destination development and branding process, looking further ahead at to 2020. Vision

2020 has the overall ambition to turn Åre into “The most attractive European alpine all year destination” through the development of three main areas: 1. Unique experiences all year round. 2. Concern for the environment. 3. A borderless welcoming Åre.

The Beitostølen resort demonstrates a simple core vision “Four exciting seasons”. Wellbeing and health tourism selling points are expanded as part of a year round operating cycle. Beitostølen resort is the large and dominant operator at Beitostølen Destination. The quasi-monopoly makes it simpler to facilitate and rigidly pursue a strategy than in destinations with many actors. The wellbeing brand of Beitostølen is furthermore supported by the four big sports events every year: Beitosprinten (National start of the cross country season in Norway), Fjellmaraton (The toughest marathon competition in the world – 2000 participants), Villmannen (Triathlon and Cross Country World Cup Opening). In addition the world biggest ski competition for disabled “Ridderrennt” is staged. Voluntary support of the local population is crucial for the success of these events. About one third of the population of the municipality participates. The accumulated learning and competence in the voluntary sector is a significant facilitator for innovation in big events at Beitostølen. Many key contributors of ideas and competence in carrying out events have been among the professionals employed at the Health Sports Centre.

Marketing the Mývatn region. The region is mainly promoted by big industrial stakeholders. These are the hotels, especially hotel Reynihlíð and Sel hotel at Skútustaðir, both owned and operated by locals. The manager of hotel Reynihlíð is among the main entrepreneurs setting up the Mývatn Nature Baths and chairs the board. It needs to be borne in mind that the region is predominantly a farming region with a total population in 2010 of 391. One big factory operating near the village of Reykjahlíð was opened in 1967, and in many ways formed the basic sustenance of the village and its *raison d’être*. This factory used geothermal steam to dry diatomite earth, mined from the lake bed. This factory was closed in 2004 and it can be fairly stated that the closure prompted growing interest in tourism, but at that time, in 2004, just over 162,000 visitors were coming to the region. Apart from the main entrepreneurs of the region, the region’s DMO is manifest in the tourism association in the region where tourism stakeholders and business entrepreneurs meet regularly to discuss matters of common interest. This forum has no real say in the development of the destination and has often been subjected to the rule of those running the biggest companies. The municipality plays a limited role in the development of the destination with no clear vision for the future of tourism in the region and is mostly involved in fighting the government for planning and building permits, but the region is a designated protected area of outstanding natural beauty.

Vuokatti in Finland is adopting a mixed strategy of collaboration and entrepreneurship. In Vuokatti the role of the marketing organization is very dominant. The shared brand of “Versatile Vuokatti” is well known in Finland and the purple colour in the logo is well recognized. The marketing cooperation seems to work fairly well in the area, even though some smaller businesses have stated that they do not have necessarily too much to say in the process compared to bigger companies in the area. It is evident that the common marketing actions also knit actors better together and thus balance the competitiveness in the region. The collaboration functions best in marketing, while at the moment the product development processes and transforming the local resources into tourism products is mainly undertaken by individual businesses. However, the importance of strategic networks is recognized when e.g. information about customer needs are mapped to support the development process.

Jyväskylä - Three individual tourism networks. The tourism functions in Jyväskylä region are quite scattered around the area. The area is rather big, and there are three identified tourism networks active in the area. One functions in Jyväskylä and concentrates on organizing congresses and events.

Another operates in Himos area and is a designated winter activity network. Finally, the network in Peurunka provides various tourism services all year round. Peurunka is also seen as a potential wellbeing destination. In development processes the role of development organizations in the region is fairly strong. These organizations coordinate different R&D projects in the area and work closely with businesses. One aim in the region is to connect the competences and selling points of other industries to the tourism sector and integrate these with saleable and packaged products. However, at the moment the resource activation is rather fragmentary.

Vaasa actors are presently aiming at re-defining tourism services. A majority of the tourism firms in the laboratory area of Vaasa are small (micro) and seasonal. Their primary goal is, and has always been, to make their visitors (guests) feel good and satisfied. This basic marketing logic seems to have gained another dimension in terms of customer wellbeing. There is today an intensified focus on wellbeing as a concept among the entrepreneurs. It is not so much about adding new services to their range of offerings, but to re-define existing services to better fit the wellbeing trend. The destination environment is water and the archipelago, as well as local nature and culture. The service infrastructure is good, but could be improved. The ferry service to Sweden especially could be improved. However, this is not the most critical aspect for wellbeing tourism development in the region. The lack of a well organized wellbeing tourism network is more critical for further development.

Table 4 recapitulates the scope for comprehensive destination planning and the pros and cons in terms of commitment of stakeholders. As can be seen from the table the laboratory areas are generally in a continuous development process. However, the laboratory areas differ in terms of structures of influence and competence. While the Åre area has scale and scope advantages, most of the other areas struggle to create a critical mass. For this, the involvement of a multitude of actors is essential. The table also suggests that this is a difficult and long-lasting process, where compromises have constantly to be made, in order to activate resources in the possession of a range of public and private actors.

The laboratory areas are willing to widen their perspective to a Nordic one. However, the development process so far hardly allows the luxury of seeing beyond the borders of the region yet. The actors are struggling to create a workable understanding of their own resources, images and potentials, a process that takes time, not least in areas where the involvement takes place “bottom-up”. Thus the promotion of a wider Nordic wellbeing image receives some interest, but the resources currently available to the laboratory areas are not sufficient to set up and maintain a combined effort. For that purpose new institutional and conceptual structures will be required, as explained in the next section of this chapter.

Table 4: Resource activation.

	<i>Southern Denmark</i>	<i>Åre</i>	<i>Mývatn</i>	<i>Jyväskylä region</i>	<i>Vuokatti region</i>	<i>Vaasa region</i>	<i>Beitostolen</i>
Resource activation (collaborative, corporate, entrepreneurial)	Collaborative	Public-private partnership	Entrepreneurial	Mixed: collaborative & corporate	Mixed	Entrepreneurial	Mixed: collaborative & corporate
Transparency	High, everything communicated to the stakeholders	Low, unless you are part of the vision strategy group	Low, one dominant entrepreneur and lack of trust	Medium	Medium	Medium	Medium
Commitment	Varied over time, depending on assessment of benefits	High within the strategy group. Varied in the destination as a whole.	Great on behalf of each entrepreneur to their project	Varied, depending on assessment of benefits	Varied, depending on assessment of benefits	Varied, there is a heterogeneous set of companies involved	High – aiming at building wellness offerings and brand over time. Both public and private.
Speed of implementation	Highest among larger stakeholders	Generally high on agreed issues	High for those that have reached a critical mass in terms of wealth and power	Wavering, in many cases the role of developers rather strong compared to businesses	High among private enterprises	Slow at the moment due to concept obscurity	Financial constraints slow down implementation
Competences	Inclusive, integrative	Varied. A highly professional actor in Skistar.	Low – no sustained engagement exists with the terms of product development – it is mostly done following the arrival of demand	Competence in development processes, utilizing local know-how	High in marketing, product development among leading actors	Medium, the entrepreneurs are very skilful but coordination is still lacking	High in marketing and product development
Free-riding	Extensive , many SMEs involved, but free-riding is accepted	Some	Extensive, but almost all free ride on the acclaimed natural attraction of the area	Unknown	Some	Unknown	Not serious
Key attraction	Natural sights and resources.	Mount Åreskutan	Nature and the geothermal energy	Lakes, fairs, events	Skiing slopes, hills, nature	Nature and the archipelago	Nature and spa
Public / private driving	Public in close	Partnership	Private	Public	Private and public	Private and public	Main private

forces	alliance mainly with larger wellness providers						with public support to some extent
Collaboration	Open and inviting, all are welcome	Good in the strategy group	Limited	Good between different industries	Good in terms of marketing activities	Limited	Good
Nordic links	None		None	Some	None	Unknown	None
Meaning of health and wellness	Nature and traditional wellness	Outdoor activities, nature, clean air and water, space and silence	Water and nature	Technology, new kinds of water activities	Outdoor activities	Seaside and outdoor activities	Outdoor activity and traditional spa
Needs of destination	Supplementary, innovative products and services		Investment and qualified staff	Developing a clearer profile as a tourism destination	New investors	Concept definition, coordinating actor and venture capital	Investment support

5.4. New branding and marketing models

What does it require to invent and brand a wellbeing tourism destination? Is it at all possible to create a reputation from a collection of small and large service providers in regions with a fairly diverse composite tourism offer to become a place distinctly recognized for a wellbeing profile?

“Symbolic actions” are defined by Anholt (2005) as particular substances or structures that happen to have an intrinsic communicative power, something “suggestive, remarkable, memorable, picturesque, newsworthy, topical, poetic, touching, surprising or dramatic.”(p. 3). When branding places and/or a region, the symbols are enacted in memorable one-liner slogans or in logos. Ensuring a durable image with this form of symbolic action requires not only an ability to find the quintessence of myriads of messages, but also a strong organization to execute it (Pike, 2004, 2010). Symbolic action is, however, something far more intrinsic and related to the picture of a country or a region that the media is addressing and circulating, without the full control of actors in the nation or region.

When looking at the Nordic countries, the unique selling points have fairly weak suggestive power as they are quite diffuse. It is not possible immediately to identify symbolic actions that can form a joint point of reference for Nordic branding. Nature is the most obvious uniting factor, and yet not specific enough to differentiate the Nordic countries from other destinations around the world. The combination with Nordic lived values could provide for some fruitful avenues.

Progressing towards a clearer image and a *Nordic Wellbeing* brand is, at best, a long term process that will involve the suppliers as well as other branding and marketing associations in the Nordic countries. As shown by Therkelsen & Gram (2010) transnational branding is difficult and often hampered by incompatible interests and agonies.

In principle, there are four modes of modern (nation) branding and marketing. Figure 8 below shows a strategic communication grid. The intensity of the marketing effort is illustrated on the vertical axis (Y). The intensity of the marketing effort is a factor of the size of the target group and the duration/frequency of influence. The horizontal axis (X) indicates the recipients’ - the tourists’ - willingness and inclination to ‘respond’ and ‘co-produce’. The X axis illustrates the recipients’ interest in being influenced by the communicated messages as well as their interest in taking an active part in living these messages out.

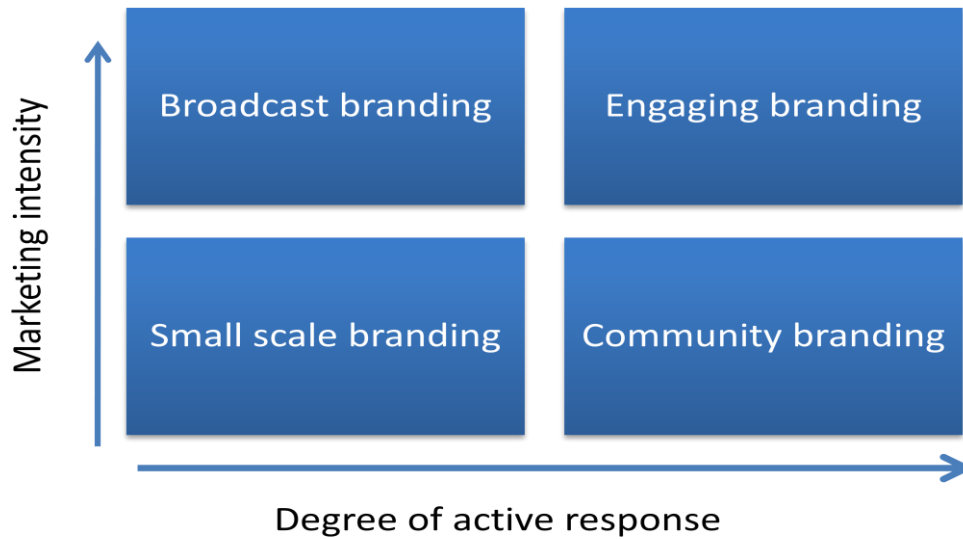


Figure 8: Modes of branding and marketing

The four fields of Figure 8 indicate four essentially different communication and branding strategies. These strategies might all be legitimate - but in different situations and contexts.

Box 1: Small scale branding:

In this box we find activities which are not particularly aggressively communicated or do not attract any notable attention. Nor is it something which occupies the recipients' minds in ways that keeps them talking positively about it, and their reputation ranges little beyond the near geographical area. Many wellbeing facilities possess no special attributes, and their customers take little active role in the promotion of them.

Example: Small scale service providers – small scale marketing. Many of the providers of wellbeing tourism are entrepreneurial businesses with a strong local attachment. Therapists, cafes and restaurants, providers of sports equipments, guides etc tend to focus their communication locally, if they are not members of larger collaborative communication networks.

Box 2: Broadcasted branding

All initiatives and projects wish for recurring prime time/front page exposure in the (electronic) media. This illustrates how important the media is, if the aim is to reach a large audience. But the wider written press is also of interest in this context. The measure used in Box 2 also includes advertising and other forms of commercial promotion and public relations.

Example: The wellbeing in the South Ostrobothnia project represents a classic broadcast branding approach. Local actors come together, identify a set of unique selling points, and develop a website to attract visitors to the destination.

Example: Iceland, in a frantic effort to convey the message that the island was a safe destination to visit, employed social media strategies to broadcast a tailored image of the country's nature and its people, with web-cams placed around the country to show that life goes on in spite of the Eyjafjallajökull volcano eruption in spring 2010. The *Inspired by Iceland* marketing campaign is taken to task by Benediktsson, Lund & Huijbens (2010), but is an example of the broadcast notion of branding.

Box 3: Community branding

A personal awareness of and experience with a nation tends to increase the positive view of it. The more personal relations established between Nordic inhabitants and tourists, the better the image will become. As indicated in Figure 8 community branding will typically deal directly with people, who in return may be more committed for a longer period of time. Recently, social media, if employed from person to person have added an entire new dimension to the idea of community branding.

Example: Near Jyväskylä region in Finland the Ecovillage of Keuruu is to be found. The village has, of course, permanent inhabitants offering different training courses and accommodation possibilities. People interested in environmental issues and sustainable lifestyles are the main target group. In addition, it is possible to go to the village as a volunteer. The visitors take part in village's daily activities such as farming. The village community aims to create a self-sustaining local economy. The goal is to enhance the know-how and bring forth the idea that it is possible to create practical solutions by exploring alternative ways of living. On the websites (see: <http://www.keuruunekokyla.fi/en/visit.html>) it is stated: "In Ecovillage you can... get to know the community and how it functions by participating in our daily life... enjoy the silence and beauty of the Finnish nature by walking, hiking, biking, cross-country skiing... bath in a lakeside sauna... do traditional farm work in the garden, kitchen, in the forest and in renovating houses...learn new skills and make new friends... relax, share & philosophize, meditate, enjoy life and nourishing vegetarian meals...".

Box 4: Engaging branding

This box is still somehow theoretical. The crux of the matter is the effort to position the Nordic countries more clearly and with a sharper focus on value based and meaningful content in the social media, which have an increasing importance as 'opinion makers' and function as pivotal points for image creation. This is an augmented – broadcast - "word of mouth".

Example: Again the marketing strategy named *Inspired by Iceland* serves as an example. The strategy followed earlier attempts to establish the islands nation brand, i.e. a brand with focus on the inhabitants and their culture, as opposed to the well established country brand of Iceland as a place to experience nature. Through the homepage of the *Inspired by Iceland* marketing strategy people are invited to listen to people telling their stories of encounters on the island and post their ideas and travel suggestions, initiating a string of debates or addressing an ongoing one, which will then engage the traveller in the marketing and branding of the nation.

Example: The personal story of a sports star. In 1962 the visionary blind entrepreneur Erling Stordahl settled at Beitostølen. In 1964 he invented in cooperation with King Olav of Norway the "Ridderrennet" – today a world famous ski competition for the blind. In 1970 Erling Stordahl introduced the Beitostølen Health Sport Centre (for physical medicine and rehabilitation) and managed the institution for the next 24 years. Today the institution is a centre for research and education on treatment of physical health and one of the fundamental values of the brand of Beitostølen. The community of blind people is strong, and this is an example of an engaging branding, although the electronic media still play a fairly limited role in the communication.

No doubt promotion and branding apply to the entire toolbox, although probably still with an emphasis on the lower left part of the grid. Box 4 of Figure 8 is crucial, but still adapted to a limited

extent. To secure a greater overall impact in a longer perspective, the challenge is to move *Nordic Wellbeing* initiatives and projects upwards and to the right in the strategic communication grid. In the Nordic context this means engaging people with the terms of wellbeing, health and wellness in the Nordic context, but for this to be achieved the message needs to be clear. A combination of nature and lived Nordic values is the avenue we propose to be developed addressing policy implications in each field outlined in Chapter 5.2.

6. Towards a Nordic wellbeing tourism policy and practice

What can be deduced from this report is that the concept and marketing of Nordic Wellbeing is not being deployed to any extent in the destinations that were studied during this research. Notwithstanding, elements of what might constitute Nordic Wellbeing have been identified, and there exists an awareness of Nordic Values. This has been tentatively addressed in both the local context, through the laboratory areas, and a policy context, through exploring different implications, if official policy was to take into account the development of tourism wellbeing products with the focus on unique Nordic resources.

In this final chapter, we shall outline and discuss the possibilities for a Nordic approach to wellbeing tourism, focusing on stakeholder collaboration in terms of marketing and innovation. Nonetheless a genuine and determined joint venture for marketing Nordic wellbeing will be a matter of a long term strategy and expanding networks of collaboration, and this is not likely to come about swiftly. This chapter will contribute to the building of a stronger mutuality across the Nordic countries, and it will suggest measures that can be enforced by local, national and trans-national actors in the field. In particular by the Nordic Innovation Centre, which is a key player in the continuous enhanced collaboration of tourism. Below the reader will hopefully find ideas for the pursuing tourism innovation in the wellbeing theme.

The chapter raises eight pillars of specific policy intents and interventions, some of which are related to product development potentials. These revolve around harvesting the benefits of unique selling points, developing new or adapted sports and leisure activities, integrating food producers, creating new markets through developing cosmetics and medicines, addressing lifestyle diseases, emphasising spirituality, enhancing infrastructure and creating international media attention.

1. Harvesting the benefits of the unique selling points

The most obvious assets of the Nordic countries are the sparsely populated, vast open spaces, clean air and water, the light, the wilderness and the local culture, which afford visitors opportunities to seek health and wellbeing through a variety of means. However, the Nordic nature is diverse and complex, and what constitutes something that can be termed Nordic wellbeing landscapes and cultures remains contested.

- *Creating opportunities for viewing and gazing at landscapes void of human habitation from a relaxed setting.*
- *Creating paths and routes through landscapes that allow for active engagement with landscapes either through physical exercise and/or more leisurely activity.*
- *Developing landscape and nature related storytelling that can transcend the national and local marketing efforts and inspire other innovative product developments. Storytelling lines are not exclusively about the beauties of the landscapes but also about the human interactions with it and the embedded cultural notions.*

2. Developing new, adapted sports and leisure activities

The Nordic spaces offer the chance for outdoor recreation of all types, which can both entail strenuous individual exercise or simply all round fun for all the family of all ages and abilities, catering to the social aspects of wellbeing. The former can provide for further product development linkages to sports utility companies, planning and trail development *in situ* and the development of

facilities that allow for relaxation and body monitoring afterwards. The latter includes the development of cultural offerings and entertainment which may highlight local culture and heritage in the process of facilitating togetherness in a relaxed non-consumptive environment. The Nordic tourism sector has over the years demonstrated an ability to invent and re-invent facilities that cater for the tourists demand for experiences. In particular, cross country skiing being is an internationally acknowledged Nordic health and wellbeing activity that deserves to be more strongly promoted as such, and as wellbeing product be expanded and diversified by adopting classic wellness offerings. Overall, there are areas where further development can be promoted:

- *Working with the ski destinations to find new snow related activities and markets and develop products applicable to all four seasons.*
- *Create and develop products and experiences related to the unique nature.*
- *Working on turning the cultural heritage into attractive products without compromising the genuine.*
- *Developing products addressing safety issues and body monitoring with advanced methods and technologies, e.g. using GPS devices with pulse meters.*
- *Developing concepts for Nordic border-crossing wellbeing trails for physical exercise and related social and cultural experiences.*
- *Developing sites where activities and exercise can be undertaken simultaneously by a range of age groups.*
- *Developing new practices by combining workplace/occupational health services with tourism services innovative ways.*

3. Widening the food link

Nordic food has been prominent on the agenda, and the branding of the countries for their innovativeness in this field is remarkable. The link backwards in the value chain is still modest, and linkages to the landscapes and natural resources unexploited. The spaces are rich in resources that can be used for additional and more sophisticated alternative food supplies. These resources need to be further explored and their potency established as well as their traditional uses, so as to engage them in tourism product development processes.

- *Supporting existing successful food initiatives to further investigate and develop the landscape and natural resource dimension. Food from the earth, making these backward linkages explicit.*
- *Setting up ethno-botany and biology research in order to establish further uses of Nordic flora and fauna for local healthy food.*
- *Supporting the food miles and slow food agendas with a wellbeing element.*
- *Creating frameworks for food labelling that include a Nordic dimension.*
- *Supporting the development of food signature products for each region.*

4. Signature products of medicine and cosmeceuticals

Further to the research on ethno-botany to be undertaken in the Nordic context is the added benefit of identifying products for alternative medicine and bodily care. These are already being developed from herbs and minerals found in the Nordic environment, but research focusing on ethno-botany and ethno-biology could further enhance this and create linkages with the region's culture and traditions. Signature products have a role in the experience of wellbeing, but also in terms of marketing of the Nordic area.

- *Encouraging new research on Nordic ethno-biology and botany.*
- *Ensuring an alignment with the highest medical standards.*
- *Encouraging entrepreneurship in the fields of medicine and cosmeceuticals and offering collaboration with the public health sector where feasible.*
- *Encouraging co-operation between different industries e.g. in tourism and cosmetic sector.*

5. Addressing lifestyle diseases with wellbeing

The Nordic countries have in common that health service provision is in the hands of central and local government. Health-care and medical treatments are publicly funded and widely available although contested in an ageing society. Over time, the medical establishment has been suspicious of all forms of alternative medicine. With the burgeoning problem of lifestyle related diseases a shift in focus on behalf of the authorities seems to be under way. Synergies need to be created with those offering wellbeing services catering to people's need to balance their lifestyles in harmony with their perceived wellbeing. Therein are the fundamental opportunities to develop a Nordic wellbeing concept that can be beneficial for tourism enterprises. Thus, engaging notions of Nordic professionalism, quality of life and Nordic nature in branding exercises is crucial.

- *Coordinating initiatives in community health with tourism wellbeing.*
- *Advancing user-driven innovation where locals are involved in the development of attractive wellbeing facilities.*
- *Launching collaborative platforms between health professionals and tourism entrepreneurs on a local, national and trans-national level, e.g. the Nordic.*
- *Introducing professional medical service components to existing wellbeing facilities, tackling e.g. specific life-style related problems.*

6. Spritualising the experience

These vast open spaces and the wilderness allow ample opportunity for spiritual fulfilment and reconnection with nature which constitutes for many a welcome break from the alienation from nature suffered in everyday urban lives. These spaces need to be developed with an explicit reference to the qualities of nature as affording a sense of oneness and plenitude. These qualities should be an integral part of health and wellness product development.

- *Innovating the concepts of "healing places" and "therapeutic landscapes" that include Nordic climatic and geological particularities.*
- *Investigating people's spiritual relation to the landscapes and dimensions balancing lifestyles with the rhythms of nature.*
- *Creating spaces allowing for the development of inner comfort, relaxation and peace set in a non-consumptive environment.*

7. Supporting the Nordic infrastructures

Outdoor activities are prevalent in Nordic wellbeing and the products developed for Nordic wellbeing tourism. This places demands on built environment, infrastructure, design and architecture. This strand of development can go hand in hand with the most modern technologies. Hitherto the importance of quality in building infrastructures has been underestimated in Nordic wellbeing tourism.

- *Underscoring the traditions for considerate urban and landscape planning and regulation for the purpose of making the best of the connectivity between nature and human settlement.*
- *Developing buildings and infrastructure towards sustainability, balancing the needs of the environment and people thus catering to people's environmental awareness.*
- *Awarding good architectural and design achievements, including both aesthetic and technological solutions.*

8. Raising international media attention

After the emergence of social media, the framework for marketing has changed dramatically, but in as yet unforeseeable ways. Customers of tourism services in general and wellbeing services in particular are members of communities that through the power of social media and the Internet have a wholly different geographical dimension than communities relying on personal day-to-day physical interaction. Much as in traditional communities, the most powerful medium on the Internet is the word of someone known and/or trusted. The quality and success of Nordic wellbeing destinations is best publicised through the mouths of satisfied customers. Nordic wellbeing destinations should thus create opportunities for a wellbeing community to develop online through social media in order to advertise their success.

- *Exploring health related community formations and the appropriateness for dialogue oriented towards new communications from Nordic niche wellbeing products.*
- *Setting up a template for social media marketing addressing the issues of wellbeing and health outlined above.*

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Annex 1

Output from the Nordic Wellbeing project

Country reports:

- Konu, H., Tuohino, A. & Björk, P. (2010). Wellbeing tourism in Finland: perspectives from three case areas.
- Hjalager, A.M. (2010). The invention of a Danish wellbeing tourism region: strategy, substance, structure, and symbolic action.
- Huijbens, E.H. (2010). Iceland country report. The Mývatn Region as a possible Nordic wellbeing destination. Akureyri: Icelandic Tourism Research Centre
- Nordin, S. (2010). Nordic Wellbeing as a Means of Tackling the Seasonality Issue.
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- Björk, P., Konu, H. & Tuohino, A. (2011). NORDIC WELLBEING – VAASA REGION: Regional report. Report of Nordic Wellbeing -project. University of Eastern Finland, Centre for Tourism Studies.
- Paija, J. & Konu, H. (2011). Nordic Wellbeing Customer Research Report. University of Eastern Finland, Centre for Tourism Studies.
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Wellbeing Innovation Cases on INNOTOUR.com:

- Hvidbjerg Strand Camping – the use of design and architecture as an element in the wellness department
- Total Ski School - innovation for people with disability
- Self service spa pampering
- Mandø Soap. Working with local products in the Wadden Sea
- Leisure maps in the Vejle area. Fit for fitness
- Exploiting geothermal waters for wellness tourism
- Using new technology behind scenes – "Sensing" accommodation
- Developing Sauna From Finland concept: Networking and co-operation between different industries
- SaunaLab – artistic and scientific development of the Finnish sauna concept
- Dilemmas in gourmet innovation for ski enthusiasts

Articles in academic journals:

- Björk, P. (forthcoming). Brand Recovery: A model for quick fixing when the brand structure collapses (in review with *Journal of Travel and Tourism Marketing*).
- Hjalager, A.-M. (forthcoming). The invention of a Danish wellbeing tourism region: strategy, substance, structure, and symbolic action (accepted for *Journal of Tourism and Hospitality Planning and Development*).
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- Hjalager, A.-M. & Konu, H.: Cosmeceuticals and the co-branding and co-creation in wellness tourism. TTRA Budapest, September 2010.
- Hjalager, A.-M.: Symbolic action in the invention of Nordic Wellbeing tourism. ATLAS annual conference, Cyprus, November 2010.
- Huijbens, E. H.: Natural wellness - Health and wellness as nature-based tourism product. TTRA Budapest, September 2010.
- Huijbens, E.H.: Natural wellness: Introducing agoraphilia. Nordic Symposium, Iceland, September 2010
- Konu, H.: Unique Value Creating Destination Product Attributes of the Nordic Countries - Finnish Perceptions. Transformational Marketing, Academy of Marketing Conference 2010, 6-8 July, Coventry, UK.
- Tuohino, A.: Implementation of a model of a sustainable wellbeing destination – case Savonlinna town. TTRA Budapest, September 2010.
- Konu, H.: Customer's role in wellbeing tourism product development process from experts' point of view. Nordic Symposium, Iceland, September 2010

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- Huijbens, E. (2010). Þróun heilsutengdrar ferðapjónustu á Íslandi – hvað finnst ferðafólki sjálfu. In I. Hannibalsson (Ed.) Rannsóknir í Félagsvísindum XI. Reykjavík: Félagsvísindadeild Háskóla Íslands, pp. 23-31.
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Other academic activities:

TTRA (Travel and Tourism Research Association) 2010 “Health, Wellness and Tourism – healthy tourists, healthy business?” conference 1.9. – 3.9.2010, Budapest, Hungary

- Members of the Scientific Committee: Anja Tuohino and Edward Huijbens



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