

A Feasibility Study for a Yukon Health and Wellness Tourism Industry

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For

*North to Knowledge, Learning Travel Product Club, and
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For centuries the wilderness has been a place of spiritual quest and purification. This awareness crosses cultures and transcends politics. The wilderness is a place where we have to give up the illusion of control, where perspectives shift, and where values change.

It is a powerful crucible of transformation.

- From *Journeys of Discovery and Healing in Canada, Dancing Mountain:*
<http://www.dancingmountain.ca>

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And the many, many, many people who spoke with us about their thoughts, ideas, and visions for a Yukon health and wellness tourism industry: one that will also benefit the health and well being of the territory's residents!

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Summary and highlights

1. The consensus expressed at the 2005 “Canadian Spa Industry Conference and Expo” in Toronto, April 10-12, was that the spa, and health and wellness industry is booming in Canada, and will continue to do so in the foreseeable future (see Appendix 1). This assertion on the industry’s growth potential is in line with statements in this study made by the Canadian Tourism Commission (CTC), and national tourism industry research, which has reported a global and market trend analysis that also predicts a boom in spa, health and wellness vacations.
2. This study has examined the feasibility for establishing a unique “True North” health and wellness tourism (HWT) industry in the Yukon. Following on the industry consensus noted above, this study concludes that the Yukon’s travel industry and the Territory in general should, like many other Canadian, U.S., and international travel destinations, be able to reap the many economic and other social benefits of this tourism phenomenon.
3. The study also concludes that the Yukon is in a favoured position to benefit from the HWT boom because of its already considerable health and wellness infrastructure and tourism “assets,” and because these assets match the public’s growing interest in complementary and alternative health and self-care practices.
4. An overarching theme is that there is a natural alliance between the Yukon’s traditional tourism industry and the territory’s existing and potential health and wellness businesses. Establishing a business alliance strategy could turn the territory into a unique northern health and wellness “Mecca”: it also would build on the Yukon’s abundant wilderness and the many health and wellness resources that already exist.
5. The short-term development strategy for a Yukon HWT industry should focus on coordinating and aligning many traditional tourism products and services with the Yukon’s existing health and wellness industry. In the longer term, the strategy should focus on developing and marketing new resort and destination products that would fully demonstrate the strengths and potential of an alliance between the Yukon’s tourism and health and wellness industries.
6. A definition of health and wellness tourism in the context of the Yukon would center on activities such as learning about self-care and other health and wellness enhancing practices, outdoor pursuits, or lifestyle changing features that would

enable a person to increase their access to information and knowledge, and provide them with an opportunity to take part in experiential learning to enhance their physical, psychological, emotional and spiritual well-being.

7. Today's health and wellness programs are responding to the rapidly growing consumer demands for experiential tourism products that include fitness level improvement; for healthy lifestyle education; for nutritional counselling; for healing; for preventive medicine, and for holistic, naturopathic, alternative or eastern medicinal practices and therapies.
8. Following a brief historical review of the HWT industry worldwide, this study demonstrates that there is a lot of overlap between spa, health and wellness tourism, particularly in terms of their markets and the range of services and products that are offered to clients and visitors. This overlap suggests the range of possible components for a unique Yukon HWT industry. These components would focus on visitors who seek a variety of wellness travel experiences, who are generally healthy to begin with, and who are looking for tourism services and products that will preserve, promote and enhance their overall health and well being.
9. The seven types of spa facilities recognized by the International Spa Association (ISPA) were assessed in this study for their potential applicability to the Yukon. Five categories of spas are identified as having some potential for development either because elements of these kinds of spas already exist, or because there are projects in the planning stages that could be enhanced through the addition of spa-type services and products, including complementary and alternative health services. The spa categories having the most potential for development include: Club spas, Day spas, Destination spas, Mineral spring spas and Resort/Hotel spas.
10. This study indicates that the Yukon could begin building an HWT industry around certain well-established themes, and by capitalizing on the CTC's current promotional efforts and plans. Themes that resonate with the Yukon's environment and tourism structure include activities that are best carried out in serene and authentic wilderness environments, and in historical and heritage settings, or where there is an opportunity to discover the spirituality of Aboriginal cultures. The CTC has been linking these themes to HWT and to Yukon-related activities such as festivals, conferences, "isolated" lodges, as well as retreats and B&B's, in their promotional material.
11. The Yukon is well placed to take advantage of a number of HWT trends that are expected to grow significantly over the next decade. These include; eco-adventure and environmentally friendly spas, wellness retreats, resorts and getaway packages and health and wellness learning programs designed for the incentive and corporate "team building" marketplaces.

12. The HWT industry complements a variety of sport tourism themes and is well placed to work alongside current initiatives already underway in the Yukon in preparation for the 2007 Canada Winter Games and in concert with the “Decade in Sport and Culture” (see Appendix 2).
13. A well-planned Yukon health and wellness tourism industry can provide various benefits to other Yukon economic and public service sectors such as health and education. For example, one of the incidental community benefits of HWT programs and services is that they can contribute to the maintenance and improvement of public health and educational facilities by providing additional sources of revenue to help cover their operating costs, or to be invested in their upgrading or diversifying the types of programming offered.
14. This study identifies the need for further research into many aspects of the HWT industry. For instance, ISPA and the CTC are conducting research in the following areas: psychographic research on spa vacationer motivations, quality and export-ready HWT experiences in Canada, consumer tourism segment cross-over analysis, market research in key foreign markets, and HWT best practices and foreign competition HWT profiles. Additional in-depth studies are required and will be undertaken as per presentations and information disseminated at the recent Canadian Spa Industry Conference in Toronto (by the International Spa Association, the Leading Spas of Canada, and the CTC). Access to this information will greatly benefit the future planning of a Yukon HWT industry.
15. This study’s preliminary inventory of business, government and non-governmental “assets” in the territory indicates that there are sufficient tourism services and health and wellness practitioners already in place to form alliances that could offer a variety of “packaged” HWT-related products and services.
16. The importance of human resources, training and education, business standards and professional certification in the development of the HWT industry has been emphasized throughout this study and by the industry experts who presented at the recent Canadian Spa Industry Conference in Toronto. Indications are that: Canada already has an excellent reputation around the world for its high level of staff training and professionalism; more and more educational institutions, e.g., Canadian colleges, are getting involved in training and educating spa, and health and wellness staff (some of these resources are referred to in this study); the HWT industry needs to present a clear business vision, mission statement and objectives, and promote these as part of their branding campaign, and as an important way of attracting, educating, training and retaining professional health and wellness staff. And, finally, products and services have to be highly client-centered in the increasingly competitive, and very personalized, HWT industry.
17. A number of potential products and services are presented in this study as examples of HWT clusters that could be developed in the short-term. These suggested packages fall under the generic headings of “Spa tourism,” “The

Complementary and Alternative Medicine (CAM) industry,” “Conferences, educational studies, workshops and festivals,” and “Retreats, arts, and health and wellness centres.”

18. This feasibility study concludes by providing a series of core strategies, recommendations and next steps. An important element of the strategy is to have this report reviewed by potential HWT stakeholders. This, in part, will produce feedback on the study, and also will begin engaging and familiarizing potential stakeholders with the attributes of a Yukon HWT. Hopefully, this step also will encourage stakeholders to become involved in the realization of the proposed recommendations and next steps. It is only with their involvement and interest that a dynamic and unique “True North” health and wellness tourism industry will develop in the Yukon.

1. Introduction and rationale

In July 2004, a proposal to support a research study to help determine the feasibility of a Health and Wellness Tourism (HWT) industry in the Yukon was submitted to the Yukon Territorial Government's (YTG), Department of Tourism and Culture, Marketing Branch, and North to Knowledge (N2K) Learning Travel Product Club. It was approved in December 2004.¹

The proposal advocated that the Yukon's existing tourism facilities, tourism operators, and health and wellness service deliverers, could coordinate their efforts and be promoted under an emerging and increasingly important tourism niche market most commonly called "Health and Wellness Tourism." It was further reasoned that tapping into new and expanded markets might require some product reorientation, but could ultimately work with many tourism initiatives already in place to position the Yukon as a unique year-round vacation destination.

Finally, the rationale for this study was based on the idea that existing products and services can be expanded or repositioned through tourism marketing to serve the health and wellness interests of residents and current travellers to the territory. The proposal suggested that these activities could form the foundation of a dynamic HWT industry in the Yukon. As such, this study assumes that Yukon businesses, associations and others who are involved in tourism can take advantage of the rapidly growing "health and wellness" industries. This study will illustrate how the natural alliance between the tourism and wellness industries in the Yukon coincides with the educational, cultural and recreational opportunities already available. It will highlight the natural alliance that can be developed between tourism and wellness oriented activities in the territory.

2. Project objectives

This study explores the potentially excellent prospects for the creation of an impressive portfolio of "wellness vacation packages" and a thriving health and wellness tourism industry in the Yukon Territory.

¹ de la Barre, K. (2004, December). "The feasibility of a Health and Wellness (HWT) Industry in the Yukon: A proposal submitted to the Department of Tourism and Culture, Yukon Territorial Government.

The two main objectives for this study are to, (1) determine the feasibility of a Health and Wellness Tourism (HWT) industry in the Yukon, and (2) make recommendations with regard to programs, projects, products and services that would best serve the Yukon's interests in this growing niche market. A number of more specific objectives related to this study include providing support to the:

- A. Development of a definition of HWT in the Yukon context.
- B. Development of health and wellness tourism products and services that are consistent with market trends, and the capacity of the Yukon to service selected niches within these trends.
- C. Packaging of existing and new Yukon health and wellness tourism products and services.
- D. Sharing of information among individuals, businesses, governments, non-governmental organizations in the tourism and health and wellness sectors, along with other potential stakeholders and interested bodies.

Given the exploratory nature of this study and the fact that spa, health and wellness tourism is an emerging industry in the broader Canadian context, this study will also address a number of related development issues. They include:

- a) A preliminary examination and analysis of the Yukon's existing spa, health and wellness products and services.
- b) A survey of HWT market and consumer product research relevant to the Yukon.
- c) A presentation of typical HWT products and services that illustrate the variety of HWT product clusters and opportunities that can be developed in the Yukon to serve this niche market.

3. Project environment

Current trends towards "health and wellness" in Western society are actively promoting values that emphasize a proactive approach where individuals improve and maintain personal well being through a variety of services and activities. In the words of a recent Canadian Tourism Commission (CTC) advertising campaign, these activities "soothe the soul and invigorate the mind."

- CTC (2004). "You CAN collect memories," p.12. (July).

The Yukon is renowned for its natural beauty and its outstanding wilderness treasures. Yet, like many other parts of Canada, the Yukon has only recently begun to consider developing and promoting new tourism opportunities in emerging niche markets. To date, these emerging markets have included wilderness and adventure tourism, cultural tourism (including First Nations tourism), learning travel, and sport tourism. Important to this study is the fact that all of the aforementioned special interest tourism activities can potentially capture elements that are related to spa, health and wellness tourism.

Alongside the potential crosscutting nature of many existing tourism products with the HWT industry, one of the underlying themes in this study is that there is a natural alliance between the Yukon's traditional tourism industry and the territory's existing and potential health and wellness businesses. This promising, and yet to be explored, opportunity is at the core of this project. Similar alliances are being created with great success in many other parts of Canada, the United States and, indeed, the world.² In the Yukon, the abundant wilderness and the many health and wellness resources currently available could lead to the establishment of an alliance strategy that could turn the territory into a unique Northern health and wellness "Mecca." This study highlights the variety of tourism products and services that already exist or that are emerging and that complement the HWT industry, alongside the substantial number of traditional and alternative health and wellness practitioners in the Yukon. It also considers the strength of the territory's other HWT complementary industries (for instance the cultural industry³). See Appendix 3 for two destinations that are aligning health and wellness with the natural environment and positioning themselves as "healing destinations."

In the short term, a strategy for developing a Yukon HWT could involve developing and coordinating a plan to align many traditional tourism products with the territory's existing health and wellness industry. In the longer term, a strategy could focus on developing and marketing new resort and destination products that would fully demonstrate the strengths and potential of an alliance between the tourism, health and wellness industries. By promoting this natural alliance, and by attaching tourism to the accomplishment of a wide variety of wellness goals, many organizations and businesses involved in Yukon tourism can begin to benefit from the surging national and international interest in healthy living and wellness.

4. Defining health and wellness tourism

² Florida, Arkansas and Hawaii (United States) are developing strategies to expand their tourism offerings by linking and developing coalitions and partnerships between the health, spa and wellness industries. In Canada, the CTC has launched a Spa, Health and Wellness Task Force for this product portfolio. See also, Finnicum, P. and Zeiger, J.B. (1996). "Tourism and wellness: A natural alliance in a natural state," Parks and Recreation. Vol. 31, Issue 9, (September), p. 84, and The Globe and Mail (2004), "The Health Issue," July 10, Section T.

³ Yukon Arts Centre Corporation (2004, February), The Yukon's Cultural Labour Force. Whitehorse, Yukon.

4.1 What is “health and wellness”?

Up until 30 years ago, the most commonly referred to definition of health was that it explicitly implied “the absence of illness.” In 1970 however, the World Health Organization (WHO) formulated a definition of health that has influenced the medical model of health care and challenged our perceptions of what it means to be healthy. The WHO defined health as “a state of complete physical, mental, and social well being, not merely the absence of disease or infirmity.”⁴ More recently, contemporary definitions for health have been enhanced by the concept of “wellness” and the values and principles that have evolved from it. “Wellness,” in this instance, can be described as “a process in which an individual makes choices and engages in activities in a way that leads to health-promoting lifestyles, which in turn positively impact the multiple dimensions of the individual’s well being.”⁵

Wellness is first and foremost a choice to assume responsibility for the quality of your life. It begins with a conscious decision to shape a healthy lifestyle. Wellness is a mind set, a predisposition to adopt a series of key principles in varied life areas that lead to high levels of well being and life satisfaction.

- Don Ardell, Ph.D., Living Well Centre, University at Buffalo
<http://www.livingwell.buffalo.edu/well.shtml>

Some experts engaged with defining “wellness” have proposed that there are four essential ingredients associated with it. They are: (1) A lifelong approach emphasizing permanent lifestyle changes; (2) Taking responsibility for one’s own actions; (3) Adding to the quality of one’s life, not simply extending the length of life, and (4) Making choices that improves an individual’s position on the lifestyle continuum.⁶ In this sense, the idea of wellness has paved the way for a more holistic approach to health.

Philosophically, the wellness movement could have had its roots in the Greek civilization because the concept includes wholeness of mind and body and in the Greek culture programs of physical education became a systematic part of overall education.

- Cardinal, B. J. & Krause, J. V. (1989), “Physical Fitness: The Hub of the Wellness Wheel.”

⁴ Shillingford J. and Shillingford A., (1991). Downloaded from:
http://www.earlham.edu/~awpe/wellness_program.html

⁵ Finnicum, P. and Zeiger, J.B. (1996). “Tourism and wellness: A natural alliance in a natural state,” Parks and Recreation. Vol. 31, Issue 9, (September).

⁶ Adapted from: Cardinal, B. J. & Krause, J. V. (1989). “Physical Fitness: The Hub of the Wellness Wheel.” Dubuque: Kendell Hunt Publishing.

Other researchers, for example those affiliated with the *German Well Association*, reached the conclusion that the numerous definitions of wellness share common features. Key among them is the importance of life style, self-responsibility for health, and the exploitation of a person's potential for a better quality of health. More than the absence of illness, contemporary definitions of health fundamentally include elements of "wellness." By many accounts, "wellness" can be seen as "a state of health featuring the harmony of body, mind and spirit with physical fitness, healthy nutrition and diet, relaxation, meditation, mental activity/learning, environmental sensitivity and social contacts."⁷

Wellness is an active, lifelong process of becoming aware of and making choices toward a more healthy and fulfilling life.

- Wellness on line program: <http://www.healthyeatingclub.org/yourhealth/programs/wellness/introx.htm>

4.2 What is the "health and wellness" industry?

Research undertaken by Spas Ontario demonstrates that "today's health and wellness consumer seeks to look and feel better; to lose weight; to slow the effects of aging; to relieve pain or discomfort; to manage stress; or to partake in the use of natural supplements like vitamins and minerals to improve their health."⁸ In response to this, today's health and wellness programs respond to the growing consumer demands for fitness level improvement; for healthy lifestyle education; for nutrition counseling; for healing; for preventative medicine; for solving personal problems like stress or depression; and for holistic, naturopathic, alternative or eastern medicinal practices/therapies.⁹ Combining the consumer's quest for health and wellness with travel, leisure, and fun (products of the travel industry) is, "simply stated, spa, health and wellness tourism."¹⁰ It follows that since people take part in recreational, cultural, and entertainment and educational activities while on vacation, that "tourism is a perfect vehicle for promoting wellness."¹¹

⁷ Finnicum, P. and Zeiger, J.B. (1996). "Tourism and wellness: A natural alliance in a natural state," Parks and Recreation. Vol. 31, Issue 9, (September), p. 84, and, Mueller, H. and Lanz Kaufmann, E. (2004). "Wellness Tourism: Market analysis of a special health tourism segment and implications for the hotel industry." University of Berne, Switzerland: Research Institute for Leisure and Tourism. Downloaded from: www.Lanzkaufmann.ch/doc.

⁸ Economic Planning Group, Spas Ontario, (2003). "A Business Plan for Spas Ontario: 2004-2008."

⁹ Ibid.

¹⁰ Mel Zuckerman, Resort spa developer of Canyon Ranch, Arizona.

¹¹ Finnicum, P. and Zeiger, J.B. (1996). "Tourism and wellness: A natural alliance in a natural state," Parks and Recreation. Vol. 31, Issue 9, (September), p. 84 and, Mueller, H. and Lanz Kaufmann, E. (2004).

4.3 A very brief history of health and wellness tourism

In her study of health tourism, Kim Ross states that the earliest forms of health tourism that are directly related to contemporary health and wellness include visits to mineral and hot springs. She further claims that these activities date back to the Neolithic and Bronze ages in Europe and that “legend says Bath, England was founded by Bladud, father of King Lear, in 863 BC.”¹² The use of mineral and hot springs during the Middle Ages are characterized by a firmly established belief in the curative powers of thermal springs. Ponce de Leon brought the concept to the New World in the 16th Century when he traveled to Florida in search of the fountain of youth. By the 1700s and 1800s, "taking the waters" at spa towns such as Baden-Baden was popular with the upper crust on both sides of the Atlantic.

In the late 19th Century, the emerging urban middle class sought the healthful benefits of fresh sea or mountain air as an antidote to the overcrowding and pollution wrought by industrialization. Ross states that, “a new era of health tourism began in the US in 1939 with the opening of a \$17.50-a-week bring-your-tent spa, and healthy-living retreat, which became the renowned *Rancho La Puerta Fitness Resort*. By 1958 the healthy living idea had moved north to the San Diego area with the creation of the *Golden Door*, a luxurious destination spa well known for its lavish individual service and successful mind-body programs.”¹³ In the same vein, *Tucson's Canyon Ranch* was opened in 1979 and still provides pampering, fitness and medically supervised wellness programs. The early 20th Century saw the emergence of "health farms" or "fat farms" where the emphasis was on “fitness and good diet.”

According to the Ross study, “the notion of spas for the mass tourism market, however, didn't take off until the late 1980s.”¹⁴ Moreover, it was not until 1991 that the International Spa Association was formed. Since that time, the number of spas has grown exponentially.

“Wellness Tourism: Market analysis of a special health tourism segment and implications for the hotel industry.” University of Berne, Switzerland: Research Institute for Leisure and Tourism. Downloaded from: www.Lanzkaufmann.ch/doc.

¹² Ross, K. (2001). “Health Tourism: An overview.” *HSMIAI Marketing Review* (December). Downloaded from: www.hospatality/net.org

¹³ Ibid.

¹⁴ Ibid.

Health tourism in the late 19th Century: “The therapeutic holiday”

What Jackson Lears has aptly named ‘the therapeutic world-view,’ which includes the compulsive search for ‘wellness’ as a persistent element of the modern condition, was an element of the ongoing sense of crisis which had particular significance for the tourist industry. The therapeutic holiday, in a sense, was nothing new, as the sea, the spa, and foreign travel in general had long been favoured by doctors as treatments for well-to-do patients. Sea air or the taking of mineral waters restored the body, while a change of scene – the stimulation and excitement of new places and dramatic vistas – was a valued and pleasurable treatment for ennui and depression.

- Jasen, P. (1995), Wild Things: Nature, Culture, and Tourism in Ontario 1790-1914, p. 107.

Turning from “spas” to “destinations,” the Ross research describes how “certain destinations have catered to health tourists for centuries. Bath and Baden-Baden have been spa destinations since Roman times. Elsewhere, it was the supposedly “healing waters” that put Saratoga Springs, New York, and Hot Springs, Arkansas, on the map. Similarly, in the late 19th and early 20th centuries, the warm dry climate of the Southwest attracted those with respiratory problems.¹⁵

Today, promoting the healthful and health-care benefits of a destination is gaining popularity because tourism marketers need ways to differentiate their products and their destinations. An Internet search finds dozens of countries touting their health tourism activities, including some that many tourists would not normally associate with health promoting conditions. Among them are, for instance, Ethiopia, Pakistan, Yemen, Bulgaria, Siberia and El Salvador. Canada and the Yukon, with their resplendent natural and wilderness settings are environments that increasingly symbolize all the elements that are conducive to good health and well being. It would appear that the Yukon, a place that characterizes pristine wilderness and untouched natural settings within the context of Canada (itself a “natural destination”), is well placed to benefit from the surging worldwide interest in health and wellness tourism.

¹⁵ Ibid.

Nature as healer, wilderness as wellness...

*Here we shall commune with her and no other;
Care and the battle of life shall cease;
Men, her degenerate children, behind us,
Full of rest, as we gaze on the face of our mother,
Earth in the health and the strength of her peace.*

Much of the nature writing and tourist literature of the late nineteenth and early twentieth centuries adopted this therapeutic world-view, this desire to bury oneself in the bosom of the great mother who soothes away all hurts and cares.

- Jasen, P. (1995), Wild Things: Nature, Culture, and Tourism in Ontario 1790-1914, p. 110.

The early history of the spa, and health and wellness industry presented here, albeit limited in scope, provides some useful reference points for the development of a Health and Wellness tourism industry for the Yukon.

4.4 Some factors contributing to the growth of health and wellness tourism industry

The most dominant factor impacting upon the growth of the HWT industry is the ever-increasing number of aging “Baby Boomers”: there is an estimated 78 million Baby Boomers in the United States alone. Boomers' interest and desire for travel opportunities that also meet their health needs is becoming a market force that greatly influences the development of this tourism niche market. In fact, Boomers already represent 60 percent of the spa market.

A second factor is North America's, and indeed the worlds', fascination with fitness and alternative therapies and their use for promoting and enhancing health and healing. Some statistics help tell the story: 42 percent of Americans spent \$21 billion on non-traditional medical therapies and products in 1997. Between 1998 and 2001, nearly 25 million U.S. travellers began using a fitness center or gym to combat obesity while traveling.¹⁶ The story is just as compelling in Canada: the *Berger Population Health Monitor* reported that 61% of Canadians use vitamins and 38% use plant based natural health products (regionally, statistics demonstrated that use was highest in western

¹⁶ Ross, K. (2001). “Health Tourism: An overview.” HSMIAI Marketing Review, (December). Downloaded from: www.hospitality/net.org

Canada).¹⁷ Another study done by the *Tzu Chi Institute* found that reimbursements by insurance companies for alternative medical treatments (undefined in the report) rose from less than 50 million dollars in 1989 to more than 250 million dollars in 2000.¹⁸

A third element that contributes to the increase in health tourism is the fact that today's consumers are well traveled. As a result they seek something new and different in a holiday experience. They often want something educational or experiential,¹⁹ and many aspects of health and wellness tourism also fulfill those requirements.

Just how "healthy" is health and wellness tourism? The first Canadian Tourism Resource Guide released in 2003/04 included a directory of new products and services with a special section on spa vacations. They describe this niche market as "generating US \$2 billion worth of business in North America" and as providing "some of Canada's top travel options."²⁰

4.5 A few words on "medical tourism"

Although the feasibility of medical tourism in the Yukon is not the focus of this study, a fourth reason for the growth of health tourism can be found in the delivery of various national health care systems. For example, in Canada and Britain, long waiting lists for medical treatment at home have caused some citizens to leave their respective countries to seek medical care. Moreover, as the Ross review indicates, cost can also be a factor. As an example, Ross quotes a British newspaper as having reported that, "a cataract operation in Britain costs around \$4,500, but only \$2,250 in France. In India, the same cataract removal is only \$345. A hip replacement in London costs as much as \$12,000, but in Siberia a mere \$1,500."²¹

Promotion of a country's low cost and/or high quality health care and medical innovations has proven very effective in attracting visitors. One percent of all international visitors to the United States went there for medical treatment: that translates to approximately 247,000 people. Elsewhere, Costa Rica's Health Tourism Corporation reports that this tiny Central American nation annually attracts 150,000 "health tourists," and *U.S. News On Line* reported that in 1997 Cuba earned \$25 million from health tourism.

Another example may be useful in terms of looking for ways to define health and wellness tourism for the purposes of this study. In Malaysia, health tourism can be defined as "travel for the purpose of enhancing the well being of the mind, body and

¹⁷ Downloaded from http://www.reseaproteux.net/fr/Actualites/Statistiques/Fiche.aspx?doc=PSN_2002_st on March 4, 2005.

¹⁸ Downloaded from http://www.reseaproteux.net/fr/Actualites/Statistiques/Fiche.aspx?doc=medecines_alternatives on March 4, 2005.

¹⁹ CTC (2001). "Canadian Ed-ventures," Volume 1, April.

²⁰ The Baxter Group (2003). "The Canadian tourism Resource Guide 2003/04: A Directory of New Products and Services." Toronto, Ontario.

²¹ Ross, K. (2001).

spirit of the individual, families and groups.”²² The concept of health tourism was introduced in 1998 by the Malaysian government in response to the Asian economic crisis and their search of new and sustainable economic growth areas. By 2000, it was reported that an average of 160,000 visitors per year were seeking “medical treatment” in Malaysia. According to that country’s Health Ministry, they categorized all healthcare-cum-tourism activities as health tourism. These activities are perceived as being able to generate wealth for the local economy and therefore any healthcare program, which covers medical care, wellness and fitness, etc., is valued as “health tourism.”

Other trends in medical tourism are worthy of mention. For instance, Ross points out that international organizations are going “a step further by making hospitals more like spas and spas more like hospitals. Such facilities integrate alternative medical therapies with conventional Western medicine. They perform operations and otherwise treat and rehabilitate people who are sick or injured, but they do so in a more congenial, resort-like atmosphere.” She adds “spas are not the only things that draw health tourists to a destination.”²³

It is worth mentioning that an indeterminate amount of medical tourism already occurs in the Yukon. Destination travellers from Alaska and northern BC, as well as highway travellers passing through Whitehorse, buy health related services and products from the Whitehorse General Hospital, local pharmacies, local therapists, and health food stores for reasons such as cost or accessibility. These consumers can be seen to represent part of an already existing market for HWT products and services.

4.6 Defining today’s health and wellness tourism

Although there appears to be no single definition for today’s health and wellness tourism, a simple and succinct description comes from Mary Tabacchi, a registered dietician who teaches at Cornell University’s School of Hotel Administration. Tabacchi is also the researcher behind the first ever Spa-related consumer research.²⁴ According to Tabacchi, health tourism is “any kind of travel to make yourself or a member of your family healthier.”²⁵

Wellness tourism is sometimes regarded as a sub-category of health tourism. However, it is often difficult to separate the two types of products and services being offered to visitors in the contemporary health and wellness tourism industry. For example, some experts define “health tourism” as “the sum of all the relationships and phenomena resulting from a change in location and residence by people in order to promote, stabilize and, as appropriate, restore physical, mental and social well being using

²² “Health Tourism to drive earnings” downloaded from www.mier.org on 19 April, 2003.

²³ Ross, K. (2001). “Health Tourism: An overview.” *HSMAI Marketing Review*, (December). Downloaded from: www.hospitality/net.org

²⁴ Tabacchi, M. (2003). “The Spa Industry & Consumer Study.” In partnership with *Leading Spas of Canada*.

²⁵ Ibid.

traditional public or private health services.”²⁶ This is quite different than the same experts’ definition of “wellness tourism” which is proposed to be “the sum of all the relationships and phenomena resulting from a journey and residence by people whose main motive is to preserve or promote their health.”²⁷

Although there is a link between the two definitions above, in this study’s examination of the health and wellness tourism industry, the basic objective is to focus on the “wellness” component. This feasibility study proposes that, in the Yukon context, health and wellness tourism activities are, and will be, pursued, in the main by “healthy” people and that their primary goals will be to prevent illness and preserve, promote or enhance their overall health and well being. Therefore, a Yukon HWT will likely involve a view of wellness that involves the travel motivations and activities of healthy people and their desire to prevent problems so they stay well, both physically and mentally.

In their research and marketing literature, the Canadian Tourism Commission (CTC) supports the idea that health tourism and wellness tourism are two different products. On the one hand are found clients with various medical conditions who are motivated to travel so that they can experience therapies that will help to make them well or to improve their health. On the other hand are clients who are generally healthy to start with and who are motivated to travel so that they can experience therapies and activities that will promote, enhance, and otherwise maintain a sense of well being. The CTC explain that, “it may sound like hair-splitting, but they really are very different needs and are addressed in different ways.”²⁸ As will be seen in this study however, there is a lot of overlap between health and wellness tourism, especially in terms of their markets and in terms of the range of services offered.

The wide variety of health and wellness definitions being used in the spa, health and wellness tourism industry can be illustrated with a review of current spa categories as defined by the industry.

4.7 Spa categories

The nature of a Yukon Health and Wellness Tourism industry may not focus exclusively or hardly at all on “spa” type facilities. However, it is useful to review the different types of spa categories as they will inform and possibly guide some of the development of this industry in the Yukon. The following is a descriptive list of seven

²⁶ Finnicum, P. and Zeiger, J.B. (1996). “Tourism and wellness: A natural alliance in a natural state,” Parks and Recreation. Vol. 31, Issue 9, (September), p. 84, and, Mueller, H. and Lanz Kaufmann, E. (2004). Wellness Tourism: Market analysis of a special health tourism segment and implications for the hotel industry. University of Berne, Switzerland: Research Institute for Leisure and Tourism. Downloaded from: www.Lanzkaufmann.ch/doc.

²⁷ Ibid.

²⁸ CTC (2004). “You CAN collect memories,” p.4. (July).

spa facility types identified by the International Spa Association (ISPA). At the end of each facility type is a brief comment on its applicability or conceptual usefulness for the development of a Yukon HWT:

(1) Club Spa: A facility whose primary purpose is fitness and which offers a variety of professionally administered spa services on a day-use basis.

Yukon Context: There are no facilities in the Yukon that exactly fit with this spa-type facility. However, there are at least three health club type facilities that offer limited spa type services. For instance, both *Peak Fitness* and *Better Bodies* offer massage therapy services.

(2) Cruise Ship Spa: A spa within a cruise ship providing professionally administered spa services, fitness and wellness components, and spa cuisine menu choices.

Yukon Context: Not applicable to the Yukon.

(3) Day Spa: A spa offering professionally administered spa services to clients on a day use basis. This category of spa is the most prolific both in Canada and the USA.

Yukon Context: There are at least two facilities in the Yukon that presently offer “day spa type” services: *Head to Toe Hair and Body Studio* and *Amberley’s Day Spa*.

(4) Destination Spa: A spa whose sole purpose is to provide guests with lifestyle choices improvement, and health enhancement through professionally administered spa services, physical fitness and exercise, educational programming, such as nutrition and stress management, and a sense of community through such features as on-site accommodations. Spa cuisine is frequently exclusively served.

Yukon Context: There are no equivalent facilities in the Yukon presently offering these spa-type services. Certain existing facilities, such as hotels (*Westmark Hotel*), B&B’s (*Hawkins House*), and Inns (*Inn on the Lake* and *High Country Inn*), as well as the planned *Carcross/Tagish First Nations Four Mountains Resort*, could be tailored to fit into this spa category or offer some of the services associated with this type of spa.

(5) Medical Spa: A spa whose primary purpose is to provide comprehensive medical and wellness care in an environment which integrates spa services, as well as conventional and complementary therapies and treatments. It is predicted that this spa category will realize strong growth in the next few years as more consumers seek holistic medical treatments and complementary therapies.

Yukon Context: Largely because of concerns regarding the privatization of services within Canada's National Health System, the development of privately operated medical spas is not applicable to the Yukon. However, there have been preliminary discussions between members of Yukon Wholistic Health Network (YWHN), and public health authorities to assess the idea of a Yukon Centre for Integrated Health and Wellness. Such a centre would offer some of these services, such as spa-type services, conventional, alternative, and complementary therapies, and self-help educational services.

Destination spas and medical spas are spa categories most widely associated with health and wellness programs. These types of facilities offer traditional spa services [beauty and pampering], traditional and/or non-traditional medical services, fitness programs and resort amenities. A growing number are offering European style services in combination with Aboriginal and Asian treatments.

- Ross, K. (2001).

(6) Mineral Springs Spa: A spa offering on-site natural mineral, thermal, or seawater baths, which are used in professionally administered hydrotherapy treatments. This category of spa is associated with the European spa product. In Canada, this spa category is primarily associated with the mineral hot springs spa facilities found in British Columbia, Alberta and Saskatchewan, and are characterized by naturally occurring, water-based health and wellness treatments.

Yukon Context: The *Takhini Hot Springs* facility in the Yukon presently fits most closely with this spa category.

(7) Resort/Hotel Spa: A spa within a resort/hotel that provides professionally administered spa services, fitness and wellness components and spa cuisine menu choices. This category represents the second largest group of spa facilities in North America. The majority of these facilities has been, and is, developed as a profitable amenity added to traditional resort/hotel. Consumer trends indicate that spa facilities in a resort/hotel setting will become the deciding factor in a resort vacation.

Yukon Context: Similar to the destination spa category above, there are no equivalent facilities in the Yukon presently offering these spa-type services. Certain existing facilities, such as hotels (*Westmark Hotel*), B&B's (*Hawkins House*), and Inns (*Inn on the Lake* and *High Country Inn*), as well as the planned *Carcross/Tagish First Nations*

Four Mountains Resort, could be tailored to fit into this spa category or offer some of the services associated with this type of spa.

Resorts and hotels are joining the health spa development craze, albeit only some resorts are moving into the scope of services currently offered by destination spas. Likewise, a growing number of day spas are adding health and wellness programming options.

- Ross, K. (2001).

4.8 Canadian Tourism Commission (CTC) industry highlights

In defining the scope and parameters for its focus on spa, health and wellness tourism, the CTC targets those spa industry stakeholders who conform to these established guidelines:

- Spa facilities that offer health and wellness programs administered by professionally trained medical personnel.
- Spa facilities with fixed accommodations or accommodations offered through a cooperative agreement with a stand-alone accommodation facility.
- Spa facilities where traceable tourism visitation accounts for a minimum of 10% of its gross revenues.²⁹

The focus on spa facilities by the CTC presently has limited application to the Yukon's tourism development context. However, the CTC's description of the spa sector profile may be important for the future development of the health and wellness industry in the territory. For instance, the Yukon situation could change dramatically in the near future because of projects such as the *Carcross/Tagish First Nations Four Mountains Resort*. Additionally, and also relevant to the Yukon's HWT development context, the CTC is "mindful of the large Canadian day spa constituency that may be less familiar with the tourism industry."³⁰

²⁹ CTC (2004). "Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission." Verschuren, F. (Updated, December).

³⁰ CTC (2005). "For the health of it...a business strategy for spa health & wellness tourism in Canada,"

The day spa constituency has particular significance for the Yukon's HWT industry as much of our existing product falls under this spa category – or could be positioned to fall under this category. Day spas are an important complementary add-on for tourists who are already in the territory doing other things, or already coming here for other reasons.³¹ Notwithstanding the spa focus that appears to dominate the spa, health and wellness tourism industry, there is considerable room to expand the definition of health and wellness tourism so that it fits with the Yukon's existing and potential product offerings. Most compelling are the potential packages that can be created given the variety of product offering that exists or that is already emerging. Foremost, this product, and these packages, can be marketed in the quintessentially natural setting, and health-promoting environment, which is the Yukon.

In summary, health and wellness tourism definitions vary widely. However, for the purposes of this feasibility study, a definition of health and wellness tourism in the context of the Yukon will include selected information from the various definitions found in this section. Such a definition, by necessity, will specifically concentrate on activities that orient people towards learning about or practicing self-care and other health and wellness practices. As well, a Yukon definition for HWT includes activities or lifestyle changing features that enable people to increase their access to information and knowledge about their health, about how to “live well,” and on how to take part in experiences that will enhance their physical, psychological, emotional and spiritual well being.

Finally, the Yukon should find ways to exploit the role the CTC has set out for itself with regard to HWT industry development. This role is one that stipulates that it will “undertake national initiatives that shall be of interest and benefit to the health and wellness tourism product segment across Canada.”³² Presumably, this includes non-spa, health and wellness tourism products and services, notably in regions where an exclusive focus on southern Canadian defined spa type environments is not desirable or possible.

The next section of this study will elaborate on how industry development issues apply to the Yukon.

5. Toward a Yukon health and wellness tourism industry

Previous sections have presented information on how health and wellness tourism (HWT) has been, and is currently, defined in Canada, and internationally. This section examines how health and wellness tourism has been positioned with regard to its specific applicability to a potential Yukon HWT industry. Activities and models found in other regions of Canada, the U.S., and internationally are described in summary fashion and pay attention to regions that are geographically similar to the Yukon (i.e., wilderness context), or that share other characteristics (i.e., the industry development context, etc.).

³¹ See Section 7 for a discussion on complementary market segments already travelling to/in the Yukon.

³² CTC, (2004).

This section will also present examples of existing HWT activities and products in the territory that are, or could be, considered part of a Yukon HWT industry. Finally, sample Yukon HWT package will be presented.

5.1 Positioning health and wellness tourism in the Yukon

The CTC along with other HWT industry planners have begun promotion of health and wellness tourism under a variety of different themes – themes that relate very well with the Yukon’s tourism structure and its wilderness setting.

Tourism structure

For instance, the CTC’s 2004/05 tourism resource guide highlighted health and wellness tourism and included nearly a dozen lodges, B & B’s, retreats and inns located in small communities that offer spa-like services in ways that resonate with how they might be offered in the Yukon context. One useful example is *The Woodlawn Inn* (www.woodlawninn.com). This facility could serve as an excellent model for the Yukon because it is a small inn, and is able to offer spa-like services by hiring Complementary and Alternative Medicine (CAM) practitioners to their clients on an “as needed” basis. Located in Coburg, Ontario, they describe their services in light of their collaborations with local partners. They state, “Many of our partners, all professional practitioners, are located only steps away from the Inn.”³³

Wilderness setting

CTC’s health and wellness tourism branding is summarized with this promotional statement:

If the focus for your next vacation is on wellness or spirituality, Canada offers a multitude of travel experiences that cater to many faiths and lifestyles. Go to a spiritual retreat and participate in yoga classes while learning the art of meditation. Visit historical churches...meet with religious groups and participate in workshops, conferences and seminars on world religions. Discover the spirituality of Canada’s aboriginal cultures and refresh your soul in a serene wilderness setting.³⁴

However, Canada’s national tourism agency is not the only industry proponent marketing the alliance between health and wellness tourism and wilderness settings. *Leading Spas of Canada*, a national spa industry advocacy and development organization, engages wellness with nature through the use of powerful imagery: “Unwind your mind ... where the forests are gloriously

³³ CTC (2004). “The Canadian Tourism Resource Guide 2004/05: A Directory of New Products & Services.” Baxter Group: Toronto, Ontario.

³⁴ CTC (2004) “You CAN collect memories” (July).

emerald and the waters elegantly cool. Are you aching to breathe air that makes your skin tingle? Jump into the steamy waters of a hot springs pool ...”³⁵

A number of websites also specifically link the idea of Canada’s wilderness and natural environments with the promotion of health and wellness tourism. One example of this is the *Canada Lodges and Resorts Vacations* website.³⁶ Their introductory page sums up many of the essential HWT assets that already exist in the Yukon, and that support the idea for a territorial HWT industry. Their positioning is summed up with the following statement:

Canada is a beautiful country with everything you need to make health and fitness the number one item on your getaway plan. Health is very important to Canadians. Interaction with nature, good diet, exercise and fresh air are encouraged.” Canada means fitness and beauty, health and well being, peace and relaxation. Take some time and pamper yourself, and those you love. Experience haute cuisine and organic vegetarian delights.³⁷

The website also promotes the north (NWT) specifically and emphasizes important aspects of the HWT industry that are unique to the north, including the Yukon.³⁸ Unique industry attributes found here often highlight a renewed interest in the cultural values associated with isolation, frontier history, wilderness, Aboriginal cultures, and local/traditional foods:

Nurture yourself on the northwest shore of Great Slave Lake, Northwest Territories, Canada. Slide back in time to the formation of earth herself, and enjoy the healing comfort of our wilderness spa. Sah Naji Kwe offers the ultimate wilderness spa experience. Clay is Mother Earth's own skin; strong, supple and enduring. The clay deposit at Sah Naji Kwe was created and cleansed by the purifying forces of wind and water. This natural deposit of marine glacial clay in its pristine granite setting retains a nurturing, therapeutic power to rejuvenate your body and revitalize your soul.

A northern approach to HWT could also take advantage of the links between HWT and other special interest tourism such as wilderness and adventure tourism:

Our summer days last up to 22 hours. Absorb the flow of the natural world around you, and bathe in the warm

³⁵ Ibid.

³⁶ www.lodgesresorts.com

³⁷ Downloaded from: www.lodgesresorts.com/nwt-spas.html

³⁸ www.lodgesresorts.com/nwt-spas.html

shallows of Great Slave Lake as eagles and Arctic terns soar above. In the evening, by late August, you can watch the spectacular show of the northern lights: Woodland walks and hikes; Bird watching; Canoeing; Bathing in marine glacial clay, right at its source; Wood-burning Sauna; Massage; Reflexology; Breath Integration Therapy; Meditation.³⁹

See appendix 4 for examples of wilderness spas in Canada and information on the only northern spa that exists today.

5.2 Health and wellness tourism “On Yukon Time”

A Yukon HWT industry will benefit from being a rural, wilderness and isolated destination. It can also capitalize on the unique character of Yukon’s First Nations culture and their traditional ties to wellness and land-based values. Similarly, a Yukon HWT can promote itself in tandem with a focus on its “northern lifestyles,” and how these have evolved through living alongside, and with the wilderness.

The *Leading Spas of Canada* directory contains examples of spas located in rural areas and suggests products and services that could be adapted for implementation in the Yukon. These spas and retreats offer packages that combine complementary and alternative therapies and services with eco-adventures and outdoor activities. The best of the new breed of outdoor or adventure spas combine traditional spa treatments with challenging outdoor activities such as rock climbing, mountain biking and kayaking as well as “soft” adventures such as hiking, bird watching and photography.⁴⁰

The HWT industry also complements events such as conferences, educational workshops and festivals. An example, which could be emulated in the Yukon, is the “Nelson Summer of Learning” an event that “turns this funky Kootenay town of 9,700 into one giant educational campus”— a campus that offers a wide variety of HWT related learning activities. A sampling of offerings found in their 2004 program include: Art Therapy; Health and Wellness; World Cuisine; Psychoanalysis and Art Therapy; Self-Care for Helping Professionals; Yoga; Maintaining Beauty through Traditional Chinese Medicine; Thrive, not survive: Tools for Change Series; Chinese Medicine for Women; Basic Acupressure for Relaxation; and The Tao of Love and Sex.⁴¹

Given how arts communities can enhance health and wellness tourism activities, it is significant and worth mentioning that several Yukon communities are in the process of trying to position themselves as “arts communities.” Whitehorse is working towards this through *Artspace North* and the *Main Street Arts Society*, Dawson City through the *Klondike Institute of Art and Culture*, and the town of Faro has been busy creating festivals and events that already have begun to change the way people think about the

³⁹ Ibid.

⁴⁰ www.spafinder.com

⁴¹ www.nelsonlearning.ca

former mining town “in the middle of nowhere.” These kinds of events - and this kind of vision - all contribute to the potential for a vibrant HWT industry in the Yukon.

Retreats, once the main purview of religious organizations, have branched out to include a plethora of offerings, spiritual, secular and even supernatural.⁴² The modern retreat has, potentially, an important role to play in the building of a HWT industry. A Yukon version would likely involve the delivery of therapeutic arts and music services, meditation, nutrition and cooking classes, as well as instruction in alternative therapies, spiritual workshops, and vigorous activities in the wilderness. *The Atlin Art Centre, Hollyhock, Johnson’s Landing Retreat*, the Buddhism schools *Skycliffe*, the *Salt Spring Centre of Yoga*, the United Church of Canada’s *Naramata Centre*, all in B.C., along with *L’Abbaye St. Benoit* in Quebec, are all examples of secular and religious retreat models.⁴³ The Mt. Sima Ski Society is in the planning stages with a new complex that may offer an appropriate retreat setting, which would include space for workshops, accommodations and dining facilities. *Sundog Retreat* and *Vista Outdoor Learning Centre* (both near Whitehorse) already provide these types of retreat spaces, as does *Ancient Voices Wilderness Camp* (near Dawson City).

Related organization models that could be important components of a Yukon HWT industry include private and non-profit arts centres, and health and wellness centres that cater to both residents and visitors alike. An example of the former is the *Roundhouse Community Arts and Recreation Centre* in Vancouver.⁴⁴ *The Arts at the Roundhouse* offers a wide assortment of arts and cultural industry activities, workshops, programs and festivals. Appendix 5 provides some examples of this type of health and wellness product in the *Arts at the Roundhouse 2004* activity itinerary. The latter organizations provide a variety of alternative and complementary health services, and also have meeting rooms and other specialized facilities that are rented to alternative health practitioners. Examples include the *MacLaren Centre* in Ottawa, the *Centre for Integrated Healing (CIH)* in Vancouver (with branches in Smithers and Sydney, BC),⁴⁵ and the *Centre for Spirituality and Healing* at the University of Minnesota. Along with conventional medicine, the CIH offers complementary and alternative therapies, as well as outreach courses and workshops that cater to both BC residents and visitors. The *Centre for Spirituality and Healing* offer a full calendar of activities that includes special and on-going health and wellness events that are open to the visiting public, as well as to residents. Examples from a recent calendar include, “The inner life of healers”, “Stress busters: free meditation instruction”, “Healing by design: therapeutic health benefits through landscape, garden and interior design” and “In harmony with nature’s blueprint.”⁴⁶

Educational institutions such as *Yukon College*, the Klondike Institute of Art and Culture, associations such as the *Yukon Conservation Society*, and tourism associations such as the

⁴² www.shanahspa.com (Native American), and www.rubyroom.com (the first all-spiritual-healing spa in the U.S.)

⁴³ www.atlinart.com , www.hollyhock.ca , www.johnsonslandingretreat.bc.ca, www.st-benoit-du-lac.com, www.humuh.org, www.naramatacentre.net, www.saltspringcentre.com

⁴⁴ www.roundhouse.ca

⁴⁵ www.maclarencentre.ca and www.healing.bc.ca

⁴⁶ www.csh.umn.edu/

Yukon First Nations Tourism Association and the *Wilderness Tourism Association of the Yukon*, can all play an important role in developing a Yukon HWT industry. It is also worth noting that the Yukon's health and wellness community, as well as its arts community, are already creating spaces that can be useful for a HWT industry. The "New Cambodia" complex is quickly becoming a home for many CAM practitioners, and will also house a yoga studio. As well, the [artists@work](#) collective just south of Whitehorse on the Alaska Highway (at MacCrea) is another example of a facility that can complement or host HWT activities.

5.3 Meeting community needs alongside tourism growth

When strategically planned, a health and wellness tourism industry can meet both the needs and demands of the HWT market, as well as assist in diversifying, strengthening and benefiting various Yukon economic, cultural and service sectors, including, public health, education, and cultural and heritage institutions. For instance, one of the incidental community benefits of HWT is that it can contribute to the maintenance and improvement of public health facilities in communities because it can provide additional sources of revenue that can be invested in their upgrading. Arguably, for example, the Whitehorse swimming pool could be seen also as an HWT product (which could become part of a HWT package) and fees paid there by visitors will contribute to its operation and maintenance, and from which Yukoners will benefit.

6. The Health and Wellness tourism market

Measuring the potential market for health and wellness products and services — and particularly for possible tourist demand — is extremely difficult. The health and wellness sector is very broad, and there has been little effort to date to measure it as a distinct market.

As part of the effort to find any applicable market research for this section, a general request for leads to any relevant studies was put out on a list serve for both American and Canadian travel directors (state and provincial) and tourism researchers.⁴⁷ All the responses flagged the work done on spa going and spa vacations by the Hartmann Group and the CTC: no other research or surveys were known to the list members.

This section on markets relies heavily on the CTC's recent spa research and uses it as a proxy market indicator for the health and wellness sector as a whole.⁴⁸

6.1 Market considerations

⁴⁷ State and Provincial Research Discussion Group

⁴⁸ CTC (2004). "Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission." Verschuren, F. (Updated, December).

One overarching market consideration in relation to health and wellness tourism is the increasing interest in a wide variety of unusual or exotic forms of vacation travel as a whole. The 2002 Travel Attitudes and Motivation Survey found that:

“There were considerable increases in the percent who reported being interested in the less common activity-based accommodations... For example, respondents were three times as likely to express an interest in staying at health spas... relative to the last two years. This suggests that the more exotic forms of vacation travel are on the increase.”⁴⁹

There is also the increasing focus on overall health among consumers:

“Today’s health and wellness programs respond to the growing consumer demands for fitness level improvement; for healthy lifestyle education; for nutrition counseling; for healing; for preventative medicine; for solving personal problems like stress or depression; for holistic, naturopathic, alternative or eastern medicinal practices/therapies.”⁵⁰

Another important market consideration is that health and wellness tourism has been found to be an all-season activity for tourists.

“A recent survey carried out on Spas relais santé clientele revealed that all seasons are favorable for health and wellness getaways. Member establishments have been busy year-round. This makes us believe that the health tourism industry represents an ideal four-season tourism product. We also noticed that customers were willing to book their stay during the off season which greatly contributes to making the health industry available any time of year.”⁵¹

Developing year-round tourism in the Yukon has been a priority for many years.

Finally, the Yukon’s health and wellness sector consists almost entirely of small or very small enterprises and there is currently no destination product (e.g. a destination spa) in the territory. The health and wellness tourist market in the present Yukon context will consist almost entirely of those travellers who are already coming to the Yukon.

6.2 National and international profile of spa-goers

What are the characteristics of consumers of health and wellness products? The table below is taken from work by the CTC and gives a profile of a sub-set of health and

⁴⁹Lang Research Inc. (2002) Travel Attitudes and Motivation Survey. “Emergent Vacation Interests.” (April, 2002), p.101

⁵⁰ CTC (2004). “Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission.” Verschuren, F. (Updated, December), p. 5.

⁵¹ Spas relais sante press release, September 23, 2004. Montreal

wellness consumers — the “spa-goer.”⁵² Given the dearth of data on the characteristics of the broader market for health and wellness, the spa-goer will serve as a demographic proxy.

Demographic	Canadian	American
Market Size		
From ISPA 2004 Study	20,200,000 spa visits	136,000,000 spa visits
Gender		
Day Spa	Female – 96%	Female – 85%
Destination/Resort Spa	Female – 84%	Female – 65%
Age		
Day Spa	25-55	Mean age is 45 Years
Destination/Resort Spa	36-55	Mean age is 47 years
Education		
	37-47% - University degree	39%-40% - College degree
	33% - Associate degree	41%-46% - some college
Household Income [HHI]		
	Expressed in Cdn\$	Expressed in US\$
Day Spa	<\$50K = 16% \$50K-\$80K = 25% \$80K-\$120K = 23% \$120-\$162K = 19% \$162K-\$242K = 10% >\$242K = 7%	<\$35K = 26% \$35K-\$45K = 10% \$45K-\$75K = 32% \$75K-\$99K = 18%
Destination/Resort Spa	<\$50K = 25% \$50K-\$80K = 28% \$80K-\$120K = 23% \$120-\$162K = 12% \$162K-\$242K = 8% >\$242K = 4%	<\$35K = 27% \$35K-\$45K = 11% \$45K-\$75K = 31% \$75K-\$99K = 15%
Marital Status		
	50%+ married	60%+ married
	35% - empty nesters [pre/no children]	14% - single
	29% - families with 1-2 children	20%+ - divorced/widowed/separated
Spa awareness factors		
	Word of mouth, website or previous experience	Word of mouth, received as a gift, website, newspaper advertising, travel agent, books/guides
Why visit a Spa?		
	Rest, relaxation, skin care, body treatments/massage, wellness education programs, healthful cuisine, outdoor adventure activities, hydrotherapy, yoga, T'ai Chi, Qi Gong, meditation.	Relaxation, pampering, stress reduction, rejuvenation, weight loss, enjoyment/personal reward /mental health, health reasons, fitness, beauty services
Spa-Goers Favorite Non-Spa Leisure Pursuits?		
%Day Spa Users vs. %Destination/Resort Spa Users	Adventure: 40%-43% Heritage: 12%-12% Family Time: 28%-22% Golf 9%-9% Learning: 3%-6%	

⁵² CTC (2004). “Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission.” Verschuren, F. (Updated, December).

Willingness to Travel for Destination/Resort Spa Vacation by Day Spa vs. Resort Spa Users	Anywhere – 63% vs. 61% To the US – 6% vs. 5% To Europe – 1% vs. 3% Only in Canada – 8% vs. 14% Own Province – 21% vs. 17%	
Seasonality for spa vacations	Year-round pursuit. Seasonality not a factor	

Spa-goers are predominantly middle-aged women with relatively high household incomes. In the destination spa category in Canada 75% have household incomes in excess of \$50,000. They tend to be well educated, with nearly half of Canadian spa-goers holding a university degree.

The Canadian spa-goers responses to the question on why they go to spas, what their other leisure pursuits are, and how willing they are to travel for a destination or resort spa experience are particularly interesting and encouraging in the Yukon health and wellness context.

Outdoor adventure activities are listed as one of the reasons for visiting spas and, somewhat surprisingly, Canadian spa-goers list adventure as their number one non-spa favorite leisure pursuit. It is worth noting that the adventure for these spa-goers are pursuing may not be of the “hang-gliding down the north face of Mount Logan” variety, rather, it is more likely to be a softer and somewhat more sedate style of adventure. However, spa-goers, and by extension other health and wellness consumers obviously see outdoor adventure activities as an important part of their leisure and this is an important marketing feature for a Yukon HWT sector.

The very high willingness to travel for a spa experience — more than 60% of spa-goers claiming a readiness to travel anywhere — is another highly encouraging feature of the potential market for a Yukon HWT sector, especially in the medium to long term as more destination-type health and wellness products are developed in the territory.

6.3 Yukon market segmentation and motivation for travel

There has been very little detailed research done on Yukon tourism market segmentation and what specifically motivates travellers to come to the Yukon. An exception is the 1999 DataPath study on market segmentation done for the Wilderness Tourism Association of the Yukon.⁵³ That study was focused on determining: overall interest in wilderness and adventure products, the level of interest in the Yukon, and what issues and problems people who wished to travel to the Yukon face.

Although its focus was obviously on the wilderness and adventure segments of the market, the DataPath study does have some relevance for the development of a health and

⁵³ DataPath Systems (1999). “Wilderness Tourism Association of the Yukon Market Research Segmentation Study.” (April 1999).

wellness tourism niche in the Yukon. The intersection of the wilderness/adventure segment with the spa-goers' listing of outdoor adventure as their number one non-spa pursuit was noted in Section 6.2 above.

The DataPath study found the top three benefits sought by travellers from a trip were:

1. Getting away from stress
2. Being safe and secure while on the trip, and
3. Indulging in rest and relaxation

In so far as wilderness and adventure tourists are also a potential health and wellness market, these benefits can also be gained through a health and wellness focused vacation — indeed, stress reduction is usually the number one reason for spa going and using other health and wellness products and services.

Further findings from the DataPath study were that those interested in visiting the Yukon placed slightly more importance than the average traveller on:

1. Connecting to nature,
2. Challenging oneself,
3. Being in a remote wilderness setting, and,
4. Personal growth.

6.4 Potential Yukon market profile

The best source for information on current visitors to the Yukon is the Visitor Exit Survey carried out for the Yukon's Department of Tourism and Culture every five years. Data from the latest survey, carried out in 2004 (the 2004 VES)⁵⁴ is only partially available at the time of writing this report. In addition, the VES is a broad survey that cannot be expected to provide a detailed look at travel motivation for example.

6.5 Current Yukon visitors

Given that the health and wellness tourist market in the present Yukon context will consist almost entirely of those travellers who are already coming to the Yukon, what segment of current visitors make the most likely customers for the Yukon's health and wellness providers?

From what we know of the profile of the most likely customers for health and wellness products and services, the demographic "sweet spot" is made up of:

- Women,
- Aged 36 to 55,
- Household incomes over \$50,000, and,
- Some university or college education.

⁵⁴ Department of Tourism and Culture, Yukon Territorial Government (2005). 2004 Visitor Exit Survey, Preliminary Results.

This is not intended to imply that *only* people fitting these criteria are likely customers, only that they make up the group most likely to travel for a health and wellness based vacation and, by extension, the most likely to take some time from an existing vacation to pursue their health and wellness.

Within that demographic grouping, the documented affinity many spa-goers have with the outdoors and soft adventures in the outdoors make people who also enjoy and participate in outdoor pursuits even better candidates as potential customers. The 2004 The VES asked people what activities they participated in while in the Yukon. The activities linked most closely with outdoor and soft adventure pursuits showed the following overall results:

- Visiting natural attractions 58%,
- Walking, backpacking or hiking 23%,
- Experiencing First Nation culture 23%, and,
- Wildlife watching 17%.

6.6 Gay and lesbian market niche

One market niche that has been receiving increased attention among tourism promoters around the world is the gay traveller. This is not surprising given the high average disposable income of these travellers. Unfortunately, we have found no studies that examine any links between gays and lesbians and either spa travel or health and wellness travel.

According to Tourism Intelligence International in 2000⁵⁵, some 10% of international tourists were gay or lesbians, accounting for more than 70 million arrivals worldwide. Some of the other core characteristics of the gay market are:

- High average incomes, 25% of American gays and lesbians earn more than \$100,000 annually.
- Tend to be highly educated, with 46% of American gays and lesbians being university graduates.
- Are trend setters and early innovators.
- Tend to demand quality and value for money.
- Among the top vacation preferences are culture and soft adventure.

Given the average high incomes, the preference for soft adventure (among other preferences) and the recent start-up of a gay-oriented travel booking agency in the Yukon, the gay market is one that should not be overlooked the effort to grow a health and wellness tourism industry in the territory.

⁵⁵ Tourism Intelligence International, Vol.9, No.1 2002. As reported in <http://www.kzn.org.za/kzn/investors/186.xml>

6.7 The health and wellness — soft outdoor adventure intersection

The intersection and overlap between those most likely to make up the health and wellness travel segment and the existing and well-studied soft adventure travel segment emerges from both the studies of spa-goers and the DataPath study discussed above.

The CTC has published an analysis of the Canadian soft outdoor adventure segment.⁵⁶ The basic demographics of the segment are:

- 75% are aged 18 to 44, with the average age of 40,
- 61% live in adult-only households,
- Somewhat more affluent than the typical traveller with average household income of \$58,200,
- Generally higher than average levels of education.

Among the findings of the analysis that are of special relevance to an effort to build a health and wellness tourism niche in the Yukon include:

- 58% hike or backpack in wilderness settings,
- 47% engage in wildlife viewing,
- 37% go kayaking or canoeing, and
- 32% engage in wildflower viewing.

6.8 Summary — the Yukon HWT market

In the longer term, targeting and developing specific markets for a health and wellness tourism industry will hinge in part on what form any destination-type health and wellness products are developed in the territory. It will also require considerably more research on the market segments that are most likely to take a broader health and wellness based vacation (as distinct from a spa based vacation).

In the short term, the development of a Yukon health and wellness tourism industry niche will rely almost entirely on attracting clients from those already visiting the Yukon for other reasons. Some key points in targeting current visitors include:

- Overall, women appear more likely to use health and wellness products and services than men.
- The 36-55 age range is likely to provide the most customers.
- Health and wellness customers are likely to have higher levels of education than the average and have higher than average household incomes.

There is some evidence that the segment most likely to use health and wellness services and products overlaps significantly with the soft adventure segment of travellers.

⁵⁶ Research Resolutions & Consulting Ltd. (no date), *Canadian Soft Outdoor Adventure Enthusiasts: A special analysis of the Travel Activities and Motivation Survey (TAMS)*. Canadian Tourism Commission.

7. Spa, health and wellness trends

The landmark *ISPA 2002 Consumer Trends Report* identified a number of trends that are important to note for the purposes of this feasibility study:⁵⁷

1. Consumers envision the spa experience as a requisite to staying healthy and looking good. This is a change from the previous mindset, which suggested that spas were all about pampering. The spa-goer is more knowledgeable about what she/he is seeking and is demanding better quality and consistency in the spa products and services they receive. Good service and good treatment are no longer enough. The consumer expects a stress-free environment complete with spa treatment programs that cater to improved well being.
2. Spas are expected to become a major vacation activity and spa vacations will enjoy the same profile and recognition as ski or golf vacations.
3. In their quest to balance work and leisure responsibilities, consumers are seeking flexibility in booking spa vacations [shorter but more frequent visits].
4. Consumers want simplicity in their spa, and particularly day-spa experiences: they want to “get back to basics.”
5. There is a growing interest in services for couples, particularly massage and hydrotherapy.
6. The Eastern/Asian wellness programs continue to be very strong within the industry segment. Yoga, pilates, reiki, ayurveda and Thai massage continue to be popular among Western consumers. There is also general agreement that a blending of the European and North American spa models will appear.

⁵⁷ *The International Spa Association (2002)* research was conducted by *The Hartman Group* and is a qualitative analysis of significant consumer trends and how they affect the spa industry. The survey describes how consumers' changing lifestyles are driving current and future spa behaviour and identifies significant future consumer trends in the U.S. spa industry. The ISPA has also recently published a quantitative study that develops a current profile of the spa industry in North America. This analysis addresses essential components of the industry such as size, rate of growth, key trends, medical services and retail. A study of this kind can provide vital information for anyone writing a business plan or planning a change in their spa, and includes the number of spas in Canada and the United States, industry revenues, space utilization, employment and spa visits. Because of the high cost of this market research (approximately \$1,000.00), neither of these reports was available for this feasibility study (ISPA: www.experienceispa.com). The CTC have highlighted some of the features of this study in their business case to support HWT. See footnote #3. Other features and trends from the study were presented at the 2005 Canadian Spa Industry Conference and Expo held in Toronto, April 10-12, 2005.

7. Strong growth is predicted in the medical spa product line in the future. The concept of an “*integrated wellness centre*” is becoming more popular. In this case traditional spas will be adding non-traditional medical treatments to their programming and medical clinics will add spa services. Medical type products such as laser treatments, Botox, and medical acupuncture will be featured.
8. Customization of the services offered to clients, and particularly therapist driven customization, is increasingly important to many spa goers as it makes each feel that she/he is being treated specially and individually.
9. There is a trend — seen as part of a wider cultural trend — among spa goers toward seeking out authentically local and indigenous products and experiences.
10. The trend toward seeking out the authentically local and indigenous is of particular interest in the Yukon HWT context. Providing products and services that are distinctly local and perhaps indigenous is a powerful way to market any tourism experience. The Sah Naji Kwe spa in the NWT has used exactly this approach as discussed above.

Elsewhere, *Spa Finder*⁵⁸ – the largest travel wholesaler of spa vacations in the world – noted the following trends in 2004:

11. Spas are becoming more and more relevant to everyday North Americans as more and more people turn to spas to improve their looks and their well being.
12. Medical spas will provide the prescription for health and wellness. Cosmetic treatments were the rage in 2003, but in 2004, baby boomers will use medical spas for truly medical purposes – namely preventative health treatments and regimens, nutrition and fitness, and health and wellness education.
13. A Spa experience will become more mainstream in the corporate world. Mixing business with ‘spa’ pleasure entails that businesses will engage the use of spas to build relationships, motivate employees, and manage employee health. Innovative businesses, including insurance providers, will underwrite regular spa visits to promote employee health and productivity and to lower medical costs.

(Interestingly, the American Academy of Family Physicians estimates that 60% of all problems brought to physicians are stress-related. US corporations lose approximately \$150 billion each year to stress-related disorders).
14. The “Destination Day Spa” will become a new spa facility category. Moving beyond the typical day experience, destination day spas offer a holistic mind/body/spirit experience similar to experiences normally associated with destination spas, minus accommodations. One-day mini retreats will include

⁵⁸ Hotel Marketing News Weekly (2004). February.

- education programs, fitness programs, and healthy meals, in addition to spa/beauty treatments.
15. The spa experience will become more affordable and inclusive of mainstream North America, thanks to the continued explosion of affordable spas geared to middle income earners seeking professional treatments and wellness programs.
 16. International spa tours will replace international spa treatments. Rather than seeking specific treatments from specific facilities, the international traveller will seek to sample a variety of spa experiences within the same destination.
 17. Spa cuisine will break out of the spa and into North American dining rooms, thanks to popular spa cuisine cookbooks and recipes. High-end spas will enlist celebrity chefs, expand menus, employ innovative branded diet programs, and accommodate special diets.
 18. Spas will become the primary consideration for many travellers. In recent years, the fastest growing segment of the hospitality industry was *hotels with spas*. Indications are that *spas with hotels* will become an even bigger factor in consumer travelling decisions. Rather than being an ‘amenity’ offered at hotels or resorts, spas will be the deciding factor or the primary draw.
 19. Spas will increasingly cater to pets; offer kennels and pet treatments and programs.
 20. Spas will continue to attract increasing numbers of men and offer male-focused activities like golf, outdoor and wilderness adventure activities, male cosmetic programs, and high-octane fitness programs. Men will use spas in record numbers and more spa facilities across the spectrum will offer equal facilities for men and women. (See, however, *Men and Spas* below).
 21. A strong family orientation will prevail. Teenage girls used spas in record numbers in 2003 for beauty treatments and the glamour of a luxurious spa experience. It is predicted that spas will cater to even younger visitors including boys. These young spa-goers will come with their families seeking health and wellness programs. Spas will cater to them by offering more family-oriented activities, spas-for-kids, and or kids-only spa programs.”⁵⁹

Another trend that is being noted especially among the “cutting-edge” spas is the decline of those looking for pampering and an increase in customers who treat spas and other health and wellness vacations as a form of self-improvement. In fact,

The spa association has gone so far as to recommend spas market themselves as a kind of vacation ‘work,’ calling our desire to improve ourselves, even at the

⁵⁹ CTC (2004). “Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission.” Verschuren, F. (Updated, December).

expense of fun, a ‘deep cultural driver.’ ‘The word ‘pampering’ has been effectively dropped from the conversation,’ Mr. Root, of Miraval, said. ‘It’s more experiential, it’s gotten into purposefulness.’⁶⁰

This purposefulness trend is of special interest to the Yukon HWT context. The previous section on market considerations noted that the runaway favourite non-spa leisure pursuit of spa-goers is adventure. The opportunity for the Yukon to capitalize on the intersection of these trends is obvious; the purposeful health and wellness enthusiast who is also very likely to be an active seeker of adventurous activities is an ideal market segment for the Yukon. Is he/she already here? They may be easily convinced to “Stay another day” at one of the Yukon’s Destination Day Spas...

These trends bode well for the continued development of the spa, health and wellness tourism industry generally. Many of them are likely to find an important place in the design of Yukon HWT tourism facilities, programs and services. More specifically, # 13 and #15 are particularly important for an emerging HWT in the territory.

Finally, research undertaken by *Leading Spas of Canada* has identified a number of trends for the next decade that are of particular interest in terms of their application to the Yukon. They propose that that the following will gain in significance and influence the nature of HWT:

- Eco-adventure spas will emerge where health and wellness activities will be combined with the great outdoors.
- As administrators increasingly equate wellness with staff productivity, corporate and government spa programs will become more popular.
- Environmentally friendly spas will have value-added appeal.
- Ancient therapies and products, especially those that provide for an Eastern and Asian influence, will become more popular.

Local and indigenous experiences will continue to attract travellers who are seeking authentic cultural, learning and healing vacations.

Case study: Men and spas

The trend toward men increasing their use of spas and other health and wellness products and services needs to be treated with care. Although men appear to be using spas more than in the past, they are still a decided minority, especially in the day-spa category. Recent research by the Canadian Spa Association indicates that only 16% of customers at destination spas are men and a tiny 4% of day-spa users are men. (See Section 6.2 of this paper for a more detailed look at the demographics of spa-goers). In general men still appear to be reluctant spa customers in part because spas explicitly cater largely to

⁶⁰ Zernike, K. (2005). “Relaxing is Serious Work.” *National Post*, January 8.

women. In *Beauty Tips from Moose Jaw*, Will Ferguson writes of the Moose Jaw spa *The Temple Gardens*:

“Who knew that beauty was so complicated? When I heard the word “facial” I imagined some sort of mud pack, maybe, with cucumbers over the eyes, like you see in the movies. It turns out to be far more complex than that. Ms. Hill goes through a dozen steps at least...The focus on wrinkles around the eyes — at least three of the steps seem to deal with these — is revealing. Temple Gardens, like spas everywhere, is aimed primarily at women. When it comes to aging, wrinkles aren’t something men worry about. Baldness, love handles, rampant and inexplicable ear hair: yes. But wrinkles? It’s one of the few remaining advantages of being a man that the creases around your eyes make you look distinguished, not old.”

But perhaps the general reluctance of men — at least heterosexual men — to spa-going springs from a deeper source:

“So I slink into the Temple Gardens spa, bathrobe pulled tight, eyes darting, and am taken to a small room where a reclining chair awaits. They are going to start at my feet and presumably work their way up. My reflexologist, I am told, will be with me shortly. A few minutes later the door opens and in walks... a guy.

This is not exactly what I expected. If anyone is going to fondle my feet, I’d prefer it wasn’t someone with a moustache.

“Brad Moffatt,” he says. I shake his hand in a gruff but friendly fashion. My voice has mysteriously dropped a few octaves.

“How about them Leafs?” I say.

Brad dims the lights and puts on soft music. It’s like being on a date. He begins rubbing mint lavender oil onto my feet, at which point I start dropping subtle hints that I am married. To a woman.

“I’m married.” I say. “To a woman.”

He nods and continues to rub. “You seem tense,” he says.

You don’t know the half of it.

- Ferguson, W. (2004). “Beauty Tips from Moose Jaw,” pp.81-83.

8. Spa, health and wellness infrastructure and economic profile: The Canadian and Yukon situations

The 2004 CTC business case referred to in this feasibility study is an HWT positioning report that is largely built around the spa sector of the HWT industry.⁶¹ The following

⁶¹ CTC (2004). “Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission.” Verschuren, F. (Updated, December).

section relies heavily on the CTC’s summary of the information found in a 2002 spa industry study undertaken by ISPA. The ISPA research estimated that there were “about 1300 spas in Canada, with 90% of them categorized as day spas.”⁶² Like the US, the Canadian spa industry segment is dominated by small and medium sized enterprises that are independently owned.

8.1 Canadian spas by geographic area

Province or area	Number of spas	% of Canadian total
Ontario	707	56
British Columbia	211	17
Alberta	121	10
Quebec	109	9
Atlantic Canada	66	5
Manitoba/Saskatchewan	39	3
Territories	8	1
Total	1,261	100

Not surprisingly, the distribution of spas in Canada roughly follows the nation’s population distribution.

In North American, over the last 8 years, the number of spas has grown by more than 20% annually. The largest growth occurred between 2000 and 2001 when the number of spas grew by an extraordinary 69%. In Canada, over 75% of all spa properties are less than 10 years old, indicating that the Canadian spa industry segment is growing rapidly. Consumer demand for programs and services to look and feel better continues to drive growth with a 71% increase in spa visits between 1999 and 2001. The Canadian Spa Association predicts that the industry segment is poised to easily double over the next 5 years. People are living and working longer and increasingly see the need to maintain a healthy, stress reduced, lifestyle.⁶³

8.2 Summary of Canadian spa sector, 2001

Number of spas	1,261
Total revenue generated	\$610,000,000
Average revenue generated	\$500,000
Total employees	16,700
Average visits per spa	6,500

⁶² The International SPA Association (ISPA) (2002). “2002 Spa Industry Study.” Price Waterhouse Coopers. Note: Data to be read with caution as the survey sample size was based only on 127 properties reporting.

⁶³ CTC (2004). “Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission.” Verschuren, F. (Updated, December).

Treatment rooms, retail space, and beauty salons are the core program areas for most spas. Three in ten facilities offer structured exercise programs/facilities and educational/nutritional classes for health and wellness issues. Only 13% of Canadian spas offer lodging and only 7% offer restaurant services.

While investor trends are not readily available for Canada, we can assume for the purposes of this study that trends uncovered by the ISPA 2002 research for the US are a barometer for Canada. As such, we can also assume that investor financing for the spa, health and wellness industry is coming from both private investors and banking institutions. As seen in Ontario, for example, spas continue to be a main component of many new resorts being built.

9. Yukon HWT products, services and facilities

Research undertaken for this feasibility study included the collection of background information on the Yukon's existing and potential HWT products and services. The data was collected under the following headings:

- Complementary and Alternative Medicine (CAM) Practitioners
- CAM Services
- HWT related products and supplies
- Recreation and adventure businesses and organizations
- Accommodations
- Attractions and events

It is expected that these CAM practitioners, CAM services, HWT and tourism related products and businesses, accommodations, health and wellness attractions, as well as arts and culture products, attractions and events, would be the essential building blocks of a Yukon HWT industry.

The survey was conducted using a variety of sources and represents only a partial listing of attributes in each category.⁶⁴ For example, the survey compiled the contact information and general product/service details of 90 active CAM practitioners and 253 (directly or indirectly) related HWT businesses. This accounts for roughly 40% of the estimated currently existing CAM practitioners and HWT businesses in the Yukon. Summary information on the data collected is presented in the following section. For a glossary of Glossary of common complementary and alternative medicine (CAM) terms used in the spa, health and wellness industry see appendix 6.

⁶⁴ City of Whitehorse Active Living Guide, Quarterly – *Sport Yukon Building*, What's Up Yukon, Bi-weekly newspaper – *found anywhere around town*, Yukon Agriculture Products Directory – *Yukon Ag Association*, Art Adventures: A Guide to Yukon Artists and their Studio's – *Hogans box office*, An Essential Guide to Services in Whitehorse 2004 – 2005 – *Yukon Volunteer Bureau*, *The community Directory and Where it's At: A Guide to programs and services for young people in the Yukon* – *Yukon Volunteer Bureau/BYTE*, *Yukon Wholistic Health Network*.

9.1 Complementary and Alternative Medicine (CAM) practitioners

90 different CAM Practitioners are listed under the following Spa and health and wellness categories:

- Medical Doctors
- Pharmacists
- Falun Gong
- Naturopaths
- Homeopathy
- Traditional Chinese Medicine & Acupuncture
- Chiropractic
- Physiotherapy
- Osteopathy
- Massage Therapy
- Trager & Rolfing
- Reflexology
- Energy Therapies & Spiritual Practitioners
- Psychology & Counseling
- Yoga & Meditation Therapies
- Shamanism
- First Nation Traditions
- Herbalists
- Nutrition
- Pilates
- Reflexology
- Reiki
- Shiatsu, and miscellaneous practitioners

Important note: An estimated 100 CAM practitioners have not been included in this survey covering areas such as educators and teachers of dance, drama, theatre, art, and fitness and recreation specialists, etc.

9.2 Complementary and Alternative Medicine (CAM) services

71 different businesses are listed that offer health and wellness services in the area's of:

- Hair & Esthetic Studio's
- Massage studios
- Health & wellness retreats
- Fitness centres
- Miscellaneous health services
- First Nations health services
- Environmental organizations and associations
- Religious and spiritual organizations

An estimated 33 additional established CAM and health and wellness businesses that potentially could also serve HWT visitors have not been surveyed. As well, approximately 100 or more Yukon Government, First Nations service providers, and health and environmental services remain to be surveyed.

9.3 HWT related products and supplies

52 potential HWT product & supply companies were listed and include health food producers, organic bakeries, herb shops and agricultural farms, etc. This number is an estimated 40% of the total number of directly related HWT industry products and suppliers.

9.4 Recreation and adventure/wilderness tourism businesses and organizations

83 businesses are listed offering recreation and adventure/wilderness tourism services. The information was largely taken from a number of websites, including the *YTG, Tourism and Culture, Southern Lakes Marketing Cooperative, Wilderness Tourism Association of Yukon*, and the *Whitehorse Chamber of Commerce*. Considering the population concentration and its distribution in the territory on a regional basis, this may reflect an estimated 20% of the total number of businesses offering these types of services in the Yukon.

9.5 Accommodations

54 businesses are listed that offer accommodations, mostly in Whitehorse and the Southern Lakes Region. Considering population concentration and regional distribution, this list is estimated to reflect 20% of the total number of businesses offering accommodations in the Yukon. This percentage only refers to the number of businesses; it is not an estimate of the number of cabins, rental units, or beds.

9.6 Attractions and events

There are numerous attractions and events that could potentially play an important role in a Yukon HWT industry. Examples are the, *Klondyke Trail of '98 International Road Relay, Annual Yukon Wholistic Health Fair, Klondyke Harvest Fair, Fireweed Festival – Horticultural Fair, Annual Yukon Riverside Arts Festival, Atlin Arts & Music Festival* and the *Aroma Borealis Summer Workshops*, to name but a few.

Many health and wellness “businesses” are currently not involved in providing products and services to visitors. A comprehensive Yukon HWT inventory of assets should be inclusive of a wide range of experiences and modalities. Such an inclusive approach would be an acknowledgment of the Yukon’s diverse health, wellness and healing assets, of First Nations healing traditions, and the many other activities that can complement a Yukon HWT industry. An inclusive approach to product consideration under the HWT

banner would also contribute to the Yukon's destination appeal and confirm its uniqueness.

10. Potential Yukon HWT product clusters/packages

10.1 Background

This section discusses the potential for developing HWT products and service clusters/packages in the Yukon that could be accomplished in both the short term and the long term. Long-term considerations are especially relevant given the existence of a number of projects currently in the planning stage. These include the *Carcross/Tagish First Nations Four Mountains Resort* in Carcross (a major destination resort),⁶⁵ and Whitehorse's waterfront and downtown development initiatives ("Cultural Spaces on the Waterfront") and plans for programs like the 2005 "Arts and Cultural Street fest."⁶⁶ These two projects could make a significant contribution in terms of programming and services delivered in settings that can also provide appropriate facilities for the delivery of many HWT products.

The proposed product clusters described here are based on information and other material provided in previous sections of this study that are relevant to the Yukon's situation. Specifically, this section brings together information on:

- The HWT industry, as defined in the Yukon (Section 4)
- The limited amount of HWT related market research that is available for Canada, and the Yukon (Section 6)
- HWT trends that impact on the Yukon (Section 7)
- The Yukon's substantial HWT assets and a summary profile of potential HWT practitioners, businesses and organizations (Section 9)
- The key issues, priorities and operating principles that have to be taken into consideration in order to begin establishing a sustainable level of health and wellness tourism products and services in the Territory (Section 11)

The proposed "model" clusters take into account certain basic operating principles that are of critical importance given the Yukon's unique character, the contributions of First Nations, "northern lifestyles," existing HWT human resource assets, and, perhaps most especially, the Yukon's branding as a wilderness destination. These principles are based on evidence and information previously presented in this study, however they merit mentioning again:

- The fact that successful health and wellness tourism programs are responding to the growing consumer demands for fitness level improvement; for healthy lifestyle education and information; for nutrition counseling; for self-help healing

⁶⁵ www.fourmountainsresort.com

⁶⁶ www.yukonartscentre.org

practices; for preventative medicine; for solving personal problems like stress or depression; for convenient access to qualified holistic, naturopathic, alternative or eastern medicinal practices/therapies.

- The fact that the health tourism industry represents an ideal potential four-season tourism product—a goal that the territory strives to achieve and can better accomplish by diversifying its product line in ways that achieves product complementarity (i.e. sport tourism and HWT, adventure tourism and HWT, learning travel and HWT).
- The fact that the CTC and many international tourism organizations already are promoting and packaging a variety of health and wellness tourism activities in combination with festivals, with wilderness, adventure and eco-travel experiences, and with learning and holistic vacations in order to appeal to a broad range of travellers.
- The fact that the Canadian Tourism Commission is rapidly increasing its efforts to examine, develop, and promote the market for spa, health and wellness tourism and that the Yukon can take advantage of its mandate and efforts in this area.
- The fact that the Yukon’s health and wellness sector consists almost entirely of small or very small enterprises, and that there are currently no HWT destination or hotel products in the territory.
- The fact that the health and wellness tourist market in the Yukon context will consist almost entirely of those travellers who are already planning visits to the Yukon or Alaska, or are people who reside in the Yukon, Alaska and Northern B.C.

Where appropriate, the following brief descriptions of four HWT Cluster/packages being proposed in this study are illustrated with examples of existing or potential Yukon tourism products and HWT services.

10.2 Spa tourism

Spa tourism includes a wide range of spa facilities that can appeal to an equally broad range of potential visitors and clients. In this study’s review of spa categories (See Section 5) a number of spa types were identified that have some development potential in the Yukon. These include Club spas, Day spas, Destination spas, Mineral spring spas, and Hotel/B&B spas. Given the experience of other similar spa types in rural and wilderness settings, it is anticipated that the development of this HWT cluster would involve the spa facility entering into arrangements with private complementary and alternative medicine (CAM) practitioners to contract their services on an “as required” basis, or offer part-time and casual staff positions for these specialized and professionally delivered services.

There are CAM practitioners available in the Whitehorse area to provide many of the spa-type services normally found in the spa categories referred to above (see Appendix for a glossary and comprehensive list of spa services). Many spas combine traditional spa treatments with “hard” or “soft” outdoor, wilderness or adventure activities. Spa packages would include arrangements with other kinds of HWT-related businesses and organizations in the community as well as with public facilities such as the *Whitehorse Pool* and the *Takhini Hot Springs*.

10.3 The Complementary and Alternative Medicine (CAM) industry in the Yukon

The Yukon’s CAM sector consists almost entirely of independent practitioners and small businesses. Most of these practitioners operate home-based businesses or they share rental office space with other, similar, practitioners. As noted earlier, the downtown Whitehorse “New Cambodia” complex is quickly becoming a home for many CAM practitioners.

Section 9 presented the large and varied CAM industry that already exists in the Yukon and described how the existing and potential products could be marketed. In fact, this industry already is serving an indeterminate number of visitors. Most importantly perhaps, the CAM sector has the potential to provide the foundation upon which a Yukon spa, health and wellness industry could develop.

10.4 Conferences, educational programs, workshops, and festivals

Events such as conferences, educational programs and workshops, and festivals could be positioned as a major component within a Yukon HWT industry. Indeed, all of these activities are already well developed in the territory.

Nelson, BC’s *Summer of Learning* (see www.nelsonlearning.wvw) is but one example of the many small community organized events that combine health and wellness type products (similar to products that already are offered in the Yukon), and arts and cultural programming (again, similar to that which is already offered in the Yukon). These types of events could be organized as part of a well-planned Yukon HWT strategy.

For these events to succeed in small communities, they require certain essential organizational ingredients:

- They require an institutional facility such as a retreat type setting, or a college, university or art centre, that can help anchor the idea;
- They require appropriate support facilities, such as classrooms, dining areas, residences, auditoriums, etc; and
- Finally, they require ongoing educational/teaching programs that are related to the health and wellness theme.

These kinds of events can be timed to coincide with one or other of the many festivals, fairs and similar events that already occur on an annual basis, including the health and wellness related events that are increasingly popular and that attract more and more visitors each year (e.g., the Wholistic Health Fair in the fall).

See Appendix 7 for examples of currently offered packages that could be positioned as health and wellness tourism product in the Yukon.

10.5 Retreats, arts centres, and health and wellness centres

Retreats and other categories of health, wellness and spiritual centres are branching out to include an eclectic array of educational, self-help, wellness, and therapeutic offerings of a spiritual and secular nature. The development of such centres could become an important part of the Yukon's HWT industry, and also contribute to the promotion of related offerings that often fall under the umbrella of the "learning travel" special interest market.

There exist also related organizational models that could contribute substantially to the development of a unique Yukon health and wellness tourism industry. As described earlier in this study, private and non-profit arts centres and integrated health and wellness centres have already been established in many communities throughout Canada. They offer services to residents and to visitors alike. In part because of the existence of active and substantial arts and cultural industries in the territory, alongside its existing and planned facilities, there appears to be little in the way of preventing this sector of the economy to become an important player in a Yukon HWT industry.

11. HWT industry development issues and priorities in Canada and their relevance to the Yukon

11.1 Human resources, training and education, standards and certification

At the forefront of the development of the health and wellness tourism industry in Canada, one thing emerges as a priority: the HWT industry requires a more than average attention to professionalism. In part, this is due to the intimate nature of many of the services included in this tourism niche; services that impact on the physical and emotional/psychological/spiritual levels. For instance, these services include massage therapy and other treatments that require an acute attention to how people feel about their "personal space." Services also include activities that involve attention to emotional well being and which may require an attention to how "safe" people feel when sharing ideas, thoughts and feelings about those things that are most important to them at a deeply personal level. For these reasons, HWT must pay special attention to professionalism, both in terms of its overall approach, and in the delivery of its specific activities.

Despite the overwhelming consensus on the importance of these requirements, HWT is a relatively new industry, and one that is growing fast (as was previously mentioned, over

75% of all spas are less than ten years old).⁶⁷ Leaders in spa and wellness industry development claim that they are just now starting to strategically plan the infrastructure that will address issues that surround educational requirements, human resource development, and industry standards. This section of the feasibility study will provide information on the interconnected areas of human resources, training opportunities, professionalism and certification, and will discuss the key issues that surround their importance to this emerging industry. As well, this section will provide an analysis for how these issues impact the development of a HWT industry in the Yukon.

Human resources

In 2002, the *International Spa Association* commissioned a study on the North American spa industry. In that report, industry leaders highlighted the number one issue as the need for a trained labour market.⁶⁸ Related to this is the highly competitive job market for spa professionals given an acute shortage of qualified personnel.⁶⁹ As such, the CTC has identified HWT industry educational needs as a critical issue: one that needs to “better prepare individuals with transferable skills working with the spa, health and wellness tourism industry segment”⁷⁰

Training and education

One of the objectives for this feasibility study is to identify a number of training programs or professional development programs and institutions that are relevant to the development of a health and wellness tourism industry. Healing practices, or institutions that train health and wellness practitioners (i.e. massage therapists, acupuncturists, etc.), are, for the most part, not included in this section. Rather, this section attempts to highlight broad-based health and wellness training programs that feed into the development of the industry. Nonetheless, specific treatment oriented training institutions are taking a leadership role in defining professional standards. They are also involved in industry development in other areas (i.e., human resources). Therefore, certain key institutions of this nature have been identified.

National and provincial training opportunities

Each of the training institutes mentioned below, tourism or wellness treatment oriented, is contributing in some way to the development of a national HWT industry. They are contributing to the process of defining professional standards and codes of ethics, as well as identifying parameters for certification. These collaborations will help ensure that the highest caliber of human resources is available to move the industry forward.

⁶⁷ CTC (2004, December). “Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission.” Prepared by F. Verschuren, p. 10.

⁶⁸ From www.elmcrestcollege.com/about_elmcrest_college/message.asp

⁶⁹ CTC (2004, December). “Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission.” Prepared by F. Verschuren, p. 12.

⁷⁰ Ibid, p.13.

- *Elmcrest College*: The only accredited full service spa management school in Canada. www.elmcrestcollege.com
- *British Columbia Institute of Holistic Studies*: www.bcihs.ca
1-888-826-4722
- *Mount Royal Centre for Complementary Health Education*:
Continuing Education: www.mtroyal.ca/conted/cche
1-888-240-7203
- *International Spa Association (ISPA)* professional development workbooks
www.experienceispa.com
- *Emerit*: Canada's National Tourism Training Resource: www.emerit.ca
1-800-486-9158

For more information on these training institutes see Appendix 8.

Yukon tourism industry training opportunities

There exist a number of organizations that work on behalf of Yukon tourism initiatives. These include, for instance, Tourism Industry Association of the Yukon (TIAY) for industry advocacy and marketing, Wilderness Tourism Association of the Yukon (WTAY), and Yukon First Nations Tourism Association (YFNATA) for specific niche market product development initiatives and advocacy on issues that are of concern to tourism stakeholders, and Yukon Tourism Education Council (YTEC) for education and training. Currently, none of these organizations offers any training that is directly related to health and wellness tourism as a distinct niche market sector. However, certain health and wellness tourism products can be informed by general industry resources, or can be informed by training opportunities that exist for similar types of activities. For instance, herb walks can benefit from interpreter training programs (i.e., YTEC's heritage and natural history interpretation and guide training programs).

In addition to the above-mentioned tourism related organizations and training opportunities and resources, the Yukon Wholistic Health Network already offer health and wellness information and awareness building sessions, which include events that could incorporate activities related to health and wellness tourism development. Yukon College also offers a Tourism Studies and Management Program that may be able to include training for specific service delivery components that are related to HWT.

Foremost, current training related to specific HWT services/treatments/activities (i.e. herbalism, acupuncture, massage therapy, etc.) is usually undertaken outside the Yukon, and sometimes through distance education programs.

11.2 Professionalism and certification

Many of the activities and treatments included in the HWT abide by standards for training and service delivery set by professional bodies. These same professional bodies often offer their own certification programs (for instance, massage therapists can be certified through provincial massage therapy associations or federations, see for instance, Appendix 9). However, certification is not required to practice massage therapy, and some spa environments may offer services by non-certified practitioners. HWT leaders cite the rapid growth of this industry as one of the main challenges they face in ensuring that professional standards and qualification remain a priority. They discourage the use of non-professionally trained and non-certified practitioners (where certification is applicable).

To date, spas and wellness centers are not guided by any national criteria or standards. For example, Ontario offers an accredited training program,⁷¹ but Quebec does not. The following describes the key players in the development of HWT on a provincial, national, and international basis, and briefly summarizes their contributions HWT professionalism issues:

Provincial

L'association spas relais santé: www.spasrelaissante.com

The province of Quebec initiated a health tourism product club (CTC) in 1999 that has focused almost exclusively on market research and the development of spa standards. Currently the 17-member Quebec based consortium focuses on market research and the development of spa standards. *L'association spas relais santé* (www.spasrelaissante.com) has partnered with *Axelia* (www.axelia.ca) and a non-governmental association, le *Comité sectoriel de la main-d'oeuvre des services de soins corporels* to develop industry specific training programs. According to *Axelia*, the goal of their training programs is not to create uniform service delivery but rather to increase the amount of minimal knowledge required to perform services (thereby creating a minimum service requirement system). This type of training and standard system might work well for a Yukon HWT industry.

Membership into *Spas relais santé* is through an application process. This process ensures a level of service delivery compliant with the association's criteria. As well, members are subject to an anonymous inspection carried out by a *Spas relais santé* inspector.

Premier Spas of Ontario: www.premierspasofontario.ca

Premier Spas of Ontario is primarily a marketing consortium; however it has also developed a professional and rigorous quality assurance program: "As the professional

⁷¹ In fact, Ontario Registered Massage Therapists' accreditation is among the highest in the world, and their expertise is in high demand.

association of certified spas, our purpose is to maintain and monitor the highest operational and ethical spa standards among our members. We have established stringent criteria involving codes of ethics and conduct, quality control standards, health/wellness programs, public safety, hygienic facilities, and professional accreditation and department.”

Despite their provincial mandate, *Premier Spas of Ontario* are fulfilling an important leadership role in the development of the HWT industry on a national basis. They are endeavoring to:

- Grow a credible industry
- Develop standards for education curricula
- Educate the public about the health/wellness benefits of spa experiences
- Build credibility for preventive medicine
- Forge inter-governmental partnerships
- Direct industry research
- Develop cost-savings programs for members (advertising, insurance, products)
- Identify emerging issues for action

Membership into *Premier Spas of Ontario* is through an application process. This process ensures a level of service delivery compliant with the association’s criteria. To view a of the preliminary checklist form, see Appendix 10. (Note: The full Qualification Criteria is only available once the preliminary form has been reviewed by *Spas of Ontario*).

National

Leading Spas of Canada (Formerly Spa Canada): <http://www.spacanada.com/>

Leading Spas of Canada is “a national organization working together through member services, professional development, education, and marketing to support *The Leading Spas of Canada* as an international Spa Destination.”

The Leading Spas of Canada will direct the spa industry by:

- Building a national organization that supports its members from all regions of Canada
- Supporting professional development by implementing guidelines for standards and practices and education
- Increasing awareness of the enjoyment and benefits of the Canadian spa experience, in Canada and worldwide through its marketing programs
- Advocating for the spa industry within public and private sectors.

International

International Spa Association: <http://www.experienceispa.com/learn/resources.html>

“*The International Spa Association* is recognized worldwide as the professional association and voice of the spa industry, representing more than 2, 000 health and wellness facilities and providers in 63 countries. Members encompass the entire arena of the spa experience, from club spas, medical spas and mineral springs spas to service providers such as physicians, wellness instructors, nutritionists, massage therapists and product suppliers – fully representing the variety of wellness options in this exciting industry.”

See appendix 11 for more information on the above associations.

11.3 Industry standards, codes of ethics and best practices

Discussions that surround standards, codes of ethics and best practices in the health and wellness tourism industry to date are primarily focused on spa service delivery environments and issues that stem from spa type facilities. Nonetheless, these discussions provide important information about the general (national/international) context within which standards, codes of ethics and best practices are being considered for this industry.

Examples of emerging and established standards and codes of ethics for HWT are provided in Appendix 12.

Industry standards and codes of ethics

The CTC has identified a number of key issues that relate to standards and that impact upon Canada’s competitiveness with HWT product. They include the need to:

1. Increase the capacity of Canadian spa, health and wellness tourism operators to be globally competitive;
2. Identify competitive standards that separate the Canadian spa experience from international competitors;
3. Understand how Canada’s standards for spa, health and wellness tourism can also be linked to its “distinctiveness” as a destination.⁷²

As well, the CTC in collaboration with Human Resource Development Canada (HRDC), spa industry leaders, as well as a CTC task force set up in 2004, have identified a need to develop benchmark standards for hygiene, human resources, service and quality control.

⁷² CTC (2004). “Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission.” Verschuren, F. (Updated, December), p. 12.

Case study: Premier Spas of Ontario

All Premier Spas of Ontario must meet rigid quality standards, and are inspected regularly to ensure compliance with the following:

- The qualifications of treatment professionals must meet Provincial regulations and/or accredited professional associations.*
- Measures are taken by member spas to ensure that all therapists and aestheticians are registered and/or certified by their respective governing bodies. Therefore, all services and treatments must be given by certified personnel ONLY.*
- There must be at least five private rooms designated for the sole purpose of providing spa treatments.*
- There must be a full-time receptionist on duty during operational hours.*
- Members must provide a combination of different treatments in several different treatment areas (i.e. three or more Body Treatments such as: Massage Therapy; Reflexology; Shiatsu; Aromatherapy Massage; Lymphatic Drainage; Sports Massage Therapy; Thai Massage; Hot Stone Massage).*
- Resort or destination member spas must provide fitness facilities including at least one of: Supervised hiking and/or cycling; guided walks; aerobics; aquatics; weights; yoga; tai chi; stretch; pilates; guided relaxation; visualization techniques; meditation; stress relief; or breathing techniques.*
- One or more nutrition choices that demonstrate a commitment to healthy eating, healthy menu choices, vegetarian choices available, or hearts smart choices.*

Best practices

The CTC identifies the following best practice areas for the HWT industry:

- Levels of service
- Levels of facility development

- Levels of packaging
- Levels of market development
- Levels of profitability

Additionally, a survey of the HWT literature highlights a few best practice areas that complement those identified by the CTC. They include:

- **Eco-awareness:** Environmental attitudes are reflected in the values and practices that surround physical, emotional, psychological and spiritual well being. Therefore, the health of the environment should be a priority. This best practice

could prove to be especially important given the wilderness and natural setting that most, if not all, Yukon HWT products are or will be delivered in.

- Meals should be healthy and nutritious, and meal plan options should be made available to guests.
- Clearly indicated options for spa treatments and services delivery, i.e., indicate if treatments can be delivered by male or female therapists, and provide options for clients to select their preferences where possible.
- Clearly stated policies on children, smoking, nudity, shared or non-shared facilities.⁷³

The spa-goer is more knowledgeable about what she/he is seeking and is demanding better quality and consistency from the spa products and services they receive. Good service and a good treatment are no longer enough. The consumer expects a stress-free environment complete with spa treatment programs that cater to improved well being.

- CTC (2004). "Spa, Health and Wellness Tourism: A New Product Portfolio at the Canadian Tourism Commission." Verschuren, F. (Updated December), p. 8.

11.4 Relevance for the Yukon

The Yukon "spa" product along with its other related HWT products and services might not always easily fall into or adapt to the spa context discussed in the spa standards and codes of ethics statements described above. Nonetheless, as mentioned earlier, these can be useful for the Yukon HWT industry as guidelines and principles for product development, service delivery guidelines, and packaging directives. As well, they can serve to assist larger institutional bodies that are interested in providing HWT packages (i.e. hotels, B and B's, or ranches) that include a set of practices that attempt to match the standard principles laid out by larger spa related bodies and service delivery operators

⁷³ From Spa Lifestyle, March 12, 2005 downloaded from:
http://www.spafinder.com/Library/article_template.jsp?id=041118&pageNum=4&articleTitle=Spa%20Etiquette

elsewhere. In addition, a Yukon HWT needs to be aware of the fact that specific services offered under the HWT banner are often also subject to their own practitioners' Codes of Ethics or standards of practice (i.e. aromatherapy, massage therapy, etc.). Given the high regard for professionalism in many HWT service delivery areas, at some point, a mechanism to consider if existing standards for practitioners who participate in a HWT industry are being implemented might be useful.

11.5 Resources available for the development of standards, codes of ethics, and best practices

While the resources listed below are not specifically related to the HWT industry, they provide useful information – and can be used as models – for the development of HWT products.

- *Best Practices in Natural Heritage collaborations: Parks and Outdoor Tourism Operators*, CTC Product Development, September 2001.
- *Best Practices Tour 2000 in Adventure Travel and Ecotourism. Adventure Travel and Ecotourism Best Practices Tour 2000: Leading Ontario and Quebec Operators Share Their Exemplary Practices*, CTC, July 2000.
- *On the Path to Success: Lessons from Canadian Adventure Travel and Ecotourism Operators*, CTC, March 1999.
- *Catalogue of Exemplary Practices in Adventure Travel and Ecotourism*, CTC, March 1999.
- Yukon Tourism Education Council (YTEC) offers a number of different standards workbooks that can have some application for the HWT industry (i.e. guest services attendant, special events coordinator).

12. Core strategies, recommendations and next steps

This section proposes a number of interrelated core strategies to develop a Yukon HWT industry. It also makes specific research, product development, marketing and communications recommendations, and proposes next steps to follow-up this feasibility study and to implement the strategy. The recommendations have been divided into four thematic categories: Strategic Planning, Research, Specific HWT Product and Service Development, Market and Communications Development.

12.1 Strategic planning

1) This discussion paper and its recommendations should be reviewed by a selective number of potential stakeholders (tourism, health, education, private businesses, economy, etc.). First, they should be presented with the opportunities and challenges related to the development of a Yukon HWT, and second, their feedback should be solicited (through written communications and feedback, interviews, focus groups, etc.) in order to guide the recommendations set forth in this study. Developing a Yukon HWT industry will likely evolve most expeditiously if representatives from all of the potential HWT stakeholder groups are encouraged to work together from the very beginning.

2) A task force of stakeholders should be convened under the umbrella of an existing or new body, and collaborate with Yukon tourism organizations and any other interested community-based or private sector stakeholders that can or want to contribute to a vibrant Yukon HWT industry. Stakeholders could include the WTAY, YFNATA, TIAY, YTEC, N2K, Association Franco Yukonnaise AFY,⁷⁴ municipal, community and First Nations government economic development offices, the Yukon Wholistic Health Network, arts and culture organizations, and the Yukon College. It will be important to ensure from the beginning that host cultures — both First Nations and non-First Nations — are part of the Task Force’s discussions and the strategic planning process for the HWT industry.

One of the task force’s initial mandates should be to revise and consider the recommendations made in this study, as well as the written feedback that will have been received from potential HWT stakeholders described in recommendation number 1 above.

In addition, the task force mandate should endeavor to:

- A. Prepare a mission and vision statement for a Yukon HWT industry;
- B. Identify the expected benefits of this industry for the Yukon and its population. Some of the measurable benefits that should be emphasized include:
 - a) Increasing the mix of visitors to the Yukon in a way that will support the diversification of Yukon tourism products, and the sustainability of the tourism industry and the Territory’s general economy;
 - b) Creating jobs and other economic benefits in a wide range of services and products, together with a high proportion of quality positions in the areas of health and wellness (professional positions in complementary and alternative medicine);

⁷⁴ Through l’AFY’s *Développement Touristique* portfolio under *RDÉE Yukon*.

- c) Developing HWT and related infrastructure and increasing the choice of wellness options for visitors, and facilities and services that also will result in increased access to improved health and educational services to all Yukon residents.
- d) Encouraging the synergy that can be brought to this tourism initiative by recognizing the work and activities that are already being done by many related health and wellness businesses and organizations in the Yukon.⁷⁵

3) The YTG should request that a Yukon representative be appointed to the CTC’s Spa, Health and Wellness tourism task force so that there is a voice in a national forum that represent northern interests in this emerging niche market.

Such representation would help ensure that information is made available and incorporated into the Yukon HWT industry in a timely and coordinated manner. Having a member on the CTC task force also would provide them with information on how this niche market is evolving in the Yukon, and help ensure they are aware of how decisions being made in the territory might affect HWT industry development in other peripheral regions of Canada. While the Yukon’s HWT may not exclusively focus on spa type facilities, amenities, products and services, there remain many crosscutting issues that are important to the development of the HWT industry in the territory, and that may be of interest to other rural and wilderness settings that are not immediately reflected in the CTC task force’s current considerations.

12.2 Research

4) The Yukon should join, and collaborate, with the CTC to help develop HWT consumer and industry profiles for the Yukon and adjacent northern regions.

The CTC already has indicated that it is poised to embark on an extensive research program involving four important aspects of the national and international HWT sector:

What the CTC is doing...

The CTC will “investigate opportunities to undertake an updated national profile of the sector, seeking to reveal the spa, health and wellness tourism product's true size and scope, analyze its supply vs. demand situation, and comment on its financial health.”

⁷⁵ A strategic planning approach similar to that being followed in Hawaii is recommended; see Hawaii Tourism Authority, (2004). “Healing in Paradise. A strategy for Cultivating Health and Wellness Tourism in Haw’ai’i.” Global Advisory Services, (May).

On the consumer side, travel motivations and trend data for Canadian spa experiences need further clarification. Interpreting consumer data for the purposes of brand development, product positioning or product-to-market matching is needed. Opportunities to garner market segmentation research on Canadian, USA and select overseas countries should be explored (i.e. Germany, and other emerging European markets relevant to the Yukon and/or this product).

The CTC “plan to undertake a consumer segment crossover analysis to determine what relationships, if any, exist between travel interests of outdoor city, culture/heritage, cuisine and winter travel enthusiasts with spa travel opportunities. The CTC will also consider the completion of a foreign competitor profile to better understand how other countries are developing and marketing their spa, health and wellness tourism experiences.

We will seek opportunities to create linkages with known, established spa, health and wellness taskforces in other countries. Working with spa and tourism industry stakeholders like the provinces, regional development agencies, DMOs, and spa sector associations, the CTC will carry out research that captures incremental or customized data that is not readily available but is essential to making informed business decisions. This research will be disseminated to all sector stakeholders.”⁷⁶

5) The Yukon should participate in, and collaborate with whatever initiatives the CTC undertakes to work with Canadian spa, health and wellness tourism operators to:

- A. Increase the country's supply of market-ready tourism products and experiences. The focus will be on improving the quality and quantity of existing tourism products, and expanding the range of available products.
- B. Develop “benchmark standards” across Canada for hygiene, human resources, service, and quality control.
- C. Investigate a spa rating system for Canada in conjunction with the spa sector. Spa category definitions and ratings criteria will be developed to support a consumer-oriented spa ratings system. Included is an investigation of existing rating systems, which may be adapted to incorporate ratings for spa facilities, treatments and customer services.
- D. Undertake best practices reports designed to advise and educate health and wellness operators on product development or marketing issues relevant to their business environment.

⁷⁶ Ibid.

While the Yukon HWT product may be different from the national and international spa industry per se, the developmental circumstances and opportunities created by the overall newness of the industry will undoubtedly impact upon the Yukon. Industry activities on a national basis can assist the Yukon despite some of the local differences with products and overall tourism context.

6) The preliminary HWT industry product profile developed for this project should be expanded in terms of its coverage, its content, and its implications with the goal of further defining a Yukon HWT. The preliminary data collected for this feasibility study was crucial for an initial analysis of the HWT context in the territory. However, a more comprehensive database needs to be developed and analyzed in order to capture and catalogue the multiple attributes associated with specific products and services. The database's purpose also needs to be redefined and expanded to: (1) take into account the proposed CTC research, and (2) integrate the collected information into a web-based tool.

The web-based tool will support the optimal management of the HWT assets in the territory, and serve as a virtual centerpiece for HWT product and services development and for business support functions. This kind of tool also has significant and innovative marketing applications. To view one example of this kind of tool, see the *Hills Ranch* package building tool in appendix 13.⁷⁷ The HWT profile database could also support two additional functions; to inform the development of a Yukon HWT brand, and to assist with the marketing of this tourism sector.

12.3 Specific HWT product and service development recommendations

7) It is recommended that a specific product and service development and incubation system be established to implement the four main cluster/packages described in Section 9. Studies in other areas of Canada have emphasized that specialized resources need to be devoted to the development of high-quality health and wellness tourism products.⁷⁸

HWT products and services that are safe, ethical and credible guide risk management in the context of HWT. Because these product deal with people's emotional and physical well being, more attention must be paid to the quality of the product than is perhaps the case with other segments of the Yukon's visitor markets.

An important element that would help ensure the development of safe, ethical and credible products is the establishment of an incubation, or business development service. The function of the business development or incubation service would be to assist current health and wellness providers with their plans to target the visitor

⁷⁷ You can also try out the tool at www.spabc.com/html/treatments.html

⁷⁸ A strategic planning approach similar to that being followed in Hawaii is recommended; see Hawaii Tourism Authority, (2004). "Healing in Paradise. A strategy for Cultivating Health and Wellness Tourism in Haw' ai'i." Global Advisory Services, (May).

market. In other cases, the services provided also would include business incubator services for start-up enterprises and other interested individuals who are not currently providing services.

In other situations where the business development/incubator issue has been considered, the question has arisen whether this function should have a physical, or “bricks and mortar” location where people can go for services. The less-costly alternative is a so-called “virtual” incubator; a model where services are provided via telephone and computer.⁷⁹

The recommendation here is that the “bricks and mortar” model is preferable. An incubator/business development center offering only “virtual” services might be inadequate to meet the needs of smaller, grassroots type businesses and providers who may lack access to a computer or to the one-on-one help that would frequently be required by emerging entrepreneurs.

Business development services would be provided to better equip existing businesses or individuals who are looking to expand their health and wellness business into the visitor market. Another function would be to help existing or potential entrepreneurs define what are health and wellness assets and what healing modalities (e.g., tours, workshops, CAM practices, etc) could be part of a Yukon HWT sector.

This recommendation is made with the understanding that funding sources to establish and operate such a facility would need to be identified or that an existing Yukon organization or tourism service organization could provide these services. Typically the kinds of services provided by an incubator would include, for example, office space and shared facilities such as fax and photocopier machines, voicemail and mail services, business development services, access to sources of capital and networking. An excellent example of an existing potential business incubator in the Yukon is Däna Näye Ventures.

8) The Yukon should participate in, and collaborate with whatever initiatives the CTC is undertaking and work with other Canadian spa, health and wellness industry leaders to:

- A. Increase the country's supply of market-ready tourism products and experiences. The focus will be on improving the quality and quantity of existing tourism products, and expanding the range of available products;
- B. To develop “benchmark standards” across Canada for hygiene, human resources, service, and quality control.
- C. Investigate a spa rating system for Canada in conjunction with the spa sector. Spa category definitions and ratings criteria will be developed to support a consumer-oriented spa ratings system. Included is an

⁷⁹ Ibid.

investigation of existing rating systems, which may be adapted to incorporate ratings for spa facilities, treatments and customer services.

- D. Undertake best practices reports designed to advise and educate spa, and health and wellness operators on product development or marketing issues relevant to their business environment

9) The Yukon's HWT businesses should take advantage of the CTC's Tourism Innovation Partnerships Program to help build and to launch the HWT industry in the Territory.

10) An emerging Yukon HWT industry needs to coordinate its development through informed consideration of the issues addressed by provincial, national and international training institutes, and monitor and assess how the issues identified and addressed by these institutes and training facilities are relevant to the Yukon and the development of its HWT industry. Analysis and planning for how to adjust national issues to a Yukon context will also play a part in making this information and knowledge relevant for a Yukon HWT industry. This will also ensure that the Yukon remains as competitive as possible given its unique HWT service delivery capacity and product offerings.

11) Spa type service offerings in the Yukon should be encouraged to comply with evolving standards and codes of ethics as they emerge from other (e.g., Provincial) jurisdictions. Emerging standards in Ontario and Quebec in particular should be monitored and assessed for their applicability to the Yukon.

12.4 Market and Communications Development

1. 12) Carefully selected, and already well recognized "signature" products and services in what could be considered as the Yukon's emerging HWT should be included in the Yukon's current marketing programs. This effort would initiate a phased marketing rollout of the HWT industry, and be planned as part of an overall strategy to cultivate the industry in step with a comprehensive plan for business development and incubation, and the further development of a comprehensive HWT industry profile.

13) The links between HWT industry development in the Yukon, the Canada Winter Games, and the "Decade of Sport and Culture," need to be researched, and a plan of action to bring these complementary tourism arenas together should be developed and promoted.

14) The Yukon's already existing marketing programs should be used for promoting Health and Wellness Tourism products, e.g.,:

- A. The *Stay Another Day Program* should be revised to include health and wellness tourism products, services and activities (in its own section, or in boxes throughout the document).

- B. The *Yukon Art Adventures on Yukon Time* should be used as a model for a health and wellness product-marketing tool. In a similar booklet, products and services could be promoted for tourism purposes.

Other potentially effective and relevant marketing tools could include:

- C. A “Package Building Tool”: This would be linked to Yukon accommodations websites (especially) and visitors would select their HWT preferences as “add on” experiences to their Yukon stay.⁸⁰
- D. The “Destination Day Spa” (see section 8) is particularly well suited to one-day mini retreats that include education programs, fitness programs, and healthy meals, in addition to spa/beauty treatments. A Yukon HWT can benefit from creating a marketing program around this type of spa category.

15) Model, ready-made, HWT packages could be created, promoted and market-tested through Yukon Tourism’s web-based marketing materials and through external HWT-related web site. The suggested package models would be circulated to interested Yukon hotels/B& B’s and spas and CAM practitioners.

16) Once the draft has been circulated and feedback has been incorporated into a final version, a PDF version of this study should be mounted on the Yukon tourism website and/or other appropriate communications vehicle.

17) Informal “meet and greet” types of presentations and workshops should be held on a regular basis for potential stakeholders to examine:

- A. What is HWT and what is happening in the HWT market in other jurisdictions and in the Yukon.
- B. How organizations elsewhere are updating their strategies to accommodate this growing market trend.
- C. How to plan for the future of this industry in the Yukon, and how their business can participate and benefit from it.

⁸⁰ The “package building tool” found on the “Hills Health Ranch” website www.spabc.com could be used as a potential template for use in the Yukon. See also suggestions for building short Get-a-Way packages on www.ontariocanadatravel.com

- D. How to identify “aging well” community resources that can act as the foundation for developing and maintaining a health and wellness industry aimed at the fastest growing demographic segment of our society—“the well and the wealthy elderly.”
- E. How to address the need for standards and codes of ethics for tourism purposes (e.g., TIAY). Actions taken from these discussions should be considered for how they can (and should) impact the development of a Yukon HWT industry. Part of this discussion from an HWT standpoint would be to assess how best to apply emerging Yukon tourism standards and best practices to health and wellness products and service delivery.

This will also give stakeholders an opportunity to discuss:

- F. Future employment possibilities and to network with potential partners to develop HWT packages.
- G. Given the broad spectrum of non-spa type product offerings that may be considered as part of what defines Yukon health and wellness tourism, a voluntary code of ethics or a set of standards and practices could be developed and promoted through the Yukon Wholistic Health Network and/or through Yukon tourism associations where HWT products may complement or characterize current product offerings (i.e., WTAY or YFNTA).