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# Wellness Tourism in ASEAN Countries Among Aging Travelers Before and During the COVID-19 Era: Thailand's Perspectives

**Wilaipan Jaiwilai[1]* and Wipada Kunaviktikul[2]**

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## Abstract

This article discusses the worldwide aging phenomenon and the resulting aging tourists' travel patterns with special emphasis on the factors influencing their travel decisions. Specifically, the decline in wellness tourists caused by the COVID-19 pandemic is investigated to determine the most effective strategy and best practices to re-start the tourism industry once the pandemic subsides. Thailand's preparation activities to regain the tourism momentum post-COVID serve as a case study because of the country's strong innate potential for wellness tourism and because the effort to rebrand the country from low-cost to high-value including food spa and sports tourism was underway and gaining traction prior to the COVID-19 setbacks. Such potential is not unique to Thailand, but common to many ASEAN countries. The perspectives from this work can hence be applicable to other ASEAN members aspiring to use wellness tourism as a vehicle for recovering, rebranding, and rejuvenating their tourism industry towards a post-COVID goal that combines high-value tourism and sustainability. This furthers the work that ASEAN countries have done to collaborate on accomplishing a gradual and progressive reopening of the region while increasing cooperation and partnership.

**Keywords:** Aging Society, Wellness Tourism, COVID-19, ASEAN Tourism, Thailand Tourism

## Introduction

The COVID-19 pandemic has grinded global tourism to a halt. The shockwave is particularly felt in the ASEAN nations whose economies depend significantly on tourism. Bali, for example, has seen an unprecedented decline in international arrivals: from 6.2 million in 2019 to 45 in 2021 (Jamaluddin & Marcus, 2021). Navigating the path towards recovery from this cataclysmic moment requires not just a more-of-the-same approach to tourism, but rather a fresh shift in paradigm to pave the way towards sustainability. Wellness tourism presents such an opportunity for ASEAN economies. The strong growth in wellness tourism was becoming evident up to the moment before COVID-19 struck — globally, wellness tourism has grown at 8.1% CAGR from 2015-to 2017 according to the Global Wellness Institute (a US-based think-

[1] Graduate School of Tourism Management, National Institute of Development Administration, Thailand
[2] Professor & Vice President in Health Science Affairs, Panyapiwat Institute of Management, Thailand
* E-mail: wilaipan.jai@stu.nida.ac.th

tank; GWI), which is 50% larger than the 5.2% CAGR during the same period for overall tourism. Wellness tourism's unique resilience is evident, especially during the midst of the COVID-19 pandemic. Despite a global reduction of 74% in year-on-year international arrivals in 2020 (UNWTO, n.d.), the global shrinkage of the wellness tourism sector remained comparatively small at 40% year-on-year (Global Wellness Institute, 2021).

In ASEAN, according to the World Travel & Tourism Council, the tourism industry contributed $393.1 billion USD to Southeast Asia's GDP in 2019, nearly doubling the $197.3 billion USD it provided in 2010. In 2019, tourism accounted for about a third of Cambodia's GDP, and around 20% in Thailand. However, the travel industry was one of the hardest damaged when international travel came to a standstill in 2020 (Vadakan, 2021). Yet, GWI predicted that wellness tourism is expected to rise substantially in the coming years as the world recovers from the pandemic at an estimated +20.9 percent annual growth, with the market reaching $1.1 trillion in 2025 (Global Wellness Institute, 2021).

To increase the industry's sustainability after COVID-19, ASEAN tourism destinations should prepare themselves by rebranding and shifting from low-cost tourism to high-value tourism to gain tourists from other niche markets. A popular research trend is the world's aging society, which is fueled by medical progress that extends people's lives from an average of 80 years to 90-100 years. The world's life expectancy has improved dramatically while, simultaneously, in several countries, the birth rate has been increasing tremendously. Based on these trends, aging tourism should be a focus of current and future research as the geriatric tourist market and possibilities for tourism consumption are enormous and the prospective improvements to older adult wellbeing tourism are beneficial to overall older adult health.

Similar to the global tourism situation, tourism in the ASEAN region has been negatively impacted by the COVID-19 crisis. A literature review of the current situation regarding COVID-19's effect on tourism, aging society, wellness tourism, and related issues was conducted with an aim toward the preparation of aging tourism within the wellness business in Thailand's Perspectives as well as guidelines for the development of wellness tourism for older adults, and how the case study in Thailand can be adapted in other ASEAN countries in a post-COVID era.

## Definitions of Population Aging and Aging Society

According to the UN report on World Population Aging: 1950-2050, "Population aging" is "The process by which older individuals become a proportionally larger share of the total population". The Encyclopedia of Population defines population aging as "Aging of the population is a summary term for shifts in the age distribution (i.e., age structure) of a population toward older ages." The Encyclopedia of Population mentioned that increases in the percentage of older adults of retirement age are frequently used to gauge population aging, and perhaps the most often used indicator is median age, which is defined as the age at which half of the population is older and the other half is younger. Additionally, the old-age dependency ratio (the number of individuals of retirement age compared to the number of those of working ages) is employed as a related measure of population aging, since the study of population aging is often driven by a concern for its burdening of retirement systems (Scherbov & Sanderson, 2019).

The United Nations defines older adults as individuals who are 60 years or older. It is frequently characterized as 65 and above.

Demographic definitions are used to cate an "Aging Society" - a population that is getting older as indicated by the proportion of older adults to the total population that is steadily increasing (Foundation of Thai Gerontology Research and Development Institute, 2021) - into;

1. "Aged society" - a population in which the proportion of people aged 60 and up surpasses 10% of the total population (or a population in which 7% of the population is 65 and up)
2. "Complete-aged society" - a population in which the proportion of people aged 60 and over surpasses 20% (or a population in which 14% of people are 65 and up)
3. "Super-aged society" - a population in which the proportion of people aged 60 or older is greater than 28% (or a population in which 20% of people are 65 and up)

## Global Aging Society Trend

According to the Future Trend of Aging Society, 2020-2021 in the Future Lab Forum 2019 by Baramizi Lab (Trend and Future Concept Research Lab), one of the megatrends in global demographics is that of the "Aging Society." The United Nations reported that currently the over 60-year-old population accounts for around 11.11% globally, and by 2050 this number is expected to reach 20% (Assarut, 2019). The United Nations also predicted that, by 2050, one in every six persons on the planet will be over the age of 65 (16%), up from one in every eleven in 2019 (9%). One in every four people in Europe and North America could be 65 or older by 2050. For the very first time in history, people aged 65 and up outnumbered children under the age of five on a global level in 2018. The number of people aged 80 and up is expected to triple from 143 million in 2019 to 426 million in 2050.

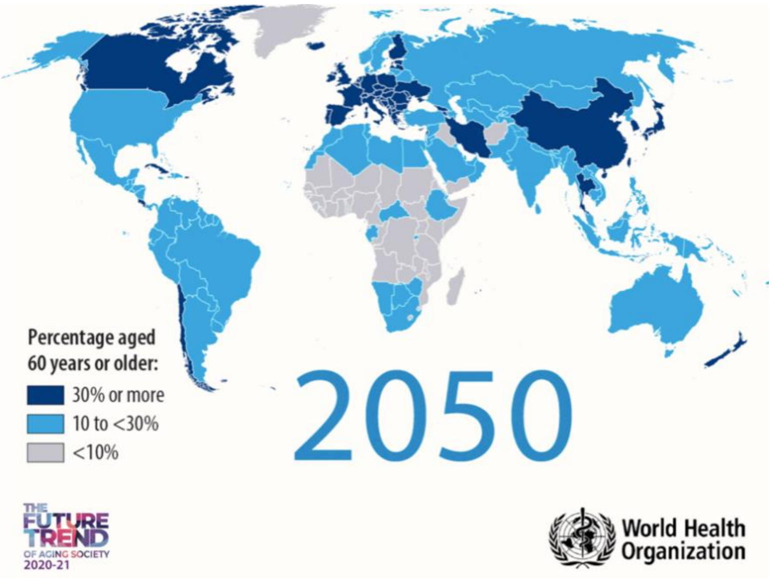


**Figure 1** Percentage Aged 60 Years or Older in 2050 by Location
(United Nations, n.d.)

As the older adult population has increased dramatically, one of the challenges is the increased need for care within the older population. As such, there will be a huge opportunity for entrepreneurs to expand their market or business to serve the needs of this population, such as innovations for a better life in several dimensions including the social, economic, and physical environment.

## Aging Travelers' Behavior

The Baby Boomers, commonly defined as those born between 1946 and 1964, are 12 times wealthier than Millennials according to the analysis of US Federal Reserve's data (Ellis, 2019). They have more free time, especially those who have already retired, and life expectancy has increased dramatically in recent decades. According to World Bank and World Health Organization (WHO) statistics, the global life expectancy is 72.6 years in 2020, which is 20 years longer than in 1960 (World Health Organization, n.d.).

When it comes to the economic value of the older adult market, the WHO predicts that people aged over 60 will increase at least three percent each year. In 2017, the global aging population was around 963 million people, accounting for 13 percent of the global population, with an estimated 1,400 million people aged 60 and over by 2030 and 2,000 million people in 2050. This increase has resulted in the emergence of an aging economy known as the "Silver Economy" (Maifeay, 2021).

The silver economy encompasses all economic activities, products, and services designed to meet the needs of people over the age of 50. This principle, derived from the so-called silver market that emerged in Japan — the country with the largest percentage of people over 65 — during the 1970s to refer to the senior market, draws together sectors as varied as health, banking, automotive, energy, housing, telecommunications, leisure, and tourism, among others.

**Table 1** The World's Most Aging Countries by Population Reference Bureau (2019)

| Counties | % Of the Total Population Over 65 Year |
|---|---|
| 1. Japan | 28.2 |
| 2. Italy | 22.8 |
| 3. Finland | 21.9 |
| 4. Portugal | 21.8 |
| 5. Greece | 21.8 |
| 6. Germany | 21.4 |
| 7. Bulgaria | 21.3 |
| 8. Croatia | 20.4 |
| 9. France | 20.3 |
| 10. Latvia | 20.3 |

The characteristics that best describe silver economy consumers, as observed by Iberdrola, a Spanish multinational electric utility company (Iberdrola, 2022), are the following.

- They have strong purchasing power and are not burdened by financial obligations.
- They spend their time doing things they've always wanted to do: travel, try new things, spoil themselves, and so on.
- They are energetic people who enjoy taking care of themselves, participating in sports, eating well, dressing well, and having fun.
- They are brand loyal, consume more than young people, and demand more personalized and individualized products and services.
- They have more free time and enjoy filling it with cultural and recreational pursuits.

Maifeay, 2021 found that older adults' behavior and lifestyle have been changing, especially during the past two decades; their current and future needs are different from before. For this reason, entrepreneurs should learn and understand their insights and needs, and prepare for businesses to adapt to serve this potential niche market. In addition, the current older adult population is known as "Young Old," meaning they are older adults who are young at heart and still in good health (in Japan, they are called "YOLD"). This group of consumers, especially in developed countries, are much healthier and have longer expected lifespans than ever before. As consumers, they tend to have higher income, a larger fraction of discretionary spending, and a willingness to spend toward a luxury lifestyle. Entrepreneurs who want to enter the older adult market may consider Business to Customer (B2C), or Business to Business (B2B) models in the following business: food and beverage, anti-aging products and services, shops for older adults, accommodation-related businesses for older adults, teaching online media skills, internet-related businesses, health technology, wellness tourism and pet-related businesses (Maifeay, 2021).

## Wellness Tourism

The Global Wellness Institute or GWI (Global Wellness Institute, 2021) defines Wellness Tourism as "Travel associated with the pursuit of maintaining or enhancing one's wellbeing." With so many maladies embedded in today's travel, wellness tourism carries the potential of combating those negative qualities and transforming travel into an opportunity to sustain and enhance our wellbeing. There is a distinct difference between wellness tourism and medical tourism. GWI differentiates them in the following figure;

**Table 2** The Difference between Wellness Tourism and Medical Tourism

| | |
|---|---|
| **Reactive** | **Medical Tourism** |
| | Travel to receive treatment for a diagnosed disease, ailment, or condition, or to seek enhancement. |
| | Motivated by the desire for lower cost of care, higher quality care, better access to care, and/or care not available at home. |
| | Activities are reactive to illnesses, medically necessary, invasive, and/or overseen by a doctor. |
| **Proactive** | **Wellness Tourism** |
| | Travel to maintain, manage, or improve health and wellbeing. |
| | Motivated by the desire for healthy living, disease prevention, stress reduction, management of poor lifestyle habits, and/or authentic experiences. |
| | Activities are proactive, voluntary, non-invasive, and non-medical in nature. |

Regarding wellness travelers, GWI clarifies that there is a widespread misconception that wellness tourists are a small, privileged and wealthy group of leisure tourists who visit destination spas, health resorts, or yoga and meditation retreats. In reality, wellness travelers are a much larger and more diverse group of consumers with a wide range of motivations, interests, and values (Global Wellness Institute, 2021). According to GWI, wellness travelers can be categorized into two types, though both sets of activities may be undertaken by the same person on separate trips, and these two types of wellness travel complement one another. The two types include:

● Primary wellness traveler: A traveler whose trip or destination selection is primarily motivated by their aim to enhance their wellbeing.

● Secondary wellness traveler: A traveler who focuses on maintaining wellness while traveling or engages in wellness experiences while on any type of trip, whether for pleasure or business.

The GWI report also mentions that both types of wellness tourists will find something special in any destination. Every destination has its own characteristics when it comes to wellness, which is influenced by the local culture, natural resources, meals, and other factors. Indigenous healing practices, ancient/spiritual traditions, native plants and forests, special muds, minerals, and waters, vernacular architecture, street vibes, local ingredients and culinary traditions, history and culture, and so on, can all be incorporated into these one-of-a-kind and authentic experiences. Since each location is unique, wellness tourists will always discover something new to appreciate.

**Table 3** Every Destination has Something Unique to Offer

| **Counties** | **Destination** |
|---|---|
| 1. Colorado | Hiking & Mountain |
| 2. New York | Urban Healthy Hotel & Spas |
| 3. California | Weight Loss & Detox retreats |
| 4. Arizona | Destination Spas |
| 5. Mexico | Temazcal Beach resort spas |
| 6. Caribbean | Wellness cruises |
| 7. Costa Rica, Belize | Rain Forest Spa Retreats |
| 8. Argentina, Chile | Thermal Resorts |
| 9. Brazil | Thermal Waterparks |
| 10. Zambla | Walking Yoga Safaris |
| 11. Kenya, Tanzania, Botswana | Safari Spas |
| 12. South Africa | Health Hydros Yoga & Wine Retreats |
| 13. Australia | Surf & Yoga Retreats |
| 14. New Zealand | Hot Springs |
| 15. India | Meditation, Yoga, Ayurveda Retreats |
| 16. Malaysia, Thailand | Executive Checkups |
| 17. Japan | Onsen Supersento |
| 18. Korea | Jjimjilbang |
| 19. China | Hot Spring Resorts, TCM |
| 20. Russia | Sanatoria Banya |

**Table 3** Every Destination has Something Unique to Offer (Cont.)

| Counties | Destination |
|---|---|
| 21. Germany | Climatic health resorts |
| 22. Turkey | Turkish Baths |
| 23. Finland | Sauna |
| 24. Norway | Nordic Wellness |
| 25. UK | Weekend Wellness Retreats & Bootcamps |
| 26. Austria | Alpine Wellness Hotels |
| 27. France | Thalassotherapy |
| 28. Morocco | Thermal Hammams |
| 29. Egypt | Sand Baths |
| 30. Israel | Dead Sea Spa Resort |

Wellness tourism in Asia has a high potential. GWI reported that in 2017 Asian countries accounted for 15% of the global healthcare tourism market. Thailand, Singapore, India, the Philippines, and Malaysia, in that order, play a key role in offering health tourism. When comparing the country's health market share to Asia's total health market share, Thailand takes the lead with 38%, followed by Singapore with 33% (Chusri & Lalitsasivimol, 2020). The GWI report shows that the wellness tourism market in Asia, especially in ASEAN countries, tends to grow positively.

Tanupol Virunhagarun, Chief Operating Officer and Director of Bangkok Dusit Medical Services (BDMS — Thailand's largest private healthcare group) Wellness Clinic, noted that wellness tourism is the new "unicorn" of Thai tourism, even during and after COVID-19. This is because wellness tourists are primarily healthy people seeking to proactively take care of their health, and hence they will travel further and engage in a wider range of health-conscious activities than sick people, who invariably seek the nearest possible remedy for their malady. Wellness tourists want to go out to dine, travel, exercise, use spa services and enjoy a Thai massage. Whether it is through food or a physical examination, stress-reduction services can help them change their health habits. This is proactive health care rather than reactive health care (Thairath Online, 2021).

Kasikorn Research Center claims that, in 2019, 3.6 million visitors came to Thailand for medical tourism purposes, contributed 41,000 million Thai Baht to the economy, and helped to employ more than 9,000 local people. For wellness tourism, 12.5 million visitors-trips came to Thailand and contributed 400,000 million Thai Baht and helped to employ over 530,000 local people (Thairath Online, 2021).

Phudit Tejativaddhana, Director of the ASEAN Institute for Health Development at Mahidol University (AIHD), added that "Wellness" and "Wellness Economy" are different. Alternative activities and lifestyles that promote holistic health are referred to as "wellness". Good physical and mental health, a healthy society, and a healthy environment are all important factors of wellness, while the "Wellness Economy" is a business that allows individuals to incorporate healthy activities and lifestyles into their daily lives.

## Older Adult Tourists and Wellness Tourism

Regarding older adult travelers and wellness tourism, older adult traveler behavior is different from common travelers because they focus more on the satisfaction of travel and services, safety, quality, and value; they have purchasing power; and their purchase decisions are based more on reason, not an emotion at whim. However, they may suffer from some health limitations. These limitations are what entrepreneurs should consider and adapt their business models in order to welcome the older adult market. Older adults will soon be the primary group of travelers consisting of healthy couples and single individuals with significant disposable income, plenty of time, and a strong desire to travel and meet or make friends. Mostly they spend their time after retirement on vocational activities or travel, making them high-quality travelers. Wellness tourism, as well as medical tourism, such as spa services, medical checkup services, exercise activities, and choices of healthy foods and beverages, attracts older adult travelers and are good for their physical and mental health. Therefore, wellness tourism businesses should prepare themselves to serve their needs in the very near future (Maifeay, 2021).

The Kasikorn Research Center reveals that, according to the Office of Small and Medium Enterprises (SMEs) Promotion report in 2014, the expenses of older adults are classified into two categories: health-related expenses, which include the cost of maintaining health care when sick, Thai traditional spa massage, healthy food and beverages and services in a care facility for older adults and leisure activities for relaxation, such as tour packages, making merit, entertainment and goods purchasing (Kasikorn Research Center, 2017). Wellness is a top priority for older adult tourists and the wellness tourism industry is on the path to success.

Traveling on special holidays is popular among Thai older adult tourists; the goal of the trip is to revitalize their body and mind, as opposed to foreign older adult tourists, whose goal is to enjoy and experience nature. In terms of wellness tourism, this is not only hotel stays or sightseeing, but also includes spa treatments, sporting events, food, etc. The specific services are described in detail below.

### Health Spa Services

Health spa services are widespread, and Thailand is well-known for them. According to the Kasikorn Research Center, revenue from spas, massages, and spa items reached 31 billion THB in 2015 (Kasikorn Research Center, 2017) and the services were particularly popular among older travelers. The health spa service model has integrated Thai culture and wisdom with elements of a health spa in terms of form, taste, smell, sound, and touch (Klunklin, et al., 2021). Travelers may spend their time on health-promotion services such as spas and Thai massages. Foreign tourists prefer Thai spas for a variety of reasons, including the use of aromatherapy for relaxation, service sites that use sound and light to reduce customer stress, and relaxing tools or services such as water therapy and natural hot springs. For example, Scandinavian older adult tourists were satisfied with the spa tourism business and Thai massage and fitness and relaxation centers in Pattaya and there is a trend toward holistic healthcare in the future, incorporating massage, skin treatment, nutrition therapy, counseling, movement and exercise and meditation (Wisnom & Capozio, 2012).

### Healthy Food and Beverages

Consumers are focusing on health care and eating nutritious foods. As a result, there are food-related health tourism services, such as organizing a variety of foods, such as herbal cuisine, vegetarian food, food produced from fresh fruit, and meals prepared using locally grown vegetables as raw materials. The presentation highlights the distinct flavor of each region's cuisine, increasing the number of meal options available. Additionally, consumer experience can be further enhanced by adopting the concept of slow tourism — avoiding fast food and engaging more in immersive local culinary heritage, as well as offering wellness tourism services such as health-focused cooking activities as a part of tourism activities (Suanpang, 2016). Also featured are food and leisure services that incorporate eating into the relaxing process, such as the "Kin Kao Saao Huen" activity (literally "eat rice [and] rest [in the] house" — roughly translated to B&B service in the Northeastern Thai dialect), which is one of the touristic activities established for health promotion for older visitors based on the Mekong River Basin health culture. Older travelers were found to be the happiest and most satisfied with the service (Trumikaborworn & Apinandacha, 2016).

**Sport Activities**

Older adult travelers hope to feel vitality and rejuvenation while relaxing their body and mind through a variety of sports activities such as golf, yoga, or sporting events such as jogging, biking, and so on (Thaipost, 2017). Before COVID-19, sport-driven tourism was popular among senior citizens and various events were accommodating to them, e.g., natural trail hikes, biking, golfing competitions, and even a marathon, all of which focused on both competing and enjoying nature. Mainstream sporting events such as the Chombueng Marathon in Ratchaburi (a famous Thai annual marathon organized since ca. 1985) have witnessed participants as senior as 95 (Thai Health Promotion Foundation, 2010).

Sports tourism refers to three types of tourism that include travelers participating in sports while on vacation; 1. Sports event tourism, 2. Celebrity and nostalgia sport tourism and 3. Active sports tourism (Gibson, 2006). Sports tourism is becoming increasingly popular among older adult tourists, not simply among adults and teens. At a marathon event in Manal, India in 2012, for example, 180 senior international racers participated, which has brought the spotlight onto sports tourism (Times of India, 2012). Moreover, biking is another popular type of sports tourism among older adults as they can enjoy natural sightseeing during their exercise. For example, the Taiwan Tourism Bureau arranged and promoted bicycle tourism by planning ten beautiful biking routes, and they found that cycling tours are highly popular among older adults, which is the age at which they are ready, in terms of both time and money, to join a bicycle tour that is both good for their health and good for their appreciation of nature (Tourism Bureau, Republic of China (Taiwan), 2022).

## Wellness Tourism Situation Pre-COVID and Post-COVID

The ASEAN region, like other places, has been damaged by COVID-19. The Center for Statistic and International Studies, or CSIS, investigated the COVID-19 situation in ASEAN countries, compared to the world, China and USA, in February 2022, as follows

**Table 4** COVID-19 Situation in ASEAN, Compared to the World, China, and the USA, 28 February 2022

| Country | Cases (Million) | Cases Last 24hr | Deaths | Total Fully Vaccinated | Percent Fully Vaccinated (%) | Cases per Million |
|---|---|---|---|---|---|---|
| **World** | 432,127,008 | 1,619,729 | 5,932,306 | 4,373,402,508 | 56.1 | 55,401 |
| **China** | 147,576 | 6,556 | 5,133 | 1,234,540,000 | 85.8 | 103 |
| **USA** | 78,809,456 | 65,138 | 945,242 | 214,746,544 | 64.9 | 238,093 |
| **Indonesia** | 5,457,775 | 49,447 | 147,586 | 143778623 | 53.6 | 20,365 |
| **Philippines** | 3,658,892 | 1,550 | 56,224 | 63,091,847 | 60.1 | 34,880 |
| **Vietnam** | 3,120,301 | 78,795 | 39,962 | 76,783,305 | 80.4 | 35,660 |
| **Thailand** | 2,819,282 | 24,932 | 22,809 | 49,646,601 | 71.5 | 40,624 |

**Table 4** COVID-19 Situation in ASEAN, Compared to the World, China, and the USA, 28 February 2022 (Cont.)

| Country | Cases (Million) | Cases Last 24hr | Deaths | Total Fully Vaccinated | Percent Fully Vaccinated (%) | Cases per Million |
|---|---|---|---|---|---|---|
| **Myanmar** | 581,837 | 3,391 | 19,356 | 20,919,933 | 39.2 | 10,902 |
| **Malaysia** | 3,367,871 | 62,714 | 32,591 | 25,749,085 | 82.5 | 107,945 |
| **Cambodia** | 129,078 | 479 | 3,027 | 13,841,557 | 86.5 | 8,062 |
| **Laos** | 142,237 | 304 | 619 | 4,294,399 | 58.3 | 19,313 |
| **Singapore** | 679,795 | 18,597 | 986 | 4,898,322 | 87.3 | 121,132 |
| **Timor Leste** | 22,584 | 0 | 126 | 571,418 | 42.6 | 16,855 |
| **Brunei** | 51,516 | 3,461 | 115 | 404,301 | 94.3 | 120,194 |

According to GWI, given the widespread travel disruptions during the outbreak, the wellness tourism sector shrank from $720 billion in 2019 to $436 billion in 2020, and domestic and global wellness excursions totaled more than $600 million in 2020, down from $936 million in 2019. As the world recovers from the pandemic, GWI predicts that wellness tourism will increase significantly in the future years (+20.9 percent annual growth), with the market reaching $1.1 trillion in 2025.

GWI forecasts that the healthcare segment is expected to grow again and expand among consumers. Amid the COVID-19 pandemic, the growth of healthcare continues to be attractive among the middle class, older adults, those with chronic diseases, and health-conscious consumers. The COVID-19 pandemic has resulted in significant shifts in health mobility such as promoting a healthy atmosphere, a desire to learn more about mental health and well-being, and rethinking the work-life balance, with a focus on environmental sustainability. The global health industry is expected to increase at a rate of up to 9.9% annually during the next five years. The rate of increase will be far faster than the global economic growth forecast. Additionally, healthcare will be worth $5 trillion in 2021 and $7 trillion in 2025 once the COVID-19 pandemic has passed. The three products with the largest growth compared to the total global output are notably concentrated in wellness: health tourism, mineral spring bathing, and spa business at 20.9%, 18.1%, and 17.2%, respectively (Global Wellness Institute, 2021).

In Thailand, the Ministry of Tourism and Sports is attempting to open the country to tourists in order to improve the tourism sector's income, but traditional tourism is also dependent on the number of visitors. The benefits of tourism are not worth destroying natural resources. The way we think about the world has shifted in recent years. COVID-19 spread all over the world after it was discovered. People across the world are becoming increasingly aware of their health, as they have never been before. Therefore, wellness tourism has the prospective to become a high-earning industry in the very near future. As Thailand has strong potential in both medical and wellness tourism, Thailand will benefit greatly from health-conscious travelers from all over the world if they are linked together. The typical tourism income is many times greater (Thairath Online, 2021).

### Wellness Tourism Recovery Practices and Guidelines for Thailand and the ASEAN Region

Phudit Tejativaddhana of the ASEAN Institute for Health Development (AIHD) divides the wellness industry into two categories according to the nature of the service: internal and external health care services. The former covers personal preventive medicine, comprising dietary supplements and alternative treatments, as well as healthy nutrition advice services. The latter covers spas, massages, and wellness tourism, where wellness-related activities are more expensive than regular activities, as tourists agree to pay for their individualized experiences

(Thairath Online, 2021). In addition to the proactive wellness tourism, Thailand attracts reactive medical visitors from developed countries with high-quality health care at a fraction of the cost, which will further spill over into the general wellness segment once the patient recovers (and perhaps becomes more health-conscious).

For these reasons, it is a great opportunity for ASEAN countries to prepare to welcome foreign wellness travelers again after COVID-19. On 19th January, Cambodia organized the 25th Meeting of the ASEAN Tourism Ministers at the seaside tourist town of Sihanoukville. Amid the COVID-19 pandemic, the industry has to be revitalized. Ministers of tourism from ASEAN countries were not only upbeat about the reopening but also expected that the industry will rebound with better resilience and sustainability. For fear of being left behind in the global fight for tourism dollars, ASEAN has committed to boosting cooperation and working more closely to ensure the region's slow and steady reopening. As vaccinations are rolled out across ASEAN, several ideas involve a standardized COVID-19 immunization recognition system (such as the internationally recognized Vaccine Passport, including those with a centralized digital verification system). Other initiatives include an ASEAN safe tourism travel stamp to reassure ASEAN visitors of cleanliness and safety standards (such as Thailand's SHA Plus scheme), increased digitalization of ASEAN tourism, the strengthening of data and information networks, and the promotion of connectivity and travel facilitation to and within ASEAN (Lin, 2022).

As part of the plan to support tourism recovery, Cambodia's Minister of Tourism announced the adoption of the New ASEAN Tourism Logo and the ASEAN Safe Travel Stamp "Safe and Warm" (Ross, 2022). Innovative certification schemes such as this may play a key role in building consumers' confidence in embarking on a new journey to ASEAN nations for wellness tourism, thereby helping penetrate a new and untapped segment of the target group.

According to a Bangkok Bank report year 2021 on developing wellness tourism in Thailand, it is suggested that entrepreneurs may create a new format, or adapt their services, for example, using products containing locally sourced herbs, natural sound therapy, aromatherapy, thalassotherapy, mud therapy and so on, to provide customers with memorable experiences. Hotels can also reach out to their customers and continue to create added value from health-related services by offering various related activities, or they could collaborate with other local companies to offer a variety of activities during tour stays. Alternatively, they may start a different service model out of an old one (Bangkok Bank SME, 2021).

## Guidelines for the Development of Wellness Tourism for Older Adult Tourists, A Thai Perspective

It is critical to have a thorough awareness of, and access to, products and services. Today's older adults have radically different attitudes and actions than previous generations. For entrepreneurs who define older adults as their target market, the key to success is a thorough awareness of their demands. This includes increasing the accessibility of products and services to older adults, as well as their convenience in accessing goods and services using quality, pricing, and usability to impress those who purchase items or services.

In addition, because the traditional marketing notion of market segmentation based on age alone is insufficient to comprehend all client behaviors, marketers should pay greater attention to older adult behavior by utilizing current marketing tools such as free and paid monitoring and listening tools. Further, amid the COVID-19 outbreak, where safety requirements are a primary focus, operators must adapt to the behavior of tourists, for example, hotels should pass the Amazing Thailand Safety and Health Administration (SHA) standard, and entrepreneurs must have strict policies for COVID-19, or they may have to halt their services temporarily and prepare the facility and services for future revenue.

According to Sustainable Tourism after COVID-19 Insights and Recommendations for Asia and the Pacific report by the Asian Development Bank (2021), tourism has played a significant part in Thailand's economic growth, with a 485% rise in visitor arrivals from 1997 to 2019. Growth and development, on the other hand, have been concentrated in a few areas of the country, and gains have not been dispersed equitably. As the country restructures its tourist business, the transition from reaction to long-term recovery should include a mindset shift; a good place to live is always a good place to visit, not the other way around.

One of the ways to achieve this is by rebranding. Thai tourism is frequently linked with low-cost vacations. While it is still a significant issue of discussion, many people feel the country should focus on high-spending guests and promote sustainability. For instance, with 10 million visits in 2018, Chinese tourists have become Thailand’s largest market. However, their average per-person spending in Thailand ($2,026 USD) is less than in the United States ($4,462 USD), Japan ($3,000 USD), and the Republic of Korea ($4,000 USD). Before the pandemic, Thailand's tourist industry attempted to address this by rebranding and diversifying offerings in order to attract higher-spending luxury customers. Thailand has begun to introduce community-based tourism in the form of visiting rural areas, in addition to focusing on high-end markets. Over 180 towns in Thailand currently provide cultural experiences to guests interested in learning about Thai traditions. With the variety of tourism offers, attempts are still being made to find effective strategies to develop a long-term tourism brand for Thailand, as well as to define what exactly defines a sustainable brand (Asian Development Bank, 2021). Consequently, the entrepreneurs and policymakers, with support from the government, may rebrand Thai tourism by setting wellness tourism as a tool to appeal to high-spending customers, especially international and domestic older adult travelers. By doing this, Thailand can enjoy more spending from each traveler, more sustainably, with less harm to natural resources.

## Conclusion

Aging traveler is an emerging global trend that starts to have an acute impact on ASEAN tourism and even more so in the post-COVID Era. A careful analysis of factors underlying the cohort’s demand underpins a proactive strategy: they tend to spend more money on their travel and leisure due to several factors, chiefly that they have a large amount of disposable income and free time for personal recreation. As such, now is a cusp of great opportunity for the tourism industry to recover after the COVID-19 pandemic. Since COVID-19 has prompted substantial changes in health mobility, including the promotion of a healthy environment, a desire to learn more about health and well-being, and a reconsideration of the work-life balance with an emphasis on environmental sustainability, wellness tourism is expected to grow greatly after the outbreak, continuing the momentum that has been building up since the mid-2000s — when the Baby Boomers start to retire end masse. Specifically, the areas of notable potential highlighted in this review are those driven by health spa services, healthy food, and beverages, and sports activities.

Meanwhile, all stakeholders, including the public sector, private sector, civil society, entrepreneurs, and policymakers must be incentivized to stay up to date with current market conditions as they are continually changing in terms of behavior and demand. The stakeholders need to focus on the growth of wellness tourism, particularly the tourism behavior of older adults, to see their niches, opportunities, and roles in tapping into this emerging segment that is certain to stay for decades to come. Specific actionable items are suggested in the areas of demand-side analysis, non-traditional marketing and rebranding, and the paradigm shift in policymaking that investment in sustainability has a direct impact on the promotion of tourism.

This will bring about economic opportunities that reflect the needs of aging travelers locally and abroad.

Thailand had strong potential in wellness tourism even before the pandemic. On top of that, rebranding from low-cost tourism to high-value tourism is one of the keys to success. Thailand may enjoy tourists' spending and at the same time preserve its nature in more sustainable ways. Travel businesses should prepare themselves for welcoming travelers after the crisis by improving and tailoring their products and services to suit the needs of high-value customers, achieving national/global standards in safety and health through vaccination for service providers, and so on.

Lastly, the 25th Meeting of ASEAN Tourism Ministers in Cambodia showed that ASEAN — as a region — shares a common eagerness to welcome tourists and enhance cooperation and collaboration to achieve a cautious and steady reopening post-COVID. Perspectives gained from Thailand can serve to help them prepare themselves to welcome foreign wellness travelers again.

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