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Bathing in the healing waters. A case-study of the development of thermal spas in Greece

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Abstract

The purpose of this study was to explore the characteristics, the existing drawbacks and the future opportunities of thermal spas in Greece. Using a case study approach, 'Thermae' spa was chosen because of its long-standing establishment and current reputation. The sample included fifty spa visitors and two managers. One-to-one interviews and questionnaires were used to collect the data. Thermal spas in Greece attract mainly older adults who seek alleviation of their medical problems. The medical treatments are of high quality, however, thermal spas need to develop their leisure and recreational image and provide more opportunities for social interaction. Greece, offering an abundance of natural resources with significant healing properties, a great heritage, and a mild climate could be an attractive destination for people who want to take time off to relax and re-energise. The future development of thermal spas in Greece is a feasible option, however, there is need for diversification into different market segments, new state-of the-art infrastructure, and co-operation of the public and the private sector for planning a long-term and viable strategy.

Keywords: *Greece, health, older adults, thermal spa*

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Introduction

The belief that the natural environment affects human health can be traced back almost to the dawn of civilisation (Walton,1894; Casson,1974). Throughout history there has been documentation of people travelling long distances to seek alleviation of their health problems. The earliest archaeological evidence that indicates people travelled for the purpose of cure dates from the mid-third millennium BC (Gilbert, 1954; Krizek, 1964; Kevan, S.M., 1993).

Nowadays, experts are again "discovering" the importance of natural cures for improving

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and preserving health. Recent studies report the beneficial effect of spa treatments in low back pain and arthritis (Nguyen, Revel and Nougados, 1997; Constant et al., 1995), in knee and hip osteoarthritis (Forestier, 2000) and the contribution of aqua exercise to general mobility in older adults (Espanha et al., 2000). Spa therapies may play a complementary role in the treatment of several diseases as they alleviate suffering, they are almost totally devoid of serious adverse effects and they contribute to a better quality of life (Sukenik, Flusser & Abu-Shakra, 1999; Constant et al, 1998).

The awareness of the significance of healthy living and the general trends towards physical and mental development has made people more than ever eager to adopt a healthier lifestyle. Apart from medical care and rehabilitation purposes, fitness and wellness constitute important reasons for the increased selection of holiday destinations that offer a relaxed atmosphere and a healthy environment. In addition, the growing recognition of the benefits of preventive medicine and the need to take time off to relax and re-energise have resulted in an increasing trend towards leisure activities that provide plenty of opportunities for pampering and coddling (Cocherell, 1996).

Europe is world-widely known for its spa baths and the therapeutic power of thermal waters. Germany, Italy and France are the leading destinations in Europe for health-related tourism. Germany generates the biggest share of stays at health-related resorts in Europe and its spa towns attract 40-45% of the total tourists in Germany (Cocherell, 1996). Switzerland, Austria, Czech Republic, Hungary, Romania and Turkey attract also visitors for the same purposes.

Health tourism went through several changes and stages of growth and decline over the centuries. Until recently, citizens were supported by social security and insurance schemes that subsidised the expenses of treatments in spa resorts. Subsidisation has had a major impact in sustaining and expanding the spa industry, but the current reduction in subsidy levels throughout Europe is perceived as a significant threat for its survival. The decline over the last few years of the French spa business clearly demonstrates the impact of the introduction of more stringent rules on social security reimbursement (Cocherell, 1996). The ageing market has also given a tired image to thermal spas and as a result once-fashionable spas in the UK, Belgium and Luxembourg have experienced a decline.

However, as the interest in health-related tourism is increasing, a number of former popular spa resorts are currently being renovated and upgraded. Countries with appropriate natural resources and facilities develop and implement plans for improvement and growth. Thermalism as a specific product cannot generate mass interest, but it can be tailored to individual needs and tap higher income customers.

In economic terms, although investment and operational costs are high and returns appear in the long term, the multiplier effect is strength for the health related tourism industry. It is estimated that 1$ spent by a consumer in health-related services in Hawaii's resorts generates 2.15$. By comparison, 1$ spent by a typical vacationing tourist to Hawaii generates 1.76$ (University of Hawaii, 1994). The larger multipliers for health-related tourism, as compared to general tourism, are accounted for by lower leakage and higher value added due to the specialised skills and services required in the health-tourism segments.

The hot springs of Greece have been renowned for their remarkable healing properties since the earliest of times. Greeks visit the spas since 1500 BC. Herodotus (484-410 BC) and Hippocrates (460-375 BC) praised the healing properties of the hot springs. Until the 19th century, there were no rules and specific therapies for the different diseases. In 1918, the Department of Hot Springs in the Ministry of National Economy was established, and since 1950, it has been incorporated into the Greek National Tourism Organisation (GNTO, 1962).

Thermalism is the major form of health-related tourism in Greece. According to Konios

(1991), there are approximately 850 hot springs in Greece, but fewer than 100 have some infrastructure and operate regularly. Thermal spas are divided in two main categories according to the following criteria: a) tourist importance of the spa town, b) number of visitors per year, c) the chemical composition of the waters (ETBA, 1991).

Despite the long history and existence of spa baths in Greece, the contemporary thermalism presents several problems. The infrastructure of the most spa baths is inadequate, except for some spas of tourist importance which have adequate infrastructure and facilities (ETBA, 1991). The lack of modern buildings, the use of obsolete equipment, the dearth of recreational facilities and the low level of service have resulted in the creation of a 'tired' and gloomy image. Furthermore, the average age of the visitors is high because younger people do not find these destinations attractive (Karaiskaki, 1996). Finally, international travellers do not consider health-related services as a motive for choosing Greece as a holiday destination. According to a research at Aristotle University (Psoinos, 1994) among 3,412 tourists only 19 (0.6 %) considered the existence of spa baths as a motive to visit Greece.

It seems that for many years the GNTO did not perceive thermalism as a viable option and no strategic planning for the development and promotion of this form of tourism had been implemented. Furthermore, the lack of necessary facilities and services has resulted in the creation of resorts that have been developed supplementary to the major thermal spas without the initiative and the control of the GNTO.

The growth of health-related tourism in countries that can provide the necessary resources, its positive impact on their economies and its important role as a means of reducing the negative effects of mass tourism have currently turned the attention of the government planners to the potential of thermalism in Greece.

According to the most recent law for the thermal spas (1892/1990), one of the productive investments is:

> The building, extending and modernising profit-oriented thermal spas, sea bathing centres and health tourism centres as well as, buying equipment upon GNTO's agreement and on the basis of specifications stated by a joint ministerial decision of the Ministries of Environment/Urban Planning and Public Works and Development (Tourism). (GNTO, 1990)

After 1994, the subsidies for investment and development for building or extending profit-oriented health spas, sea-bathing spas and tourism health centres, range between 25 and 42% of the total investment (GNTO, 1994). Additionally, in the European Union programme "Tourism-Culture" (section 1.2) incentives for developing health-related tourism have been established.

Greece as a country with a great history in spa treatments, is nowadays re-evaluating the positive impact that health-related tourism could have in its economy. The number of changes demonstrate the increased importance that health-related tourism is gaining (Ktenas, 1997).

The implementation of plans for the development of health related tourism in Greece requires extensive research both in supply (infrastructure, personnel, costs, promotion) and demand (customers' profile). However, there is a lack of studies on the subject of health-related tourism in Greece (Tsartas, 1991).

The investigation of the current development and characteristics of thermalism, both in terms of supply and demand, could be an indicator for its potential for Greece and could generate some ideas for its further development and expansion in the domestic and international market.

The purpose of this study, with reference to the specific case of 'Thermae' spa, was to investigate the characteristics, both in terms of supply and of demand, of thermalism in Greece and to explore the existing drawbacks and future opportunities.

Method

The novelty of the concept of health-related tourism in Greece and the lack of up-to-

date information about the current situation necessitated the collection of primary data. Therefore, in an attempt to explore and describe the characteristics and trends of contemporary thermalism as these are presented in one of the most important thermal spa in Greece, case study was chosen as the most appropriate research strategy. Case studies can take place in settings where it is otherwise difficult to collect information (Donmoyer, 1990). Furthermore, due to the particular opportunities for involvement and personal observation that this strategy provides, an insightful perception of the setting was made feasible.

The choice of a thermal spa (the artificial name 'Thermae' will be used in this article), which constitutes one of the most important thermal spa resorts in Greece, was based on the degree that this spa represents thermalism in Greece.

Sample

The spa visitors and the managers were recruited for the collection of the appropriate data. An initial contact with the spa manager and the manager of the 'Municipal Corporation for Tourism Development' of the city that the thermal spa belongs to was made, information regarding the characteristics of the visitors using these facilities was taken and access to the spa was agreed.

The final sample comprised 50 middle-aged and older adults (Male = 20, Female = 30) who were asked to fill in a questionnaire and two managers who participated in one-to-one interviews.

Data Collection

The data were mainly collected in terms of two methods: a) in depth interviews and b) a questionnaire survey. The purpose of having these methods was the selection of both quantitative and qualitative data to provide a more comprehensive understanding of the characteristics of thermalism in 'Thermae' spa.

The Questionnaire

A combination of interviewer-completed and self-completed questionnaire forms was used. The participants who did not have problems in understanding the questions completed the questionnaire by themselves. An interviewer-completed form was used for visitors with various difficulties such as poor vision, and insufficient understanding of the questions. The novelty of the concept of health-related tourism in Greece and the lack of relevant research made the creation of an original questionnaire to obtain the essential information for the research purposes inevitable. The development of the questionnaire was based on questions created and information gathered from previous studies. The key objectives were to:

1. Present the demographic and lifestyle characteristics of the spa visitors.
2. Identify the factors that influence the choice of the 'Thermae' spa.
3. Record spa visitors' evaluations and recommendations for the specific spa resort.

The first six questions were used to obtain information on visitors' demographic characteristics. Two questions referred to the frequency of participation in physical activities and to the degree participants were diet conscious. Six questions were used to collect information on the reasons for going to a spa resort, and the importance of the various factors for visiting 'Thermae' spa. Finally, six questions were used to demonstrate the visitors' evaluation of 'Thermae' spa and their recommendations for its future development.

In order to confirm the appropriateness and applicability of the questionnaire, the following stages were applied:

1. The revision of the questionnaire by an English language teacher aiming to improve the accuracy and understanding of the questions' meanings.
2. The translation in Greek and the subsequent revision by a Greek language teacher.
3. The administration of a pilot study to 5 Greek older adults. Confusing items along with items that people found difficult to understand or inappropriate for the purpose of the instrument were excluded.

All descriptive analyses were performed using the SPSS for Windows statistical software.

The Interview Guide

The interview guide was based on finding out about: a) the development of the spa resort and changes through the years, b) The comparative advantages of the particular spa resort, c) The design and implementation of the marketing plan, d) The customers' needs and the diversification of the products, offered for the Greek and foreign visitors and e) The Greek health-related tourism market, its potential and future development.

The semi-structured interviews consisted of open-ended questions, which allowed the interviewers to probe and to divert in order to pursue an idea in great detail, as well as expand and paraphrase the interviewees' responses.

Procedure

Participants completed the questionnaires during their visit to the spa resort. After a brief presentation of the scope of the study, the two forms of the questionnaire were presented and the participants chose the appropriate form for them. Two interviewers helped participants to fill in the questionnaires. The data were collected during the summer when most of the people visit a thermal spa.

The interviews were conducted after the initial analysis of the questionnaires in order to compare the viewpoints of the customers with those of the managers and to gather information on topics that emerged from personal contact with the customers and from the observation of the thermal spa operation. Each interview lasted approximately 60 minutes. Having ensured informants' consent, the interviews were tape recorded and later transcribed verbatim.

Results

Management of 'Thermae'

'Thermae' is under the supervision of Greek National Tourism Organisation and especially the Department of Management and Development of Thermal Springs, which sets the prices and licenses the operation of a spa. Furthermore, it decides the specifications that thermal spas must have and checks if spas operate according to the standards. Still, this seems to be a typical procedure, since, to quote the General Manager of the Municipal Enterprise, 'the control is taking place once a year, and it is not a prescriptive procedure but a typical one'. Finally, G.N.T.O. has the authority to examine all the development plans.

'Thermae' has its own management for the day-to-day operation and this is in direct cooperation with the Municipal Enterprise for decision-making on development and marketing matters. The main index of measuring the performance of the spa is the number of baths, which is also the official index of G.N.T.O.

The marketing plan

The thermal and natural mineral water, the geographical location and the natural resources constitute the strong competitive advantages of 'Thermae' spa. However, marketing 'Thermae' is not an easy task, as the marketing plan must be adjusted to the needs of two different segments, the domestic and foreign visitors. According to the manager of the Municipal Corporation:

> The Greek customer acts as an individual and not as a part of a group therefore it is difficult for us to promote group holidays for the Greeks. On the other hand the European customers travel in groups. Tour operators demand a full package including treatments, food and accommodation. The cuts in funding for health cures from the Greek government make the diversification in foreign markets even more necessary, therefore we have to adjust to the norms and preferences of the European customer.

The promotion of special 'hydrotherapy packages' for 5, 7, 10 and 15 days aims at the foreign market. These packages include treatments for medical problems and programmes for relaxation, physical and mental revival, stress management and are tailored to attract a younger clientele.

> As health problems are related with older ages we try to offer also treatments for younger customers who do

> not have acute health problems but want to recover their strengths, to get pampered and to feel free from everyday obligations and stress. ('Thermae' manager)

Participation in exhibitions and co-operation with tour operators is an important activity for the promotion of 'Thermae'. The busy programme and the scheduled participation in several exhibitions all over Europe are indicative of the effort that the Municipal Enterprise makes to expand in the further European market. According to the manager of the Municipal Corporation:

> Although the promotion manifests encouraging results, we must continue this organised and intensive effort. Very often in the exhibitions people ask if our city is an island close to the famous islands of Mykonos, Rhodes, etc. and that shows that we have a lot of work to do.

The eastern market is very important, as countries like Russia show an increased interest in tourism, and more specifically in health-related tourism. The participation in exhibitions in Moscow and St Petersburg are part of the 'Thermae' plan to tap this market. According to the manager of the Municipal Corporation the "3-5% of people in Eastern European countries are very rich. Bearing in mind that the whole population is 150 million it is easy to understand how significant this market is for us".

However, the Greek market always constitutes the main target as it holds 95% of the whole market. Marketing by word of mouth has more influence (80%) than advertisement, as visitors get more easily persuaded by friends' or doctor's recommendations than by the media or travel agencies. The 'tired' image that thermal resorts have is a major constraint on expansion in different market segments other than the older adults. For that purpose, 'Thermae' has produced brochures and catalogues that promote the fitness and wellness facilities aiming at the attraction of a younger clientele. However, no positive results have been reached so far as all the visitors are more than 50 years of age.

Finally, the operation of the fitness and physiotherapy centre on a year round basis constitutes an important step towards the change of image that 'Thermae' tries to achieve. The diversification in several market segments is the overall aim and all the promotional efforts are designed to accomplish that target.

In summary, both managers agree that 'Thermae' has a strong position in the Greek market offering helpful services and an abundance of natural resources. Financial independence offers them the freedom to design the further expansion and development of 'Thermae' to foreign markets. However, attracting foreign customers and furthermore, promoting 'Thermae' to younger people needs a lot of effort, careful promotion techniques and new, state of the art, infrastructure.

The profile of 'Thermae' visitors

Athens is the main area of residence for the majority of the spa visitors as together with the municipality of Piraeus host 74% of the total number of visitors. Important is also the fact that only 4 % are foreigners.

Following international trends, women outnumber men, as they are more interested and motivated to visit a health and beauty resort. However, this difference is not so big as health problems do not discriminate between men and women and health improvement can equally motivate both sexes. The spa attracts older adults, offering therapies for ailments mostly appearing in elderly people (Table 1).

Table 1. The Demographic Characteristics of Participants

Variable	N=50	
Age (%)	66+	(72)
Gender (%)	Female	(60)
Family Status (%)	Married	(58)
Professional occupation (%)	Retired	(68)
Highest education attended (%)	Primary	(44)

The educational level appears rather low, as almost 45% of the visitors are primary school graduates. People aged over 66 were born in the 1930s and grew up in a very turbulent period for Greece (war, poverty, unstable government, lack of organisation). This situation made further education very difficult, as people had to work from a very young age to survive. In younger ages, a greater percentage of people have higher education and university degrees.

Table 2 presents the frequency of participation in physical activities. Equal number of visitors is never involved in any activity or participates regularly in physical activities. Visitors perceive as physical activity the 15 minutes programme that their doctor or physiotherapist has suggested them to do everyday as a part of the therapy for the relief of arthritis or other painful diseases. The perception of what constitutes physical activity to the participants came out during the administration of the questionnaire when respondents commented on the specific question.

Table 2. Lifestyle patterns

Physical activity		Diet Control	
Regularly	38%	Very much	58%
Occasionally	24%	A little	38%
Never	38%	Not at all	4%

Most of the visitors take care of their diet because of their health condition. Respondents stressed that the diet control is based on the doctors' advice rather than on their sound knowledge over nutritional matters.

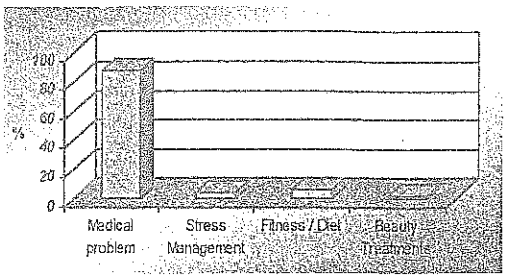
'Thermae' as a spa destination

The majority of visitors suffer from a health problem, which is the main reason of visiting the 'Thermae' spa (Figure 1).

'Thermae' does not attract people who want to improve their appearance or to recuperate from stress management and that implies the establishment of the 'tired' image of thermal spas.

Visiting a spa is more than a choice for variety and new experiences. Most of the customers perceive that staying in the spa is a

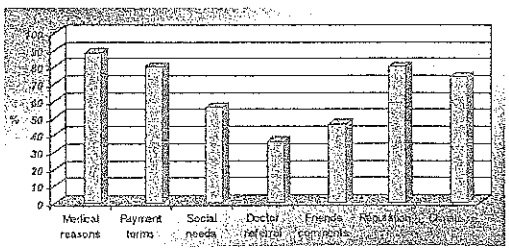
Figure 1. Reasons for visiting "Thermae"



yearly necessity, so 82% have been to a spa before. This continuity shows that visitors find visiting a spa very helpful for their health. As they mentioned, spa baths help them to suffer less during winter. Customer loyalty is also important as 52% of visitors keep going every year to 'Thermae' because they find the therapies offered there beneficial for their health.

Visitors stay at 'Thermae' spa for two or more weeks. This implies that for most of them going to 'Thermae' coincides also with their yearly holiday. Important is also the fact that for 80% of the interviewees costs are fully or partly subsidised showing clearly the dependence of thermalism on the government's health acts and decrees.

Figure 2. Motives for visiting "Thermae"



'Thermae' spa is a destination whose location, climate, medical treatments and overall reputation are its competitive advantages, as the 75-80 % of visitors find these factors very important on choosing this specific spa (Figure 2). The price also is very important, as most of the clients are subsidised and therefore they try to find an average price in both the membership of the spa and the accommodation in the city. Fitness and beauty facilities are not considered as factors for choosing 'Thermae' and that can be explained by the fact that visitors do not participate in exercise programmes

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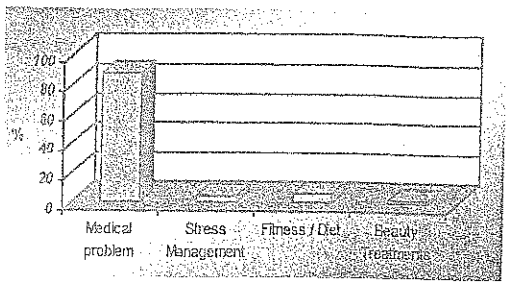

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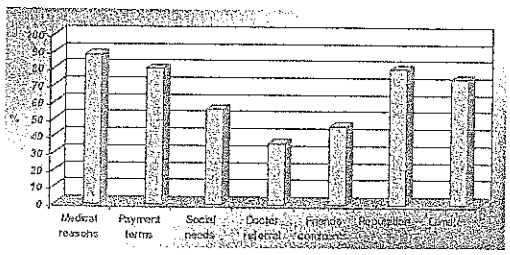

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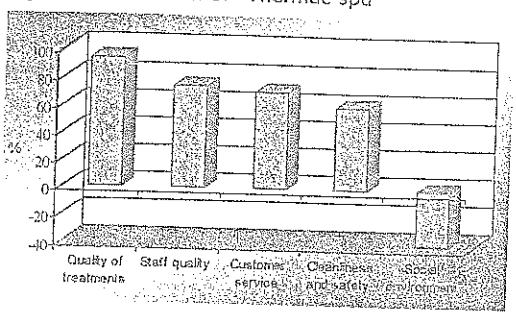
and therefore, they do not care about fitness facilities. However, they do care about social life which is an important factor as 56% of the visitors find it very significant when choosing 'Thermae'. The social environment seems to satisfy the visitors but they stressed the importance of the social life of the city and not the chances for socialising in the spa where most of them go just for the treatments.

Evaluation of 'Thermae' spa

Keeping its reputation of offering very good medical services, 'Thermae' was evaluated by 94% of the customers as good or very good for the medical treatments (Figure 3).

Figure 3. Evaluation of "Thermae spa"



The customer service was rated very high by the respondents. They were enthusiastic about the way the staff treated them and this is very important especially for older people who need more affection, love and care. Furthermore, sanitation and safety, necessary elements in an environment where there are people with health problems, have been rated highly. Many of the participants have some sorts of disability in walking or even standing and therefore safety in a well-designed indoor place is a necessity.

However, respondents stressed a number of problems such as the recreational services. Although social environment rates high, this is mostly because people perceive it as the environment outside and not inside the spa, with which many were not satisfied. As one of the things they want very much is to meet new people and build friendships especially at their age when loneliness is frequently a big problem, 'Thermae' does not offer them this potential.

Along with that, some participants stressed the need for psychological support and they suggested that a professional psychologist should offer advice to people during their stay to the spa. Furthermore, they mentioned the problems of insufficient infrastructure, expensive restaurants and noise, especially during the summer months.

Finally, despite the problems, 90% of the visitors answered that they would like to visit 'Thermae' again, and they would strongly recommend the spa to their friends, showing their satisfaction and positive attitude towards 'Thermae'.

Discussion

Purpose of this study was to investigate the characteristics, both in terms of supply and of demand, of thermalism in Greece and to explore the existing drawbacks and future opportunities through the case of 'Thermae' spa.

Travel for health and well-being is a growing sector in the world-wide tourism industry. The increasing importance of a healthy lifestyle, the use of body image as a sign of social status (Bourdieu, 1984), and the increased interest in alternative medical treatments have resulted in a rising demand for health-related tourism. Demonstrating a great history in thermalism, Greece is trying nowadays to promote health-related tourism through traditional and modern forms providing services for medical, fitness and wellness, recuperation and rehabilitation purposes.

Thermalism presents a 'tired' image as the majority of customers are older adults who depend on social insurance subsidies for their health-related holidays, which comprise also their yearly holidays. The fact that the medical association approves thermalism results in its dependence on public policies in terms of subsidies and insurance companies' policies. The internationally increased reluctance of many medical insurance companies to reimburse the cost of spa treatment is becoming the case also in Greece. The health reforms have put much pressure on the thermal spa industry as the number of people eligible for subsidies is decreasing.

The majority of people who visit the thermal spas find the treatments a yearly necessity and not a luxury good and they keep visiting them because they see improvements in their health. Therefore, it is important to establish the importance of spa treatment through evidence-based studies (Ernst & Pittler, 1998; Ballint & Szebenyi, 1997) in order to arrive at rationally based decisions relating to the efficacy of spa treatments. Following that, the Greek State, which is responsible for the provision of the standards and means for a quality life to all its citizens, must re-examine the health policies and reforms concerning thermalism. Furthermore, the economic impact of the development of health-related tourism both in revenue terms and in creation of new jobs for specialised personnel indicates the need for a long-term policy for development of health-related tourism in Greece.

Thermal spas attract mostly Greek customers, as they are not well known abroad. The 'tired' image they have and the recent health reforms, make diversification into other market segments their only way of survival. Specifically, 'Thermae' has adequate infrastructure for current needs but the plans for further development and expansion require modernisation of its facilities, new buildings, provision of new services and creation of a younger and vibrant look. Furthermore, thermal spas need intensive promotion in foreign markets so as to become known, and provision of attractive 'packages' of treatments in co-operation with tour-operators.

Having a great history and experience in thermalism, 'Thermae' is blessed with a number of competitive advantages such as its natural mineral water, geographical location, climate and natural environment. The positive evaluation of 'Thermae' spa draws an encouraging picture for its future development. The visitors acknowledge the medical treatments and the customer service as the best features and that implies the careful design and successful service provision of the 'Thermae' spa.

However, it seems that management has given all its attention to organising the medical side of the spa, underestimating the recreational and leisure side. That becomes evident in the evaluation of 'Thermae' regarding its social environment. Respondents stressed the lack of opportunities for interaction in the spa and the need for more social events. Considering that for most respondents visiting the thermal spa is also their annual holidays and also the fact that recreational activities can contribute to the well-being of older adults (Stathi & Fox, 2000a), there is a strong need for provision of recreational activities which can enable social interaction among participants.

The sedentary lifestyle of the participants and their lack of knowledge regarding fitness and nutrition present an important gap necessary to be addressed for improving their well-being. Considering the recognised benefits of physical activity to the physiological and biomedical aspects of older adults' health who comprise the majority of the spa visitors (ACSM, 1998; WHO 1997), it is important to establish ways of helping older participants experiencing several physical activities. In addition, the reported social and psychological benefits of physical activity in the well-being of older adults (Stathi & Fox, 2000b; Biddle & Faulkner, in press) stress the need for inclusion of physical activities in the activity program of the spa resort. These activities could contribute to the well-being of the participants through the increase of mental alertness, positive attitude, social interaction and the avoidance of stress, negative function and isolation. Furthermore, the fact that most of the visitors stay in the thermal spa for more that two weeks provides considerable opportunities for design and implementation of various fitness programs and healthy lifestyle seminars. If thermalism is about how to offer the maximum benefits for participants' physical and mental health, then a careful consideration on their characteristics and needs is required and a holistic approach should be adopted.

Conclusions

Greece, offering an abundance of natural resources, a great heritage, and a mild climate could be an attractive health-related

tourism destination. The competitive advantages of thermalism in Greece constitute significant factors for the attraction of visitors who seek to combine both holidays and physical and mental revival.

'Thermae' is one of the most important thermal spas in Greece, as it has long history in thermalism and an equally important contemporary development. However, there are at least three other important spas across the country and a lot of smaller underdeveloped spas, whose investigation would lead to a more complete and detailed presentation of health-related tourism in Greece. Therefore, the findings should be considered only as an indicator of the main characteristics of health-related tourism in Greece. Nevertheless, this research presented a number of primary data, which drew an initial picture of the health-related tourism in Greece, stressing the need for further future research.

Based on the study's findings, health-related tourism development in Greece appears to be feasible, as its competitive advantages in terms of natural resources and healing properties are strong. However a number of issues were raised and the need for several changes was stressed.

First, there is need for co-operation between the central and the local governments, the health industry and the hospitality industry to recommend policies and facilitate the development of strategies for health-related tourism. Furthermore, the private sector, the local authorities and G.N.T.O should establish ways in marketing Greece as a health-related destination combining the promotion of health-related products with the Greek tourism strengths such as favourable climate, natural beauty, rich culture and reputation for good hospitality.

Second, the state should provide incentives to the private sector for building new and high quality infrastructure in order to attract higher income visitors. Furthermore, health-related tourism providers in the private sector should identify appropriate international counterparts for the development of distribution channels for referred visitors.

In the individual level, spa managers should create recreational activity programmes in the specific health-resorts tailored to the visitors' characteristics and needs and provide more opportunities for social interaction. They should also provide more fitness and recuperation services to attract a younger and more affluent clientele.

Finally, there is need for more customer-surveys for the better understanding of the motivation, decision-making and satisfaction level of using health-related services in Greece in local and national level.

In a world that becomes more health-conscious and aware of the importance of a healthier way of living, the future of health-related tourism is fairly optimistic. However, its further expansion and success in Greece will be determined by the existence of a well conceived, long-term plan, involving the best ideas and the co-operation of all the interested parties, and aiming at providing high quality and competitive set of services to both the domestic and international market.

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