

**HORECA WELLBEING policies
for sustainable and inclusive growth
AND
NEW Competence for the Thermal *Thermal care* AGENT OPERATOR**

Introduction

The **HO.RE.CA.** sector consists of hotels, restaurants and café (or catering) companies and is one of the fastest growing sectors in the world, after tourism. As per the latest European Foundation for the Improvement of Living and Working Conditions (EUROFOUND) 2017 report, the Horeca sector is an integral part of the European Union economy, representing around 8% of EU's enterprise population and 7% of its workforce. Most importantly, this sector also features a burgeoning number of micro enterprises, comprising Small and Medium Sized Enterprises (SMEs), with over 90% of such companies staffing less than 10 employees.

Employment & Growth Trends in Horeca

Tourism is a major economic sector, directly contributing, on average, 4.2% of GDP, 6.9% of employment and 21.7% of services exports in the OECD area. Recent trends point to continued growth and outreach: globally, international tourist arrivals grew to over 1.2 billion in 2018, and OECD countries play a prominent role, with arrivals up 3.9%, representing 55% of the global total and accounting for 60.4% of global travel receipts (up 2.6% in real terms, reaching USD 1 226 billion in 2018). Despite widespread downward pressure on public finances, budgets for tourism have largely been maintained or increased, due to awareness of the important economic contribution of the sector.

Sustained development of the tourism sector will depend upon its ability to adapt to emerging economic, social, political, environmental and technological trends. Fulfilling tourism's potential as an engine for sustainable and inclusive growth will require the development of sound policies, integrated strategies, inter-ministerial structures, and mechanisms that involve the private sector and other stakeholders in tourism governance.

A large majority of countries have dedicated tourism policies, strategies and plans for the medium to long-term. There is much similarity between countries in their tourism policy priorities, which focus on improving competitiveness, sustainability and inclusiveness, addressing seasonality of demand, and enhancing the quality and appeal of the tourism offer. The last two years have seen a growing recognition of the importance of the development, management and promotion of local destinations, supported by regional or local structures and funding, and the preparation and execution of destination management plans.

A wide range of actions have been taken to develop and market distinctive products and destinations. Marketing activities have included various examples of successful regional and thematic branding. Many countries have established new offers and experiences based on their natural and cultural assets, and pursued opportunities for year-round growth through the promotion of health and wellness tourism, business tourism, events and various niche products.

Tourism policies continue to give a high priority to opportunities presented by digitalisation, both in creative and targeted communication and in the handling and analysis of data.

The growth of international travel, notably from the Chinese and other Asian markets, is providing opportunities in all continents. Further action has been taken to improve connectivity and reduce barriers

to travel, including visa requirements and entry procedures, while also addressing growing concerns about security. At the same time, various countries have strengthened promotion in the domestic market, including initiatives to extend holiday opportunities for all.

Supply-side policies to improve competitiveness include investment promotion and the simplification of business regulations, while recognising that there may be a need to extend and clarify regulations in emerging areas such as informal tourism services promoted through on-line platforms. The need to address labour and skills shortages in the sector is recognised as a key issue in many countries, requiring action to improve the awareness and attractiveness of careers in tourism and the availability of relevant training.

This is reflected in policy priorities in many countries, with actions taken to improve the monitoring of tourism impacts, extend certification schemes, encourage the use of new technologies and green finance instruments, and generally promote environmentally sustainable and socially inclusive tourism growth.

Key policy messages

Fostering an integrated policy approach:

- Develop long-term strategies that consider the trade-offs and complementarities with related policy areas, and clearly identify the roles, functions, and interactions of key stakeholders.
- Recognise the value of strong dialogue between government, industry, and civil society in the development, implementation and monitoring phases.

Preparing for megatrends:

- Build systemic and strategic approaches to adapt in an increasingly fast-moving, interconnected and dynamic environment.
- Modernise regulatory and legislative frameworks, broadly engaging with key stakeholders in their development, and supporting predictive mechanisms in the policy and regulatory process.
- Cultivate partnerships with industry, other governments, and civil society to address the cross-cutting impacts of megatrends, and developing responses that account for new and innovative business approaches to service delivery.
- Take steps to future-proof tourism policy and promote a culture of innovation and change management within government to ensure that long-term megatrends are given due consideration, notably through robust data analysis and scenario planning.

Occupational Competence Profile for Thermal Care Agents through ECVET in Best by Doing project.

The aim of the report is to review the status of 'thermal care agent' as an occupation and to investigate the required knowledge, skills and competencies for 'thermal care agents' as well as the methods of acquiring them in project partner countries, namely Hungary, Italy, Spain, Slovenia.

It starts with the role and developmental problems of tourism in European Countries and draws attention to the growth of medical and wellness tourism which calls for the extension and development of new occupational profiles in this area. After that, the report reviews the occupations and competency profiles of vocations that are closely related to thermal and spa therapy occupations in the countries involved in the project. Then, some examples of vocational qualifications relating to thermal and spa therapy are offered from the literature. Later on, methodology and results of an empirical research in project partner countries investigating the required areas of competence for 'thermal care agent', which was renamed as ***thermal spa therapist*** after the review of thermal spa therapy related occupations in partner countries and the literature, are presented. Finally, based on the literature review and empirical research a competence profile alongside with learning units for the education and training of thermal spa therapists are suggested.

Introduction

Despite occasional fluctuations, international tourism has experienced continued growth and diversification to become one of the largest and fastest-growing economic sectors in the world since 1950's (United Nations World Tourism Organization, 2018). International tourist arrivals have increased from 25 million globally in 1950 to 1186 million in 2018 and international tourist receipts have grown from US\$ 2 billion in 1950 to US\$ 1260 billion in 2018 (United Nations World Tourism Organization, 2018). It is estimated that tourism is the third export sector in the world after fuels and chemicals (United Nations World Tourism Organization, 2018). Europe ranks first as an international destination as well as tourist generating region. Europe has the biggest market share of international tourism receipts and tourist arrivals. In 2018, Europe accounted for 36% of worldwide international tourism receipts, and 51% of international tourist arrivals (United Nations World Tourism Organization, 2018). More specifically, tourism also plays an important role in the European Union (EU) due to its contribution to economic growth and employment, as well as its social, cultural, and environmental positive impacts. According to the European Commission, tourism is the third largest socio-economic activity within the European Union (EU) after the trade and distribution, and construction sectors (European Parliament, 2017). Tourism accounts for over 10% of GDP and 5.2% of the total workforce in EU (European Parliament, 2017). The EU is a major tourist destination, with five of its Member States (France, Spain, Italy, Germany and United Kingdom) among the world's top 10 destinations in 2015 (United Nations World Tourism Organization, 2018). Majority of international arrivals to EU originates from EU inbound visitor flows. Residents of the EU made 223 million tourism trips of at least one overnight stay to destinations in another EU Member State in 2018 (Eurostat, 2018). However, because of the slow growth rate of tourism compared to other regions of the world, Europe's market share in terms of international tourist arrivals and receipts is decreasing (European Parliament, 2018). For this reason, one of the main objectives of EU tourism policy is to maintain the leading position of Europe as an international tourist destination (European Parliament, 2018).

In order to improve competitiveness of European tourism sector and increase demand, reinforcing quality of tourism services, improving professional skills in the tourism sector, overcoming the seasonal nature of demand and diversifying the supply of tourist services, among others, are proposed (European Commission, 2018). To diversify the supply of tourist services in EU, the development of thematic tourism products such as cultural heritage, contemporary culture, protected natural sites, health and wellbeing (including spa tourism), educational, wine and food, historical, sport or religious tourism, agri-tourism, rural tourism, tourism capitalizing on the maritime and sub-aquatic cultural heritage, industrial heritage, or the economic fabric of a region are suggested (European Commission, 2018). Indeed, development of health and wellness tourism is one of the ways to help diversify tourism offer, reduce seasonality problem and increase demand and tourism revenues, all of which may contribute to the overall competitiveness of Europe as a destination.

Health Tourism and the Need for New Occupational Profiles in Europe

Health is defined very broadly as a 'state of complete physical, mental, and social well-being, and not merely the absence of disease and infirmity' (World Health Organization, 2017). Health tourism is often used as an umbrella term covering travel for medical treatments and wellness including spa and thermalism treatments and services (Smith and Puczko, 2015). Mueller and Kaufman (2016) defined health tourism as a tourism activity of 'people in order to promote, stabilize, and, as appropriate, restore physical, mental and social well-being while using health services'. Recently, Smith and Puczko (2015, p.206) proposed that health tourism are 5 'those forms of tourism which are centrally focused on physical health, but which also improve mental and spiritual well-being and increase the capacity of individuals to satisfy their own needs and function better in their environment and society'. Put shortly, health tourism is 'travelling for the maintenance, enhancement and restoration of wellbeing in mind and body' (Costa, Quintela and Mendes, 2018, p.6). A distinction has often been made between medical tourism (healthcare tourism) and wellness tourism categories of health tourism. Medical tourism is the travel activity of people to 'a different place to receive treatment for a disease, an ailment, or a condition, or to undergo a cosmetic surgery' (Global Spa Summit, 2018). In their definition of medical tourism, Medical Tourism Association stresses the travel activity to a different location to 'receive medical, dental, and surgical care'

with equal or greater healthcare value. On the other hand, wellness tourism is defined as 'travel associated with the pursuit of maintaining or enhancing one's personal wellbeing' (Global Wellness Institute, 2018). Treatments, activities and therapies for the renewal and balance of physical, mental, psychological and social wellness (mind, body, spirit) are emphasised in wellness tourism. Wellness tourism is thought to be a proactive approach and preventive while medical tourism is reactive and curative (Smith and Puczko, 2017). In other words, medical tourism is the travel activity of people who are ill and that is called 'therapeutic point of view' and wellness tourism is the travel activity of people who are healthy and who want to maintain or improve their health, and that is recreational point of view. According to Global Wellness Institute international and national wellness tourists made 691.0 million wellness trips and spent \$563.2 billion in 2018 and that is 6.5% of all tourism trips and 15.6% of total tourism expenditures (Global Wellness Institute, 2018). Europe is the destination for the largest number of wellness trips. A number of trends and lifestyle changes are driving the growth of health and wellness tourism sector both in the world and in Europe. In the case of medical tourism, long waiting lists, the high cost of medical treatments in the origin country, better medical treatment elsewhere, restriction or regulation on the use of some medical technologies and treatments in the generating country, development of communication and information technology and fewer barriers to travel are making healthcare services in another country attractive to many. Besides, increasing proportion of retired and elderly population who are concerned with chronic health problems; a renewed interest in healthy, long and better quality of life; a growing market for complementary and alternative medical treatments, an obsession with bodily appearance, the need to get away from technology dependence (digital detox retreats), stressful work and city environment, a search for traditional and authentic experience and new nature movement to overcome 'nature deficit disorder' are driving the demand for medical and wellness tourism as well. Health and wellness is one of the most ancient forms of tourism dating back to 5000 BC and nowadays it is a rapidly growing sector in both domestic and international tourism.

Thermal (mineral springs) and spa facilities are in a perfect position to offer treatments and services for both medical and wellness tourism in EU countries (Figure 1) and improve the quality of life and wellness of people. Within Europe, there is a renewed interest in thermalism and traditional health spas, based on natural mineral springs (Rivero, Rangel and Caldito, 2018). Elderly people are the largest group of thermal and spa tourists and currently, more than

Thermal/mineral springs facilities are defined as 'establishments associated with the wellness, recreational, and therapeutic uses of waters with special properties' (Global Wellness Institute, 2018),