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WELLNESS TOURISM: A HIGH PROSPECTIVE NICHE MARKET AFTER COVID-19 IN SRI LANKA

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ABSTRACT

The COVID-19 pandemic has created a consciousness towards wellness tourism. From the idea of several definitions, it can be stated that wellness is a state of mental, physical, and social wellbeing. COVID-19 situation has caused severe damage to the economy, people's lives and created a new normal situation. This has instigated a stressful situation globally and the post-COVID-19 period can be a time that redirects the system of tourism and the opportunities for clear and responsible development. Even though there are no proper directions, policies, statistics in Sri Lanka, the awareness about the industry is considered to be very low. On the other hand, Sri Lanka's traditions, Ayurveda and Hela Wedakama practice along with the food and nature of the people of Sri Lanka, giving a promising opportunity to develop the sector as a niche. To understand that potential, this study aimed to understand the wellness tourism markets, setbacks of the current industry, and the positioning strategies of the industry using thematic content analysis. Semi-structured interviews were used to understand the experience and perception of tourists and to identify the present situation of the wellness industry in Sri Lanka. This study reveals that Sri Lanka has an untouched, trustworthy competitive edge in wellness tourism even though the promotional activities are considered to be low when compared to other competitive countries. Not many travellers are aware of the wellness experience of Sri Lanka. Nevertheless, at this moment, this can be considered as the best option to travel after

COVID-19. At present, many setbacks can be observed in the industry and there should be proper direction and roadmaps need to be developed to progress wellness niche by grabbing the opportunity.

Keywords: Wellness Tourism, Positioning, Setbacks

INTRODUCTION

The tourism industry is considered to be one of the fastest-growing economic sources globally. Within the large market of tourism, niche sector like wellness tourism aims to generate a healthier population, where the healthier population could be turned into a productive source of economic development. Wellness is identified as a concept of balancing and spirituality associates mental and physical health with environmental and social fundamentals (Steiner & Reisinger, 2006).

The demand for wellness tourism rapidly increases along with the changes in the lifestyle of the people as it is highly focused on firming the ability to survive with the routine demand of lives and to stay healthy against any kind of illness. The major reason behind the demand for wellness tourism is to cope with the stress caused by work or environmental conditions. United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP, 2008) stated that people tend to travel to long-distance destinations to maintain their health and relaxation.

When considering the context of the Asian region there are several countries like India, Thailand, Malaysia and Singapore which were truly the competitors who were attracted more than 2.5 million medical tourists toward their country (UNESCAP, 2008). Compared to this fact Sri Lanka is also known for its Ayurveda practices and the medicines as well as the natural herbs available in the country (Indika, 2020). Wellness tourism has invented and started to grow as a niche market sector in Sri Lanka. The global trend of wellness tourism has created a place in the market of Sri Lankan wellness tourism also.

However, in the year 2020, the outbreak of COVID-19 has affected almost all the countries and it is also anticipating prolongation for a specific period. This pandemic had caused fear, anxiety, and stress due to social distancing, travel restrictions, and isolation. Once the global pandemic is over, then the demand for tourism will be stimulated and using that opportunity, the proper implication of wellness tourism to de-stress, detox and reinforce peoples' well-being could be a long-standing solution for recurring to healthier and sustainable tourism development (Scott & Emma, n.d.). The hasty growth of wellness tourism started to focus on firming resources and maintaining and protect the people of all types of age groups against illness.

Therefore, this study focuses on developing wellness tourism as a high prospective niche market with all the potentials in Sri Lankan wellness tourism. To standardize the study, this has focused on the objectives such as understanding the competitive advantage and wellness tourism market of Sri Lanka, evaluating the present setbacks of the wellness tourism sector in Sri Lanka and identifying positioning strategies of the wellness sector as a niche market after COVID-19.

Problem Statement

With all potentials available as resources, nature, habits, and traditions, the wellness tourism industry can be promoted as a well-directed niche market in Sri Lanka especially after COVID-19. When sector growth is considered, service providers are already aware of the demand for wellness offerings (Sri Lanka Export Development Board, n.d.). As per the report of the Government of Sri Lanka, the Wellness tourism sector receives only limited support as well as it is also reported with a shortage of information for further development. And it does not presently have committed policies, institutions, regulations, statistics, or specific support programmes (Government of Sri Lanka, n.d.). With the observation of the current situation, there are reports regarding the contrary impacts due to COVID-19 on people's lives with greater stress and frustration because of the situation and losses of human lives. Therefore, the proper implementation of the wellness tourism sector could be a great potential to maintain a healthy human being. Intending to fulfil the gaps in the Sri Lankan wellness tourism industry, this study focuses on creating a clear understanding and direction towards wellness tourism where the current pandemic situation can be a root cause of a new paradigm of wellness tourism.

LITERATURE REVIEW

Wellness Tourism

The key concept of wellness was originally introduced by American doctor Halbert Dunn in 1959 (Dunn, 1959) and he has written that wellness could be stated as a special condition of well-being which a person can entail body, spirit and mind. Wellness tourism has become a travel trend as a reason of more health mindfulness of middle and upper class and the essential in coping with stress (

UNESCAP, 2008). Also, it has become very popular as a reason for increased demands in specific needs of people. Numerous definitions could be observed in the previous studies and among that GWI defines wellness tourism as the travel associated to improve and maintain one's well-being and detect mental, spiritual, and physical or environmental wellness while travelling for leisure or business (GWI, 2014). Also, another definition stated by Sri Lanka Export Development Board was taken as the appropriate definition for wellness tourism describing that wellness tourism intends to control and develop the fields of human life such as emotional, mental, physical, spiritual or

intellectual and it aims to balance these domains.

Considering the global situation of wellness, it can be stated under different forms and in general it can be defined that domestic or international travellers who travel with the purpose of wellness in their mind and they look for specialized local and natural traditions as well as different kind of facilities and support services (Sri Lanka Export Development Board, n.d.). Further, they stated that the trend of wellness tourism shows that there is a huge demand for hotels associated with health as well as they look for a defined concept of wellness from the destination they have visited.



Figure 1: Diversity of wellness tourism products (Source: GWI, 2018)

As shown in the picture, wellness tourism consists of a variety of products and multi-dimensions. With a deep understanding of the wellness tourism industry of Sri Lanka, the scope of the wellness industry can be taken as western medicine, traditional medicine and wellness where western medicine includes hospitals and clinics, traditional medicine includes Ayurveda clinics, resorts and

spas and finally, the wellness includes a spa, nutrition, yoga and spiritual retreats (Sri Lanka Export Development Board, n.d.). Though it is important to identify the factor that medical tourism and wellness tourism have significant differentiation but the wellness tourism can be established with the support of medical tourism and other facilities.

Wellness tourism provides people of all age groups with high health concerns and as a well-known fact, the tourism-related part of wellness is identified as wellness tourism. People travel to reduce stress, sustain a healthy routine, prevent disease, and boost their wellbeing (Scott & Emma, n.d.). Wellness tourism is considered as a sub-sector/category of health tourism (Mueller & Kaufmann, 2001). A well-conserved and natural environment are considered to be part of wellness tourism appeal and a country like Sri Lanka is often considered as a destination with cultural and nature-based sustainability which can contribute to the allure of wellness tourism after the pandemic situation.

International state of wellness tourism before COVID-19

According to UNWTO (2018), it has been reported that 56% of travellers have travelled for leisure, recreation, and holiday purposes where as VFR, health, and religious purposes followed by 27%. Further, it has been stated in the international megatrend report (2019) regarding the trends influencing the travel and tourism industry and the major impacts of the tourism industry are identified as healthy living, which contains an enlarged focus on wellness and the sharing economy, ethical living, integrated consumers and shopping online.

It is also significant that the wellness tourism market is a conspicuous driver and as reported in Global Wellness Institute (GWI) (2018), an estimated total of direct, indirect spending of \$683 billion is accounted for. Further, according to the GWI report, the wellness tourism sector is projected to have produced \$639.4 billion in GDP and 17.9million jobs worldwide in 2017.

Wellness tourism in Sri Lanka

The term “wellness” may seem to be a discovery in this period but in Sri Lanka, the identified heritage of culture and

spirituality, availability of the resources which were used for the well-being of the population in Sri Lanka have been known for thousands of years (Government of Sri Lanka, n.d.). Further, they have stated that Sri Lanka has a competitive edge and benefits till the natural power has been utilized for a very long time in the country and holistic tourism and spiritual tourism can be considered as the major sub-sectors of the wellness tourism industry of Sri Lanka. These kinds of preventive health activities can be involved in lifestyle changes.

According to Smith & Puczko (2009), the success factors of wellness tourism it can be acknowledged as wellness is more than just spas. Ecological and green products are part of wellness. Local resources, lifestyles of the population, new or cross over products or facilities, evidence-based services and treatments, spirituality and finally the segmentation and all these factors could be directly applied in the success of wellness tourism of Sri Lanka. The wellness tourism in Sri Lanka is considered as one of the evolving sectors in the export and the precise characters of the country’s wellness sector, with the appropriate support and cherish, could contribute to the brand image development of a nation as well as to the employment generation (Government of Sri Lanka, n.d.). Conferring to the National Export Strategy, Sri Lanka has divergent deliberate advantages for the development of the wellness tourism sector (Sri Lanka Export Development Board, n.d.). Further, they have stated that at present, wellness tourism is a promising industry concentrated on traditional medicine, and also it is supplemented by a related but separate segment focused on western medicine. Also, the Sri Lankan culture, the traditional medicine of Sri Lanka, signature healing methods and health system of Sri Lanka and the association of wellness with the Buddhist culture are the

major focus points which can be further expanded to create a specified niche.

METHODOLOGY

Considering the complexity and multidisciplinary nature of wellness tourism, this study focused on the qualitative approach and an exploratory study as there are not many studies done in Sri Lanka in the relevant context. The first objective of this study is to understand the wellness tourism market and its competitiveness and it has been done through a thorough analysis of existing studies and the research findings of the Sri Lanka Export Development Board. To find out the setbacks and the potentials of the wellness tourism industry, a semi-structured interview method was used as it is majorly focused on exploratory nature.

To collect the primary data, semi-structured interviews were conducted over the telephone and skype considering the pandemic situation with representatives from government bodies related to the wellness tourism sector, service providers of wellness tourism, and the tourists who have travelled for health and wellness before COVID-19. The sample consisted of 20 participants including 10 international tourists (snowball sampling technique), 05 members of government bodies in the wellness tourism sector (convenient sampling technique), and 05 members of wellness product service providers (convenient sampling technique). The secondary data was collected from the existing literature, journal articles, newspapers, reliable web sources, and books on the wellness tourism sector. Collected data were analysed through a thematic content analysis, the text of social investigation among the set of a pragmatic method (Kumar et al., 2018).

RESULT & DISCUSSION

Understanding the competitive advantage and wellness tourism market of Sri Lanka

The current pandemic situation caused a new trend on continuous personal health evaluation, lifestyle changes and new habits. Therefore, nowadays the people looking at wellbeing and personal safety through any means and it can be a root cause to develop wellness tourism as a niche market in post COVID. With this emerging trend, it is necessary to participate in strategic decision making about the wellness tourism industry also it is considered that the participation of relevant tourism authorities is very much crucial to clearly understand the wellness tourism market of Sri Lanka.

Sri Lanka has an untouched, trustworthy competitive edge in ancient traditions, Ayurveda, and local Hela Wedakama ("Wellness Tourism – What do we need to know," 2020). The offerings of wellness tourism are mostly associated with incredible nature, people, and food. Wellness tourism in Sri Lanka is considered to have a link with medical services in Sri Lanka. With all practices of Ayurveda and other preventive practices, several key competitors can be identified such as Thailand, India, Malaysia, Republic of Korea, and Dubai (Government of Sri Lanka, n.d.). As per the statement of the service providers, Sri Lanka has been majorly considering the key competitive factors like reputation, image, the advantage of the places and the specialists, prices, facilities, and accessibilities. Even though there are no specific statistics related to wellness tourism in Sri Lanka, we can observe some sort of clarification regarding the offerings and the wellness tourism products of Sri Lanka. Ayurveda doctors have categorized wellness tourism into two types as preventive and curative activities.

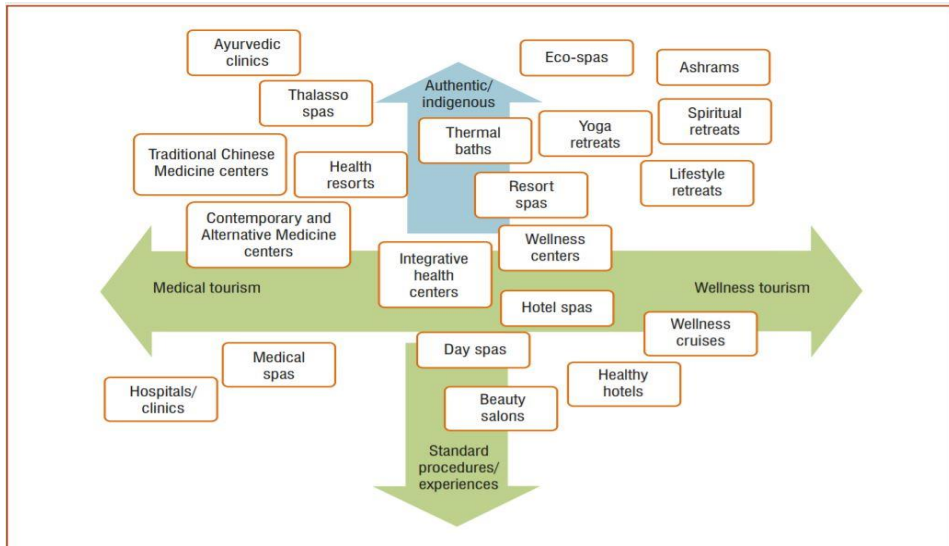


Figure 2: Existing wellness tourism products in Sri Lanka (Source: NATIONAL EXPORT STRATEGY of Sri Lanka-Wellness tourism strategy 2018-2022)

While discussing the wellness tourism products, it can be stated that from both tourists' and service providers' perspectives, there is a huge demand for wellness tourism products, especially Sri Lanka currently offering a variety of wellness tourism products and those products are diversified and blooming based on tourists' demand.

- Ayurvedic and Spa resorts: The most popular and well-established offering of Sri Lanka and it offers the services of relaxation, Ayurveda treatment, natural therapies and nutrition. This sector involves the hotel spas as well.
- Yoga retreats: Most popular among domestic and international travellers and the demand has been increased.
- Hindu Ashrams and Beauty salons for prevention
- Ayurvedic clinics as disease treatment outputs.

Currently, the wellness industry of Sri Lanka contains two bases for wellness offerings such as holistic tourism which involves healing treatments, therapies, and

health treatments pointing to balance the mind, body and spirit and the other is a spiritual base that involves the search for meaning and divine existence majorly focuses on visits to spiritual destinations, yoga, meditation etc... Based on the available resources and the sub-sectors of the wellness industry of Sri Lanka, wellness travellers can be categorized into two types,

- Primary wellness travellers: As per the study there was no evidence found that the tourists are travelling to Sri Lanka with the major purpose of wellbeing and their destination choice was not with the primary purpose of wellness offering destination.
- Secondary wellness travellers: This was the major group of travellers evidenced through the studies who have visited Sri Lanka mainly for leisure, business and other purposes though they tended to experience the wellness offerings of Sri Lanka especially, spa, yoga or meditation and any kind of natural-based wellness experience.

Through the analysis of all relevant sources and the conversations with the relevant authorized people and the stakeholders, this study had identified major competitive advantage of wellness tourism of Sri Lanka as, high demand for the supportive cultural heritage of Sri Lanka, merged traditional knowledge of Ayurveda which created a unique health system, meeting the clients' demand by reinforcing the alternative medicine through long traditional treatments and the mix of culture and food traditions along with the benefits from its location. As per the statement of one of the major stakeholders of Yoga and Wellness founder, it has been identified that Sri Lanka can find a major niche market of wellness tourism in the post- Covid era. Further, she added that Sri Lanka includes all the key elements that can make an ideal wellness destination along with traditional Ayurvedic sciences and wellness retreat spots. Even though the wellness industry of Sri Lanka consists of major strengths as well as weaknesses.

Strengths of wellness industry of Sri Lanka

- Location of Sri Lanka with long historical and strong cultural background.
- Easy accessibility to its major tourism generating destinations and direct airlines services for most of the destinations.
- Popular country for its western medical offerings and long history of Ayurvedic and traditional healing approaches.
- Involves several stakeholders who work hard to develop the sector and finding different ways to diversify and making the industry a niche market.

Weaknesses of wellness industry of Sri Lanka

- Lessor not focused on the domestic market towards the promotion of

wellness and therefore the reputation is very low among the domestic people.

- A limited number of certified Ayurveda resorts and limited regulations to the organizations that are operating in the field of wellness.
- Lack of statistical database related to the wellness tourism sector as well as less detail about the overall sector of health and wellness.

Present setbacks of the wellness tourism sector

The existing situation of the wellness tourism sector has been identified with limited support and no proper directions, as well as there are no designated regulations, policies, organizational implications, and statistics. Currently, the Ministry of Tourism Development and Christian Religious Affairs and the Ministry of Health, Nutrition, and Indigenous Medicine are the major organizations involved in the matters of wellness. No specific private associations were found related particularly related to the wellness tourism sector. Through the thorough analysis of the contents, certain setbacks were identified in the sector such as there are not many value-added activities observed in the field and the growth of wellness tourism industry is not considered as a major sub-sector. No proper policies and directions were identified and the strategic guidance has not been constantly implemented (Government of Sri Lanka, n.d.) and no proper monitoring strategies and information statistics were identified to cope up with the growth of wellness tourism as a niche market.

Also, the attitude towards wellness tourism is considered to be low and because of that there are some limitations in finding the quality workforce and professionals such as spa doctors, Ayurvedic practitioners and as per the statement of current service providers, the

career in wellness tourism industry holds a bad image among students and the public. Further, in the absence of proper regulations and statistics, it could be observed that some of the tourists are reluctant to experience wellness tourism in the future. Moreover, due to the less recognition of traditional medicines, there were some barriers to the service providers to enter into the career in the wellness tourism industry.

Moreover, while considering the perspective of few tourists both from domestic and international, some of the domestic travellers said that most of the hotels were not been advised or promoted to get any kind of experiences related to spa, yoga and any other wellness activities. "As the registered spa hotels, resorts are considered to be one of the key players of the wellness tourism industry, hotel yoga and spa retreats can be a major attraction to attract more tourists to the country as well as to earn income," said yoga instructor cum personal trainer. Further he added that "one of the major drawbacks we could sadly say that, Sri Lanka is not concerned about promoting wellness to the domestic travellers and no one even tried to get the local market". One of the founders of yoga and wellness in Sri Lanka further identified that the demand of the wellness tourists is still at the highest level compared to the normal travellers. Nevertheless, Sri Lanka is not being able to cope up with the demands and still is considered to be an upcoming industry with loads of setbacks. As per the concerns of the relevant stakeholders who participated in this study, it could be stated that wellness tourism is currently not given more attention by relevant stakeholders and the authorities.

Positioning strategies of the wellness sector as a niche market after COVID-19

As a country, Sri Lanka has managed the pandemic better with low death rates and a low number of identified cases. Tourism experts and professionals have

been projecting that there will be an enormous increase in demand for visiting wellness destinations as travel restrictions ease. With COVID-19 impacts, there is much concentration on immunity-boosting, healing therapies, and spiritual retreats which can discharge depression, anxiety, and fear. To use this opportunity and to develop wellness tourism as a potential niche market, positioning strategies need to be considered.

- Positioning to the new markets: Sri Lankan concepts of wellness practices need to further focus on capturing new markets. The scope of wellness tourism can be tapped into GCC countries, Australia, and European markets (Government of Sri Lanka, n.d.). Branding Sri Lanka as a well-known wellness tourist destination is a crucial part of positioning to new markets. Combining the wellness services along with entertainment will be highly effective in marketing for countries like the United Kingdom and European countries. One of the tourists from Russia who experienced wellness in Sri Lanka stated that "we haven't experienced many diversified products which are evidenced by the culture of Sri Lanka and it would be better if there is a separate segment for yoga and related retreats". Therefore, focusing on alternative ways of retreats and combining the services can be beneficial in positioning to new markets.

- Positioning based on Age groups: As today travellers look for meaningful travelling in the existing trends, the participants of this study from the young age group also expected spa, relaxation, and meditation treats as same as little older age group people expected yoga and meditation.

- Positioning based on quality & luxury: As per the statement of government officials who participated in this study, at present Sri Lanka is not catering to the high-end market. With resource availability, professional instructors, traditional practices, and

specialists, Sri Lanka has a higher potential to focus on the high-end luxurious market. And a segment of tourists is also willing to experience the luxury wellness treatments further some of the Ayurvedic resorts like Siddalepa, Jetwing, Santani, etc...already offers high-end products.

- Positioning current products to current markets: In the current situation, the wellness tourism products were not identified as a separate market and there is no proper certification system has been implemented. Therefore, the strength of branding for an existing product is compulsory to develop the wellness industry as a niche market. Through using trademarks, identification and certification the wellness industry can be positioned in the local tourism market.

- Combining the segments of western medicine and traditional wellness tourism: As the western medicine and the traditional health tourism segments are perceived as two different components by most of the tourists as well as the authorities, there is a need to coordinate these two segments to strengthen the knowledge. Also, both services can be offered under one concept under the supervision of relevant authorities.

Limitations of the study

The wellness industry in Sri Lanka is still considered to be an industry that misses the support from several other sources, and with those factors, the researcher finds the limitations in the data collection and structuring the discussion. Since there were no subsectors involved in wellness tourism, the researchers also faced a lack of coordination and there was no specification given to monitor the data related to the wellness industry of Sri Lanka.

CONCLUSION

The wellness tourism industry is still emerging in Sri Lanka. The promotional activities are considered to be low when compared to other competitive countries like India, Malaysia, and Thailand. Availability of resources, funds received to recover from crisis, the practices of Ayurveda & Hela Wedakama as Sri Lanka's indigenous medicine, are the critical factors to develop wellness tourism as a niche market. During the crisis of COVID-19, the lockdowns made individuals cope up with home-based wellness practices such as gardening, Yoga, cooking, mindfulness activities, etc... ("Wellness and spiritual tourism after COVID-19," 2020). Also, almost all the tourists who participated in this study wanted to escape from their situation for immunity enhancement and preventive treats after this stressful situation. As per the study, not many travellers are aware of the wellness experience of Sri Lanka. Nevertheless, at this moment, this can be considered as the best option to travel after COVID-19. The general statements of the tourists who participated in this study indicated that over the last year many members from their friends and relative circle become more health-conscious and further they were looking for better options to travel after COVID-19 to take care of their bodies and mind in a better way.

At present, their many setbacks can be observed in the industry and there should be proper direction and roadmaps need to be developed to progress wellness niche by grabbing the opportunity. Many practitioners and yoga teachers who participated in this study concluded that even though more practitioners have succeeded in the industry they did not get a chance to contribute to thoughtful Covid management. Further, they added that even though Sri Lanka has more relevant stakeholders in the wellness sector like

Indigenous medicine ministry as well as several alternative treatment methods like homoeopathy, Siddha medicine and Ayurveda still the policies needed to be implemented to regulate the industry.

Considering all these factors it can be stated that with high potentials, Sri Lanka needs to consider developing the career path, professionalism, and brand image of the wellness tourism industry. Along with the rapidly increasing demand for wellness tourism, Sri Lanka has a huge opportunity to become an authentic wellness tourism destination all over the world. Further, the wellness tourism product can be diversified with major demand from the tourists like weight loss treatments, relaxation of body and mind, escaping from daily stress etc

RECOMMENDATIONS

According to the findings of this study, the following recommendations can be given to develop the wellness industry as a niche in Sri Lanka.

- Building an information platform regarding the wellness tourism market, target market, and visitor details to overcome the shortcoming of lack of statistics and data about the industry.

- Structuring a proper quality measure system for traditional wellness methods to market a quality wellness tourism output to the tourists and to create a brand image.

- Expanding and differentiating the wellness tourism industry and value-adding by focusing on new products, new markets, and the classification of the target markets.

- Integrating the Sri Lankan traditional wellness sector and modern health and medical tourism through institutional knowledge enhancements and strengthening both sectors with the proper route.

- Creating a structural framework for branding, product development, and positioning strategies as example Linser Hospitality co-operated with the marketing agency named FACTOR GmbH and created a brand name called “Sri Lana-Body & Mind” (“EDB’s pioneering initiatives to develop the wellness tourism industry,” 2020). As well as the industry needs to platform the current products of Sri Lanka globally.

- Targeting domestic tourists while focusing on international tourists, as domestic tourists started to appreciate the local wellness resources and experience of Sri Lanka through their travel options to local parks, hiking or travel to rural areas, and experiencing the indigenous practices of wellness experience.

- Developing a sub-sector for luxury wellness tourism as currently, Sri Lanka focuses on “affordable wellness treats” and a small number of wealthy travellers. Because of that reason the proper market segmentation and the unique product differentiation not occurs and it may be done through the luxury Ayurvedic resorts or Spa resorts development in Sri Lanka to increase the revenue generation.

Future Research

As far as now the perceptions and the motivations of wellness tourists in Sri Lanka is considered there is a big gap in the Sri Lankan wellness tourism industry. To develop a proper segment and value-added products in the wellness tourism industry, it is crucial to identify the customer profile.

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