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THE EVOLUTION OF HEALTH AND WELLNESS TOURISM, AS REFLECTED IN THE TRENDS OF TOURISM ACTIVITY INDICATORS IN SPA AND HEALTH-RESORT DESTINATIONS

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Abstract: *The paper analyzes the structural transformation of classic spa tourism towards the modern health and wellness variant, highlighted by the dynamics of the indicators of tourism activity. The results demonstrate that the strategic orientation towards flexible prevention and relaxation packages is the optimal solution for the economic revitalization of spa areas. The conclusions provide applied recommendations for destination managers and decision-makers in order to consolidate an integrated and internationally competitive tourism product.*

• Introduction

In Romania, the Strategy of 8 August 2019 for the development of spa tourism provides a reference point for discussing the modernisation and diversification of the sector. The article examines the transformation of spa tourism supply in relation to the dynamics of tourism activity. The paper addresses changes in supply and demand, differences in seasonality and the extent to which documentary evidence supports the diversification of health and wellness services through the use of accommodation establishments and the material infrastructure in the tourism and treatment sector.

• Material and method

The research combines the analysis of official statistics with a thematically oriented documentary analysis. The period analysed is 2019–2025, with 2019 serving as the pre-pandemic reference year. The statistical data are constructed on the basis of the INS “spa resorts” category. The documentary component includes the Strategy for the development of spa tourism, the literature, reports and institutional and commercial web pages, consulted up to 22 October 2026.

• Results and discussion

The indicators reveal an uneven recovery in tourism activity following the decline in 2020. In 2025, arrivals exceed the 2019 level, while overnight stays remain below their initial value. This difference is reflected in the decline in the average length of stay, from 4.24 to 3.60 nights per arrival. Meanwhile, the number of accommodation establishments and bed places increases, but capacity utilisation remains below the pre-pandemic level. The expansion of supply is therefore not accompanied by a proportional increase in overnight stays.

Table 1. Evolution of tourism indicators in the “spa resorts” category

Year	Units	Bed places	Arrivals	Overnight stays	Stay, nights	Use %	Foreign tourists %
2019	597	35,643	1,133,359	4,805,188	4.24	47.7	3.06
2020	620	36,554	601,326	2,208,832	3.67	32.5	0.93
2021	813	38,986	951,366	3,426,251	3.60	35.9	1.39
2022	890	39,940	1,117,977	4,118,822	3.68	39.6	2.37
2023	935	40,283	1,170,816	4,172,120	3.56	39.3	2.84
2024	937	40,372	1,248,678	4,251,222	3.40	39.9	3.62
2025	961	40,072	1,173,382	4,222,522	3.60	39.1	4.09

The figure shows an increase in the share of four- and five-star bed places within spa hotel capacity, from 16.5% in 2019 to 20.8% in 2025. Following the decline recorded in 2020, the indicator follows an upward trend. This development indicates a shift in the structure of supply towards higher classification categories. However, hotel classification does not directly identify wellness services and does not, by itself, demonstrate improvements in treatment quality, occupancy, or profitability.

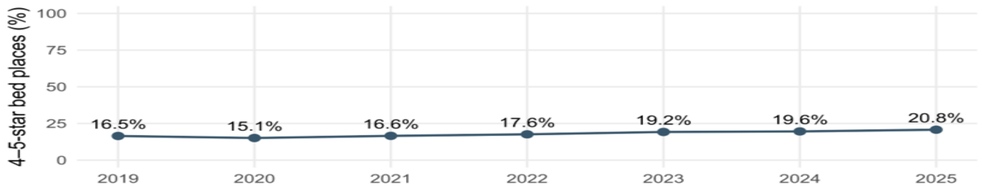


Figure 1. Share of 4–5-star bed places in spa hotel capacity

The monthly distribution of overnight stays reveals differences among the destinations analysed. Techirghiol exhibits a pronounced summer concentration, which is more marked in 2025, while Sovata has a relatively more even profile. In Băile Herculane and Sânmartin, the shares increase during the warmer months and decline towards the end of the year. Buziaș shows visible differences between the two periods, including very low shares in some months of 2025.

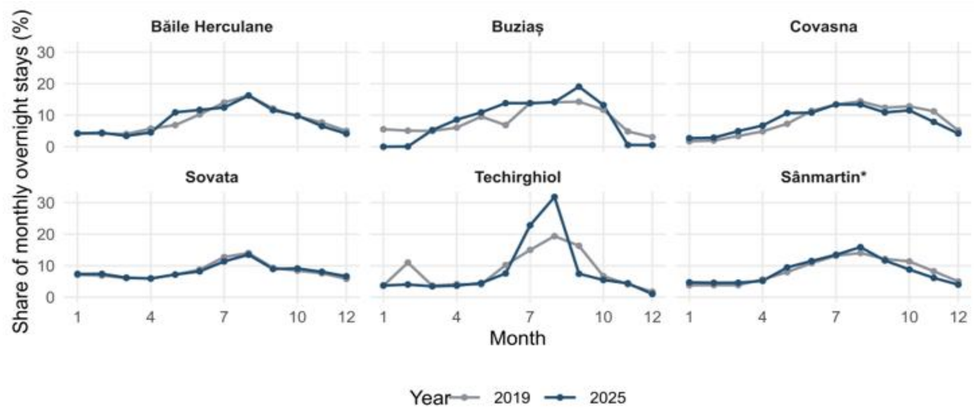


Figure 2. Monthly profile of overnight stays in the selected ATUs

The results of the two operators indicate different economic trajectories. At Turism Felix SA, declining turnover and occupancy are accompanied by a shift from profit to loss. At Tratament Balnear Buziaș SA, turnover increases and the loss narrows, although occupancy declines slightly. Changes in occupancy alone therefore do not explain the financial result. The data warrant an examination of revenue, costs, and the composition of services for each operator.

Table 2. Economic indicators reported by two spa operators

Operator	Year	Turnover, lei	Net result, lei	Occupancy %
Turism Felix SA	2023	102,170,948	1,069,903	53.33
Turism Felix SA	2024	98,329,749	-9,217,349	48.49
Tratament Balnear Buziaș SA	2023	9,008,115	-2,876,089	34.00
Tratament Balnear Buziaș SA	2024	10,409,382	-1,465,147	33.00

At Turism Felix SA, the average revenue per tourist-day increased from 393 to 422 lei between 2023 and 2024; however, both turnover and occupancy rates declined, and the individual financial result turned negative. In the case of Buziaș, turnover increased and losses narrowed, though they still persist. The operator offers a mix of subsidized social treatment, commercial products, and wellness services; its results do not reflect a model based exclusively on social provision.

• Conclusions

The documentary evidence indicates the diversification and coexistence of treatment and wellness services without demonstrating a generalised substitution. In relation to the orientation towards health, prevention and relaxation, the data support the development of a diversified supply, with uneven economic and seasonal results. Social spa treatment and medical infrastructure continue to serve distinct needs. The adaptation of packages must be assessed together with access to services, the use of investments and performance by product. A younger clientele and the general superiority of wellness profitability are not demonstrated by the available evidence