HEALTH/SPA TOURISM AND SOCIAL AND ECONOMIC REGENERATION IN MID WALES

SARA LLOYD-WRIGHT, MA.

Thesis submitted to Cardiff School of Management in partial fulfillment of the requirements for the degree of Doctor of Philosophy.

2009

Cardiff School of Management
University of Wales Institute, Cardiff
Colchester Avenue
Cardiff, UK, CF23 9XR
DECLARATION

I declare that this work has not been previously accepted in substance for any degree and is not being concurrently submitted for any other degree.

I further declare that this thesis is the result of my own independent work and investigation, except where otherwise stated (a bibliography is appended).

Finally, I hereby give consent for my thesis, if accepted, to be available for photography and inter-library loan, and for the title and abstract to be made available to outside organisations.

Signed:
Sara Lloyd-Wright (Candidate)

Professor Eleri Jones (Director of Studies)

Dr Claire Haven-Tang (Supervisor)
DEDICATION

This thesis is dedicated to my husband Jeremy for his generous love, support and encouragement in helping me to pursue the degree of Doctor of Philosophy.
ACKNOWLEDGEMENTS

I would like to express my sincere thanks and deep gratitude to my Director of Studies Professor Eleri Jones and my supervisor Dr Claire Haven-Tang for their patience and unstinting help in supporting me through the long and sometimes painful process of producing a thesis.

I have had an inspiring time in Cardiff School of Management (formerly the Welsh School of Hospitality, Tourism and Leisure Management), which was mainly due to the cooperative academic and research staff and students. I want to thank them all for every pleasant interaction and for providing immeasurable help.

I hope to take this thesis forward and influence the implementation of the blueprint and action plan identified in this thesis. I sincerely hope that the long and productive partnership with UWIC will continue.
ABSTRACT

This interpretivist study investigates the case for health/spa tourism as a driver for economic regeneration in Powys, Wales as a sustainable and competitive health/spa tourism destination to answer the following questions. What are the essential ingredients for a sustainable and competitive health/spa tourism destination? What is best practice in implementing major public-private partnership projects? Has Powys got the basic ingredients for a competitive health/spa tourism destination? What would a blueprint for health/spa tourism in Powys look like? What actions would be required of key stakeholders to achieve it?

The thesis presents a critical review of literature on destination development, biomedical and bio-psychological models of illness and their relationship to traditional and modern spa practices and stakeholder theory to develop a theoretical framework for a sustainable and competitive health/spa tourism destination.

The research adopts a case study methodology involving data collection through semi-structured and unstructured interviews, document and archival analysis, and direct observation. Data collection comprised three key phases. The first phase involved four French case studies - three - Vichy, La Bourboule, Châtel-Guyon - in the Auvergne and the fourth - Saint Malo in Brittany - to determine the applicability of the theoretical framework. The second phase of data collection involved a case study of Bath Spa to explore best practice in implementing major public-private partnerships for economic regeneration. The third phase provided an audit of selected resources in Powys against the framework to determine the feasibility of health/spa tourism as a focus for economic development.

The thesis concludes that health/spa tourism would provide an appropriate development path for economic development in Powys and develops a set of recommendations from the best practice case studies into a blueprint for health/spa tourism in Powys and action plan identifying responsibilities for key public and private sector stakeholders in implementation of the blueprint.
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<tr>
<td>AONB</td>
<td>Areas of Outstanding Natural Beauty</td>
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<td>AA</td>
<td>Automobile Association</td>
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<tr>
<td>B&amp;NES</td>
<td>Bath and North East Somerset Council</td>
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<td>BMA</td>
<td>British Medical Association</td>
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<tr>
<td>BIT</td>
<td>Borsa Internazionale del Turismo</td>
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<td>CCIP</td>
<td>Chambre de Commerce et d'Industrie de Paris</td>
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<td>CAP</td>
<td>Common Agricultural Policy</td>
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<tr>
<td>CVT</td>
<td>Continual Vocational Training</td>
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<td>CPD</td>
<td>Continual Professional Development</td>
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<td>DEIN</td>
<td>Department for Enterprise, Innovation &amp; Networks</td>
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<td>Development Board for Rural Wales</td>
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<td>GDP</td>
<td>Gross Domestic Product</td>
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<tr>
<td>HABIA</td>
<td>Health and Beauty Industry Association</td>
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<tr>
<td>HLC</td>
<td>Healthy Living Centre</td>
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<tr>
<td>Estyn</td>
<td>Her Majesty's Chief Inspector of Education and Training in Wales</td>
</tr>
<tr>
<td>HE</td>
<td>Higher Education</td>
</tr>
<tr>
<td>HND</td>
<td>Higher National Diploma</td>
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<tr>
<td>HSE</td>
<td>Health and Safety Executive</td>
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<tr>
<td>FITEC</td>
<td>International Federation of Hydrotherapy and Climatology</td>
</tr>
<tr>
<td>INFATH</td>
<td>Institute National du Tourisme et de l'hotellerie</td>
</tr>
<tr>
<td>ICT</td>
<td>Information and communication technology</td>
</tr>
<tr>
<td>IHBC</td>
<td>International Health and Beauty Council</td>
</tr>
<tr>
<td>IIST</td>
<td>International Institute of Sports Therapist</td>
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<tr>
<td>ISPA</td>
<td>International Spa Association</td>
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<tr>
<td>LHB</td>
<td>Local Health Board</td>
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<tr>
<td>MWP</td>
<td>Mid Wales Partnership</td>
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<tr>
<td>NAO</td>
<td>National Audit Office</td>
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<td>NEDS</td>
<td>National Economic Development Strategy for Wales</td>
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<td>NHS</td>
<td>National Health Services</td>
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<td>NVQ</td>
<td>National Vocational Qualification</td>
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<tr>
<td>NGOs</td>
<td>Non-governmental organisations</td>
</tr>
<tr>
<td>OJEC</td>
<td>Official Journal of the European Union</td>
</tr>
<tr>
<td>OMTH</td>
<td>Organisation Mondiale du Thermalisme</td>
</tr>
<tr>
<td>OECD</td>
<td>Organisation for Economic Co-operation and Development</td>
</tr>
<tr>
<td>PCC</td>
<td>Powys County Council</td>
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<tr>
<td>PRP</td>
<td>Powys Regeneration Partnership</td>
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<tr>
<td>RAC</td>
<td>Royal Automobile Club's</td>
</tr>
<tr>
<td>SITH</td>
<td>Societe Internationale de Technique Hydrothermale</td>
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Health/Spa Tourism as a Driver for Economic Development in Mid Wales

SMEs  Small and medium-sized enterprises
SIC  Standard Industrial Classification
HSTP  Health/Spa Tourism Partnership
SMART  Specific, measurable, agreed upon, realistic and time framed
TCF  Test de Connaissance du Français
TDC  Thermae Development Company
TPMW  Tourism Partnership Mid Wales
TVIC  Tourist/Visitor Information Centre
Uccimac  Union des Chambres de Commerce et d’Industrie du Massif Central
UK  United Kingdom
UN  United Nations
UNCED  United Nations Conference on Environment and Development
USA  United States of America
USV  Upper Swansea Valley
USP  Unique Selling Proposition/Point
UWIC  University of Wales Institute, Cardiff
UV  Ultra-violet
VLE  Virtual Learning Environment
VW  VisitWales
WAVE  Wales: A Vibrant Economy
WTB  Wales Tourist Board
WDA  Welsh Development Agency
WEFO  Welsh European Funding Office
WAG  Welsh Assembly Government
WO  Welsh Office
WHO  World Health Organisation
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CHAPTER ONE

INTRODUCTION

1.0 INTRODUCTION

I am Head of School of Beauty Therapy, Sports Therapy, Holistic Therapy and Hairdressing in a major college of further education in Mid Wales – Coleg Powys. This chapter shows how my work in this college and for the PhD has evolved from the core business of education and training to the identification of development opportunities for the college during which key public and private sector stakeholders in the health, fitness and wellness sector of Europe and the UK were identified.

My unique knowledge, skills and experience of the public and private health fitness and wellness agenda in the twenty-first century encouraged me to look at the problems within this agenda in a particular way. My research in Europe and the UK and particularly in European Spas, which goes back to the late 1970s, gives me a unique insight and perspective into health/spa tourism as a potential economic activity in rural areas. I have developed a great understanding and empathy for the people of Mid and South Powys and I am now using the opportunity to undertake an in-depth study to exploit my knowledge and skills in an attempt to benefit the local communities in these areas.
This chapter will look at past European Union (EU) programmes developed to support health/spa tourism training in Powys and explore the potential of an economic development future for Mid and South Powys that is consistent with its rural idyll past. It presents a research opportunity and knowledge gap that I am uniquely placed to respond to. I want to use this opportunity for undertaking a PhD to explore the potential of resolving the problem of marketing the now-defunct industrial south of Powys as a regenerated agrarian and rural region. In my view South Powys could act as an important health/spa tourism gateway to a recognised spa trail through the Brecon Beacons National Park to the historic spas of Mid Powys up as far as the Elan Valley. This means of incorporating all of the main tourist attractions to the area by creating a spa regeneration programme would provide a vehicle that cherishes all that the area has to offer and is consistent with the ambitions of published national policies on both health and tourism. The policies concerning Wales regarding health issues are highlighted in the Health Act 1968 and section 196 of the National Health Services (NHS) (Wales) Act 2006. In addition, the WAG 10-year vision for creating world-class health and social care in Wales in the 21st century is shown in its publication Designed for Life. It was launched in May 2005 and describes the kind of health and social care services the people of Wales can expect by 2015 and indicates how these can be developed. Its primary focus is on health services and health improvement (with progress towards this vision being reviewed in 2008 and in 2011). This vision for health is reiterated in the One Wales document produced by the Labour and Plaid Cymru Groups in the National Assembly (2007) to underpin their agreement to form a merged government for Wales:

*We aspire to a world-class health service that is available to everyone, irrespective of whom they are or where they live in Wales, and at the time when they need it. Our health services must inspire confidence in the people of Wales that they will receive the best care available.*

(Labour Party Wales and Plaid Cymru 2007:8)
The policies regarding tourism are highlighted in the WAG National Economic Development Strategy (2004:2):

- **To achieve a prosperous Welsh economy that is dynamic, inclusive and sustainable, based on successful, innovative businesses with highly skilled, well-motivated people;**

- **To achieve this, we must recognise the inter-dependence between the economy, lifelong learning, communities, the environment and other policy areas such as health and transport;**

- **To work with our partners to enhance the attractiveness of the Welsh countryside, its bio-diversity and celebrate its heritage, for the enjoyment of our people and as a basis for tourism;**

- **By implementing Achieving Our Potential – A National Tourism Strategy for Wales (2006-2013)**

  Welsh Assembly Government (2002a:2)


1.1 THE SCHOOL OF BEAUTY THERAPY, SPORTS THERAPY, HOLISTIC THERAPY AND HAIRDRESSING: COLEG POWYS

The School of Beauty Therapy, Sports Therapy, Holistic Therapy and Hairdressing (The School) is based in Coleg Powys Llandrindod Wells. Before the emergence of Coleg Powys in 1998 there were three separate Colleges serving Powys: in Newtown in the North of the County; in Brecon in the South of the County; in Radnor in the middle of the County. I was employed in Radnor College and was also an International Examiner for the International Health and Beauty Council (IHBC) where I adapted IHBC qualifications to the National Vocational Qualification (NVQ) format. In 1998 the college was made a National Centre of Excellence by IHBC and I was appointed onto
the Lead Industry Body for Health and Beauty (The Health and Beauty Therapy Training Board). This enabled me to directly work with industry, responding to their training needs and subsequently tailoring courses accordingly.

As a direct result of this activity the college successfully bid in 1989 for a European Social Fund (ESF) Innovatory Project for the training of Leisure Centre Staff in the vocational skills of Health, Fitness and Sports Therapy and was awarded a grant of £365,000. The project was completed in 1991. The outcome was a national pilot project for the International Institute of Sports Therapist (IIST) to test the feasibility of their new Diploma in Health Fitness and Sports Therapy which was incorporated into the Innovatory project.

1.1.1 COLEG POWYS AND THE EU PARTNERSHIPS

European funding leads inevitably to partnership and the expertise I had gained from the national pilot project and, in particular the enterprise contacts I had made, led to Coleg Powys being invited to join a European Commission (EC) Article 10 project entitled: A Study and Evaluation of Health Spas as Potential Generators of Economic and Tourism Activity as a partner. The Wales contingent for the Article 10 project constituted four delegates who represented the following organisations: Coleg Powys, District Council of Brecknock, District Council of Radnor, and PCC. This project, like all EC projects, required participating partners from other European countries, who in the first instance, shared similar geographic and economic problems and secondly and most importantly were regions that had health spas that for various reasons were not reaching their perceived potential as generators of economic and tourism activity. The participating countries were Wales, Ireland, Spain, France, Portugal and Italy. All of the partners, apart from Wales, had established spa industries which in most cases
(apart from Southern Ireland) were supported by their governments who provided part-
finance for treatments.

During the first meeting of all the partners in Paris, each country was invited to share
their problems with a view to establishing a series of tasks for each partner to
undertake which would support the common goal of the regeneration of their health
spas. Upon learning that Powys had only a few defunct wells and just one run-down
treatment room in the historic spa grounds of the Rock Park Spa in Llandrindod Wells
(which was supported by the local authority - PCC) the partners were initially uncertain
whether Powys should be included in the project. However, after some persuasion by
the Powys contingent, the partners took the pragmatic view that since the EC-funded
project demanded the collaboration of six countries the partnership with Wales would
continue. The partners concluded that since Powys had no real understanding of
traditional European Health Spas the best contribution to the project by the four-strong
Powys contingents would be to undertake a fact-finding study tour of the partner
countries' spas. Thus, the Powys contingent fulfilled their obligation to the Article 10
project by undertaking a study tour of the spa regions of France, Italy and Germany.
During the tour selected industry representatives and enterprises were interviewed by
the Powys team about their training policies at an operational level and vital contacts
and relationships with Spa enterprises in Europe were established.

At a second briefing meeting of the partners in Paris some weeks later it became
apparent during discussions that whilst the other partners had major superstructures
and infrastructures within their countries to support their traditional spas the partners
were seeking ways to move away from traditional spa treatments (which required
government funding) and move to more modern spa treatments (such as holistic and
beauty therapy). We also discovered during the meeting that traditional spa treatments
were taken annually by mainly an older population and were not meeting the needs of a new generation of consumers who viewed spa regions as destinations for the sick and elderly. At this point the Powys team seized the opportunity to brief the meeting about the Coleg Powys Centre of Excellence and the training of Beauty Therapy, Sports Therapy Holistic Therapy and Hairdressing and suggested possible training and qualifications which might be of interest to the partner countries, in the light of their expressed intentions. The qualifications we selected would train staff and underpin their aspirations to move away from traditional spa treatments to modern spa treatments which could support an emerging European interest in a holistic approach to health and wellness.

At a third meeting in Paris the proposition by Coleg Powys that European Spa enterprises could benefit by incorporating the Health and Fitness Therapy (IIST Certificate and Diploma in Sports Therapy) qualifications which had been developed by Coleg Powys into their range of activities was accepted. It was also agreed that representatives from each of the partner countries would visit Coleg Powys in order to gain an understanding of the full range of Health and Fitness training delivered at the College and to see the extensive range of equipment and materials which would be required to facilitate such training in their own countries.

Following the study tour in March 1991 I was invited to speak at the first ‘Qualify for Tourism’ European Conference held in the Queen Elizabeth II Conference Centre: London. Coleg Powys demonstrated the importance of training in this field and the idea of health and wellness tourism was well received. This theme was explored in more detail at the first European conference in Thermalism which took place in Auvergne in November 1991. My research showed that:
Enterprises that collectively made up the European Health/Fitness/Spa industry did not invest in training at operator/technician level within the UK or in other European Member States;

- If health/spa tourism was to become a viable option in spa regions then training in this area was crucial to the development of an international spa/tourism destination;

- EU member states would need develop a European-wide consensus on the necessary training programmes to enable mobility of employees;

- Training products could be developed and tested within the enterprises already identified.

These findings, accepted by the conference, led to asking certain trans-national enterprises to come together and form a European Consortium of Health and Fitness to examine in more detail the concepts of spas as generators of tourist activity. This involved looking at spas in France, Italy, Germany, Spain and Southern Ireland as vehicles for economic and social regeneration. These countries were selected on the basis that they held Objective 5b status as did Powys.

These relationships gave me a sound basis from which I derived standards of good working practice and identified training and skill needs. More importantly, was the recognition that small and medium-sized enterprises (SMEs) had an opportunity to participate in the commodification of products for what I perceived to be a growth industry for the 21st century. As I discovered in the previous Article 10 project, European funding leads inevitably to partnerships and from the European Consortium of Health and Fitness emerged appropriate partners to prepare a successful bid for an EU FORCE project.
1.1.2 EU FORCE AND FORCE/EUROFORM PROGRAMMES IN POWYS

The EU FORCE programme was the first European programme to focus on continual vocational training (CVT) for people in employment. It provided an important new opportunity for companies, and their training providers, who were not hitherto used to the idea that EU funds were available to them. The partner countries involved in the Coleg Powys programme included France, Italy, Germany and the UK which exemplified the interaction between EU programmes. The EU FORCE project partnership supported the establishment of a European network of innovative projects to effect transfer of know-how and experience relating to spas between regions. This partnership, which consolidated regional planning projects, led directly to development in various European spa locations. The EU FORCE/EUROFORM project reinforced the FORCE project and enabled new ways of co-operation between member states to develop common multi-media and innovative products for training purposes.

As Project Coordinator for the FORCE and FORCE/EUROFORM project I was required to produce a series of written reports which underlined the work that I carried out in Brussels, Spain, Portugal, France, Italy, Southern Ireland and the UK following successful projects. The EU published reports were disseminated by way of presentations at international seminars, these included:

- **Thermauvergne: First European Conference on Thermalism (1991) Chatel Guyon, Auvergne, France:** Presentation Title: *An International Model of Health Tourism.*
- **World Health Organisation (WHO) Conference Spa; Present and Future (1992), Saint Vincent Italy:** Presentation Title: *Training for Regional Development in Europe.*
- **Union des Chambres de Commerce et d’Industrie du Massif Central (Uccimac) First European Forum for Green Tourism Conference (1992)*
The Forum Train through the Massif Central France: Presentation Title: Training for Green Tourism Operators.


- ‘Qualify for Tourism’ European Conference (1991) Queen Elizabeth Centre Westminster. Presentation Title: Health Tourism and the Resurgence of Spa Towns.

- EU FORCE/ EUROFORM Conference (1992) Brussels Presentation Title: The Training needs of the Health and Spa Industry across Europe

- International Termalism Conference (1992) Portugal New Opportunities for European Spas through Health Tourism

- EU Eurospa Conference, (1993) Brussels; Making an International Model of Health Tourism Work

Following the successful completion of the FORCE and FORCE/EUROFORM programmes I was seconded from Coleg Powys (1991-1992) to the EU Task Force for Human Resource, Education, Training and Youth in Brussels. My remit was to examine the needs of the health/spa tourism sector across the EU in terms of qualifications and provisional training at EU level and to create a system of transnational validation for personnel working in the health/spa tourism sector and spa industry of France, Italy, Germany and the UK. Through this consultancy work I established good working relationships in trans-national projects where I was responsible for creating networks between SMEs, training providers and government representatives culminating in effective working consortia. The objectives of, and skills involved in, this form of project are to enable a number of partners from very diverse cultural backgrounds (and in this case they included educationalists, industrialists and entrepreneurs) to come together, agree the parameters of the work, recognize the potential outcomes and then transfer them back to their national context.

Following the secondment, my role and that of the college was to support industry by having the right qualifications at the right time, so it made sense to support economic and social regeneration to provide pathways from NVQ to Higher Education (HE). To
fulfil this need Coleg Powys went into partnership with Professor Eleri Jones at University of Wales Institute, Cardiff and developed initially a Higher National Diploma (HND) in Health, Fitness and Holistic Therapies Management, the first of its kind in the UK. In 2005, the HND was further developed into a Foundation Degree in Health, Fitness and Holistic Therapies Management to support the needs of the burgeoning Health Fitness and Spa industry in the UK and beyond. The HND and Foundation Degree programmes are generating a potential stream of qualified managers to support an emerging spa industry in Mid Wales.

1.1.3 KEY FEATURES OF THE HEALTH, BEAUTY AND SPORTS THERAPY INDUSTRY

In the UK the turnover for the health, beauty and sports therapy industry reached £3.4 billion in 1999 and the latest MINTEL International Group Ltd. figures suggest the industry reached over £4 billion in the UK (2001) cited in HABIA (2002) at the time of writing (2008) these are the latest reports published by the UK Beauty Therapy industry. Over 215,000 people work in the hairdressing and beauty industry (Economic and Social Data Service, 2000) and statistics show that there are 74,040 businesses operating in the UK in hairdressing alone. In fact, Dermalogica International Research (2006) has shown that after computing the spa industry is the fastest growth industry in the Western world. The current prediction is that hairdressing and the beauty industry in the UK will have a turnover in excess of £5 billion by 2010. Ironically enough, however, there are still serious skills shortages (HABIA 2006). It is also worth noting that although traditionally low paid, qualified people’s salaries in the hairdressing and beauty industry range from £300-£400 pounds per week and top performers can, and do, reach £50,000 per annum.
1.1.4 THE SCHOOL WORKING WITH AND RESPONDING TO INDUSTRY AND COMMUNITY NEEDS

Emerging from these projects was a recurring theme for the School: that of connectivity, for example, first by connecting with the community, second by connecting with industry and assessing its needs, third, connecting with agencies concerned with economic and social regeneration and finally and importantly connecting with higher education. To continue to be successful the School needed to increase its connections and did most recently (2006) with the National Health Service (NHS) where the School established a Remedial Cosmetology and Disfigurement Clinic through a bilateral agreement between Coleg Powys and the Powys Local Health Board (LHB). Thus the skills of the students in this way can be put to direct use by servicing the needs of the local community while the Health Board maximises local resources, efficiently and effectively. In addition the School warmly welcomed the supplementary income generated by this activity. See Figure 1.1. Map showing the location of Coleg Powys Llandrindod Wells Campus.

Figure 1.1: Map showing location of Coleg Powys School of Beauty Therapy, Sports Therapy, Holistic Therapy and Hairdressing Llandrindod Wells Campus (Coleg Powys Llandrindod Wells Location Map 2006)
As a member of the PCC Local Futures round-table, I focussed on the concerns of the indigenous population in Powys and the promotion of Healthy Lifestyles out of which sprang a Healthy Living Centre (HLC) in Ystradgynlais. Located in the heart of one of the more deprived estates in Wales the HLC allows the School direct access to potential learners, particularly women returnees and those finding it difficult to get into the workforce. Coleg Powys has established an outreach centre in the town of Ystradgynlais and the School’s contribution has been to provide courses from Foundation level to Degree and offer specialist advice to enable learners to set up and manage their own businesses.

The learning experience for the Health, Fitness and Beauty and Spa industry is not just about skills, it is also about business acumen. Throughout the Schools’ four sites in Newtown, Llandrindod Wells, Brecon and Ystradgynlais the School runs major commercial enterprises, with over 2,000 clients on the data-base in Llandrindod Wells alone where spa and holistic therapy treatments bring a major source of income to the college and give the learners a sound industrial experience.

The school has in recent inspections been consistently awarded Grade 1 by the office of Her Majesty’s Chief Inspector of Education and Training in Wales (Estyn). Given this success and continuing industry demand the school could work on a trend analysis to hone the training on offer and supply graduates for increasing segments of the market. But in fact rural Powys faces now its greatest challenges - demographic changes have led to an increasing cohort of elderly people in a dwindling population; agriculture has declined in importance; the tourism market has become increasingly competitive – all suggest that if there is to be a successful community life in Powys in the future, the regions of Mid and South Powys need a new paradigm for economic regeneration. An example of this is agriculture which has been a major activity in the Powys region for
centuries, but in the recent past relied heavily on European, National and UK direct subsidies which are likely to change with the reform of the Common Agricultural Policy (CAP) in 2008. In a nutshell, therefore, the problem is how to achieve a future for the area of Powys which is consistent with the unique natural attributes of the area and the ambitions of the local people and an economy that is commensurate with those ambitions: spas can potentially make a contribution to that.

This study focuses on the feasibility of health/spa tourism as that new paradigm for economic development and development of health/spa tourism as a vehicle to exploit the natural resources of Powys and develop a unique selling point (USP). This study will show, through case studies in France, Bath and the spas in Powys, that with proper planning and co-operation between appropriate public-sector agencies, the establishment of a spa region in Powys could create a distinct branding offering a healthy lifestyle to both visitors and the indigenous population.

1.2 A BLUEPRINT FOR HEALTH/SPA TOURISM IN POWYS

Developing a blueprint for health/spa tourism in Powys in a sense is a regeneration of the old spa offer and exploits the modern pre-occupation with whole food, global warming and the whole ‘green’ agenda. Within the capacity of this blueprint, Powys could create a future with strong participation of the local community firmly based on the natural attractions of the area. It needs to be cognisant of the market opportunities and to respond to individual consumer needs therefore providing opportunities for spa treatments delivered in a modern rather than traditional formats – as promoted through Beauty Therapy, Sport Holistic and Fitness Therapy programmes – i.e. reflexology, aromatherapy and stone therapy treatments. These treatments could be complemented by a range of activities in the natural environment – e.g. walking,
cycling, fishing, golf and canoeing. Clearly all of this needs to be underpinned by quality accommodation, quality local services, quality food and drink, but the clear implications of such a scenario are the need for co-operation between private and public sectors with a shared vision. Offered carefully this vision could provide local manufacturing and servicing opportunities by creating long-term alternatives to the reliance on agriculture and could put Coleg Powys and UWIC at the heart of research and training needs.

The School has shown from its commercial enterprises that there is a demand in the care sector and that it grows in response to the provision of excellence. Elements of the blueprint may emerge incrementally from individual enterprises. A good example of this is Llangoed Hall Hotel in Builth Wells - opened 1990 and situated in the heart of Powys. Llangoed Hall is the first hotel in Wales to be awarded a 5* star rating (1999) by the Wales Tourist Board (WTB). Additional accolades include three rosettes for "very fine food" from the Automobile Association (AA) Wine List of the Year, Egon Ronay's Wine Cellar of the Year, Wine Spectator Magazine's award of excellence, the Royal Automobile Club's (RAC) Blue Ribbon Award for Hotels. Powys would however, be missing a genuine opportunity if it overlooked a need to act coherently and collaboratively to develop a health/spa tourism blueprint for Mid and South Powys.

This study will show how health/spa tourism would allow economic regeneration for the once-industrialised region of Ystradgynlais and South Powys and support an area that is rapidly returning to its once natural and beautiful form. The study will show how the old spa regions of Mid Powys can benefit from providing modern spa treatments and how a form of economic activity can be derived, dependant on the regions natural resources, but without, as in the past, altering the nature of the scenery, its ambience, its communities and its outstanding natural features. Importantly, the region has an
indigenous population who have shown a willingness to learn and have achieved 100% pass rates in the courses undertaken through The School in Ystradgynlais. This has been demonstrated by the numbers attending training schemes to help people up-skill in the light of the closure of the last major industrial employer in the South Powys area when the company re-located to Eastern Europe.

For Wales, the WAG determines business support, education and training, infrastructure development, land-use planning and other major policies that affect Wales. As part of the renewal and re-invention challenge announced and embraced in WAGs National Economic Development Strategy of the Welsh Assembly Government document A Winning Wales (2002) which states:

the most significant opportunities for economic development emerge from the rich and diverse culture and heritage of Wales, which adds to the quality of life and which provides a wide range of economic opportunities

Welsh Assembly Government (2002a:4)

In addition, a new strength of focus for WAG and its public sponsored bodies will be to:

provide a unified and integrated approach, in which policies and programmes within the public sector add value to one another. Wales has important selling points in the form of its diverse natural, rural, urban and historic environment, its quality of life, its quality of schools and higher/further education sector and its lower levels of traffic congestion relative to other parts of the UK.

Welsh Assembly Government (2002a: 6)

The report goes on to say:

the Assembly's commitment to sustainable developments points us in the direction of green growth sectors including clean and renewable energy, low carbon technologies, environmental products and services and green tourism

Welsh Assembly Government (2002a:7)

This statement clearly shows a real intention and commitment by WAG to support policies and strategies for new economic development which will enable a reversal of the current under-performing Welsh economy which is lagging behind most other UK
regions. The study will also show how the concept of health/spa tourism as such a vehicle for economic regeneration in Powys meets the criteria of first the WTB's vision for Wales as stated in its Annual Report *Vision in Action* (2000-2001) (WTB, 2001b: 5) opening statement says that the principles of sustainability, quality, competitiveness and partnership are at the core of the WTB's vision which is: 'to enrich the lives of the people of Wales, through tourism'.

*Achieving Our Potential* (2006-2007), the National Tourism Strategy for Wales (WTB, 2001a) was launched in April 2000 and defined as a vision for tourism up to 2010. In April 2006 the Welsh Development Agency (WDA) and the WTB came under the control of the WAG and named the Department of Enterprise, Innovation and Networks. The strategy sets out four priority areas for action:

- Marketing
- Exceeding visitor expectations
- Improving skills
- Achieving sustainable growth

Following the input of a new round of the EU Structural Funds Programme the National Tourism Strategy for Wales will be extended from 2010 to 2013, the vision for 2013 reads:

*A mature confident and prosperous industry which is making a vital and increasing contribution to the economic, social, cultural and environmental well being of Wales. By achieving sustainable growth through effective co-ordination and collaboration at all levels of the industry*

(Wales Tourist Board, 2000:3)

Former WTB Chairman (2000-2006), Philip Evans, enforced this view with his own vision for the future of tourism in Wales when he suggests that Wales has to change its tactics and posits the question "how do we compete globally"? He suggested that
Wales needs to create international exemplar products and a 'feel Wales' strategy'. He went on to sum up what Wales means to many people:

> When I walk into the Millennium Stadium, the hairs on the back of my neck stand up. I can feel Wales. I drive up the west coast of Wales, I have to stop and soak in the view. I can see Wales. Someone addresses me in a cosy rural pub with wry humour and I can hear Wales. Now what we have to do is mirror that in the product, we have to create the product, five star hotels, five star roads, five star welcomes. But 'five star' is also an attitude, we need to create all this with a Welsh feel and with Welsh feeling. That's what it is all about.

(Wales Tourist Board, 2000:4)

This study will seek to create a blueprint showing the opportunities for economic regeneration in Ystradgynlais and the spa regions of Mid and South Powys through the branding of health/spa tourism that has a 'Welsh feel with Welsh feeling' that can be supported and taken forward by the key stakeholders in Powys who would in turn create a new vision for this beautiful part of Wales.

1.3 RESEARCH AGENDA

The agenda for this research study is to investigate the case for health/spa tourism as a vehicle for economic regeneration in Mid and South Powys and to develop an appropriate model for exploiting health/spa tourism for economic regeneration in Mid and South Powys.

The study will attempt to answer the following research questions:

- What are the essential ingredients required to facilitate the regeneration of the health/spa tourism industry?
- Have the regions of Mid and South Powys got the basic ingredients required to be a player in the health/spa tourism market?
- What additional ingredients and requirements does Mid and South Powys need to bring about a successful economic regeneration through health/spa tourism?
- What would a blueprint for health/spa tourism in Mid and South Powys look like? And what actions would be required by stakeholders to achieve it.
Three regions are researched and developed into case studies, they are:

1. Mid and South Powys including Ystradgynlais.
2. Bath Spa Millennium Commission Project;

The case studies of the Bath Spa Millennium Commission and Spa regions of France: the Auvergne and Saint Malo are used as exemplars of different approaches to health/spa tourism. The lessons from the case studies will be used to inform the theoretical framework and to provide a model for the auditing of resources in Mid and South Powys. Selected facilities will be developed into spa trails to provide a focus for the development of the area as a health/spa tourism destination. This will be, in effect, a blueprint for economic regeneration, but its planning and execution will have to be consistent with public-sector funding streams. In particular the WAG and through the local authority PCC and the plans for the use of EU Structural Funds for the period 2007-2013 Convergence Funding which requires consistency with the area plans.

The study will scope a blueprint for a new regional identity for Mid and South Powys, exploiting health/spa tourism as a vehicle for economic regeneration in the region involving cross-sector clusters of small medium enterprises (SMEs) and larger businesses. The branding for this initiative would exploit and enhance the unique characteristics of Wales and the clean reputation already promoted through the ‘organic’ focus of the WDA agri-food initiatives and the WTB marketing campaigns, extending this from the agri-food and tourism sectors into manufacturing, pharmaceuticals and beyond.
Chapter 1: Introduction

The blueprint will provide a rationale for developing and marketing a range of health and spa tourism related products and will identify opportunities for new business start-ups and existing SME growth and development as well as attracting inward investment. The blueprint will show how this could lead to the creation of high quality, well paid jobs for local people in a number of sectors, including: light manufacturing, pharmaceuticals, and complementary therapies, professions allied to medicine, agri-food and tourism. The blueprint will also promote the exploitation of natural resources and local products and will exploit appropriate information and communications technology and environmentally sound technologies.

1.4 AIMS AND OBJECTIVES

The aim of this thesis is to develop a framework for a competitive health/spa tourism destination in Mid Wales. To explore the potential of health/spa tourism, and specifically a spa trail through the development of a blueprint this will be achieved through the following five specific objectives which are to:

1. Undertake a critical review of relevant literature on health/spa tourism and destination competitiveness to develop a theoretical model of best practice for a competitive health/spa tourism destination.

2. To identify and analyse case studies of traditional and remise-en-forme health/spa tourism destinations in the Auvergne region and Saint Malo in France to provide an in-depth analysis of specific elements of the framework for a competitive health/spa tourism destination developed in objective 1.

3. To identify the key issues in the implementation of a major public/private sector spa tourism regeneration project.
4. To audit the resources in Mid and South Powys which can be exploited for the development of health/spa tourism trails and thus regenerate Mid and South Powys as a health/spa tourism destination and contribute to its economic regeneration.

5. To develop a blueprint for the economic regeneration of Mid and South Powys using the vehicle of health/spa tourism and focusing on the development of a spa trail.

1.5 OVERVIEW OF THESIS

CHAPTER ONE has introduced the thesis and provides a context for this research study. It outlines the previous work and research of the author in both the UK and in Europe. It looks at the key features of the Beauty, Sport and Holistic Therapy industry, and the possibilities of health/spa tourism as an economic vehicle in a Powys context. It moves on to discuss the thesis research agenda together with the aims and objectives of the thesis. The chapter concludes with this overview of the thesis.

CHAPTER TWO provides a more detailed overview of the Mid and South Powys context for this study and its historic development from its recent industrial past. The study considers government reports which support tourism as an active driver for the rural economy in Wales and identifies studies which identify a lack of regional definition as a recognised barrier to maximising the exploitation of tourism. It continues to look at the current economic and employment positions of the region of Powys and in particular the anomalies of European funding twinned with employment problems which affect Mid and South Powys. Finally this chapter looks at the natural assets in Mid and South Powys and identifies the key stakeholders in any development proposal to
support the possibility of health/spa tourism as an economic driver for regeneration in Powys.

CHAPTER THREE presents a critical review of literature and culminates in the development of a theoretical framework for health/spa tourism based on the Ritchie and Crouch model of a competitive tourism destination but adapted for health/spa tourism destination. It explores the concept of health tourism, the polarity of the terms health and illness through a health psychology model and their reflection in alternative approaches to the health/spa concept, and the social and economic benefits of health tourism. The critical role of stakeholders in the implementation of major projects is explored through a consideration of stakeholder theory and its implications.

CHAPTER FOUR unpacks the objectives and discusses the methodology to be adopted in this study. The study comprises three key phases. The first phase involves case study research exploring three best practice exemplars of health/spa tourism. First in France, the Massif Central Auvergne region and the spa towns of Vichy, La Bourboule, Châtel-Guyon and then moves to the Brittany resort of Saint Malo. The second case study is of the City of Bath Millennium Spa. The case studies are presented in CHAPTERS FIVE AND SIX. The second phase of the research is an audit of selected resources in Mid and South Powys which can be exploited to develop spa trails which will support the branding of the area as a health/spa tourism destination and is presented in CHAPTER SEVEN. The third phase of the research is a creative phase and brings together the lessons learnt from the case studies into a blueprint and action plan for the development of Powys as a health/spa tourism destination. This phase is presented in CHAPTER EIGHT.
CHAPTER NINE reviews the objectives and identifies the major findings of the study and its contributions to theory and practice.

CHAPTER 10 reflects on the research process. It identifies the tensions between the different potentially conflicting roles of the researcher – resident, practitioner and researcher and the implications for objectivity and subjectivity. It discusses objectivity and subjectivity from each of the perspectives and the context for the study as a peripheral area not represented in key policy-making arenas. It reflects on the appropriateness of the French case studies and of Bath Spa as exemplars to inform the Powys blueprint and action plan concluding that, with some reservations, they provide useful guidance for the Powys case. The chapter concludes with the identification of limitations and opportunities for further research.
# CHAPTER 2

## SOUTH AND MID POWYS:
The Context

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CHAPTER TWO

SOUTH AND MID POWYS: THE CONTEXT

2.0 INTRODUCTION

This chapter will explore the justification for health/spa tourism as a unifying concept for the economic and social development within South and Mid Powys. Section 2.1 paints a pen portrait of the County of Powys and identifies the region as one with extensive natural assets commensurate with the promotion of health and wellness. Section 2.2 explores the location of South Powys in terms of its political, economic and geographical anomalies which prevent the economically-disadvantaged towns in the south of Powys, notably Ystradgynlais, from accessing the more favourable EU Objective 1 Structural Funding enjoyed by its close neighbours. Section 2.3 moves on to review the history of economic development in South and Mid Powys and in particular notes the detrimental effects of those developments on the South Powys town of Ystradgynlais and looks at the problems of economic regeneration for Powys in the light of less favoured EU funding in the town of Ystradgynlais. Section 2.4 continues in Ystradgynlais in South Powys and focuses on the employment problems the town faces due to a largely untrained and unskilled workforce.

Section 2.5 looks at EU funding in regeneration projects and Section 2.6 moves onto view the prevailing health inequalities, social care and well-being issues in Powys and describes the setting up of a Healthy Living Centre (HLC) in Ystradgynlais following its designation as a Communities First area. Section 2.7 explores the current impact of
tourism on the locality and the national tourism policy context for economic and social development of the County. This section moves on to propose health tourism as a vehicle for economic and social development in South and Mid Powys with the added benefit of raising awareness in the indigenous population of the nature and benefits of a healthy lifestyle and the natural resources on which they can draw through recreation to achieve healthy lifestyles and not least would provide employment. Section 2.8 is a summary of Chapter 2.

2.1 THE COUNTY OF POWYS

Powys covers approximately a third of the land mass of Wales and has been described by the WTB as ‘undiscovered’. The WTB and PCC tourist promotional brochure, Heart of Wales (2005), described the region in its opening paragraph as:

The Heart of Wales is a secret - just waiting to be shared. There is always a welcome, and an invitation to be let in on our best-kept secret. A serenely beautiful area where every turn leads to further secret places with wonderful vistas and an unhurried pace of life. Beautiful countryside beckons around every corner, from rugged upland scenery to peaceful villages. The invigorating air as clear and clean as a glass of sparkling water acting as a tonic - an antidote to the pressures of today.

The county of Powys (see Figure 2.1 map of Powys) has large expanses of countryside, clean air, a moderate climate and outstanding lakes and reservoirs. The county has many features which complement this beautiful, peaceful environment these include natural resources such as therapeutic minerals and springs which have been known since Roman times. Powys is an upland region of moor-land cut by river valleys, in which towns and villages are set. The moor-land contains isolated hamlets and individual farms; it is largely an unspoilit area with mountains, rolling hills, clean rivers, woodland, waterfalls and abundant wildlife. It is the most sparsely-populated county in England and Wales with a population of 126,354 (Powys County Council
2003) giving a density of only 24 people per sq km. Wales is home to 2.9 million people making up just 5% of the UK population (Directgov, 2005) and has an average population density of 141 inhabitants per sq km.

The county of Powys incorporates the ancient counties of Montgomeryshire, Radnorshire and Breconshire covering 2,000 square miles and extending from the edge of Snowdonia in the north to the Upper Swansea Valley (USV) in the south. To the west lies the Cambrian mountain range, and to the east there is an eighty mile border (much of it close to the ancient earthworks of Offa’s Dyke) which is shared with England.

There are, a number of spa towns in Mid-Powys they are: Llandrindod Wells; Builth Wells; Llanwrtyd Wells and Llangammarch Wells. These towns bear an architectural elegance synonymous with English spa towns, for example, Bath, Buxton and Droitwich. However, unlike their English counterparts, they have not retained a spa culture or image and only Llandrindod Wells retains a treatment room (see Figure 2.1 Map showing the location of historic spa towns in Powys).
Figure 2.1: Map showing Powys and the historic Spa Towns in Powys

The county boasts historic castles and award winning show caves which are situated outside the town of Ystradgynlais which is the gateway to the Brecon Beacons National Park. Powys is characterised by three main features:
• a sparse population that is the second lowest in the UK, (Directgov, 2005);
• a largely agrarian economy; and,
• an outstandingly beautiful countryside that includes a National Park.

Powys' exceptional environmental quality provides an important backdrop to current employment and training patterns, however, it is these very features that dually impose both constraints to and opportunities for, future economic regeneration. Within that general description, the town of Ystradgynlais stands out as the only part of Powys that developed a reliance on heavy industry.

2.2 SOUTH POWYS GEOGRAPHIC LOCATION IN TERMS OF THE POLITICAL BOUNDARIES OF THE COUNTY

The town of Ystradgynlais is located at the southernmost tip of the county of Powys one of the towns' significant problems lies with its political geographical location (see Figure 2.1 map of Powys). The town shares its geography and functionality with the industrial towns of Neath, Port Talbot and the City of Swansea in the lower Swansea Valley and looks to these neighbouring towns for its economic benefits; however, it is forced to look north for its administrative and political centre in Powys, the reasons for this are complex. Ystradgynlais Rural District Council was first created under the provisions of the Local Government Act (1894), and was established in the District of Brecknockshire (later to be known as Breconshire); during 1974 the county of Powys was established and merged the three former counties of Breconshire, Montgomeryshire and Radnorshire. Ystradgynlais had relatively little in common with its agrarian neighbours in Mid-Powys except that it was included within the administrative boundary of Powys. With the county town over 50 miles away in
2.3 THE PROBLEMS ASSOCIATED WITH ECONOMIC REGENERATION IN SOUTH AND MID POWYS

The issues of its political geographical location give Ystradgynlais add significantly to the problems which affects its prospects of economic regeneration. It has in fact four distinct difficulties. The first is the historic image of Ystradgynlais and South Powys as an industrial region which is not in keeping with agrarian spa region of Mid Powys. The second is the concomitant impact of the choice of Ystradgynlais to be with Powys which puts the town in the geographic less-favoured location in terms of attracting major EU funding which is enjoyed by its industrial neighbouring towns (see Figure 2.2 map giving details of key infrastructure and some of the types of funding support available in different areas of Wales).

Figure 2.2: EU Objective Funding in Wales (Welsh Assembly Government 2006b)
The third issue relates to the poor health, social care and well-being affecting the population of Mid and South Powys, Welsh Office (1998) and Monaghan et al (1999). The fourth problem for Ystradgynlais is a workforce with a former dependence on a single industry i.e. coal mining which post-industrialisation has left people who are ill-equipped for the multiple skill demands of the twenty-first century. The following sections will describe the history of the emergence of these problems and their effect on the region.

2.4 SOUTH POWYS TOWN: YSTRADGYNLAIS

Ystradgynlais has a population of 8,023 (Powys County Council, 2003) and a range of facilities including primary and secondary schools, a hospital and a leisure centre. The town has opportunities for all types and sizes of business enterprises with three existing business parks and a real locational advantage which is its relative close proximity to the motorway network (Ystradgynlais is 20 minutes driving time from the centre of Swansea and 15 minutes from the M4 motorway). It has real potential for operating in a rural environment with highly-developed amenities which include golf, sailing, fishing, pony-trekking and country pursuits. However, in the twenty-first century it remains economically disadvantaged by dint of geography, politics and a defunct industrial past. These factors have conspired to seriously affect the socio-economic structure of the region.

The main problem for the town is based on the region’s development over time from an agrarian economy at the turn of the eighteenth-century, to an industrialised one in the twentieth-century due to the increased demand for high quality Welsh coal in the Industrial Revolution (Lloyd 2001:5). As a direct result, Ystradgynlais prospered and developed wealth, but it was relatively short-lived as geological issues sharply
increased the cost of production making continued mining activity unviable so that by the late 1980s the fortunes of the town had rapidly declined. The outcome of this process was that the region moved in one decade from a robust and prosperous economy dependent on mining and heavy industry, to a diversified manufacturing industrial base reliant on low-cost, low-skilled jobs (Lloyd 2001:6).

Unfortunately for Ystradgynlais even this diversification was short-lived as many of the light manufacturing companies subsequently closed, having proved short-lived in the face of competitive global markets. The net-result is that the town is left at the turn of the twenty-first century with a largely un-skilled workforce and prospects of continued high levels of unemployment. Within a five mile radius of the town there are several tourist attractions which it could capitalise on for example: Craig-y-Nos Castle, a former home of the International diva, Mme Adelina Patti, which is now a thriving hotel and theatre, opposite the castle are the Dan-Yr-Ogof, National Show-Caves Centre for Wales and in the same location there are three pony trekking centres and two outdoor activity centres. In addition during 1999 the French company Danone set up a water bottling plant (five miles from Ystradgynlais), drawing and bottling water at source. Another substantial supportive measure to the town is the Coleg Powys Further Education College site in the town centre where health/spa tourism training has been available in the town since 2001 (the main sites for this specialised training in Powys are based in Llandrindod Wells, Brecon and Newtown).

Ystradgynlais has been identified by the EU as a town in need of economic regeneration (Mid Wales Economic Overview 2002:5), its problem, as previously referred to resides in the fact that it is outside the more favoured EU region status of West Wales and the Valleys. However, the EU Structural Funding in Powys has developed a variety of programmes with primary aims to promote economic and social
cohesion to regions whose traditional industries have declined in significance as generators of employment and wealth in areas such as Ystradgynlais.

2.5 EU STRUCTURAL FUNDING AND REGENERATION PROJECTS

Incomes in Wales, measured by GDP, are considerably lower than elsewhere in the UK and the Welsh GDP is only 80% of the UK average (Welsh Assembly Government, 2002:5). There are important differences in the way in which the Welsh economy has developed from the rest of the UK. Andrew Davies (Enterprise, Innovation and Networks Minister Wales 2000-2006) intimated at the launch of a new technology centre in Swansea (2000) that Wales has had a greater share of manufacturing industry relative to national trends and a smaller share of higher ‘value added’ private sector service industries, such as finance and business services.

The effect of the different occupational mix shows that the Welsh labour force is currently made up of a lower than average proportion of professional and managerial occupations and a higher proportion of unskilled workers. This situation is exacerbated in Ystradgynlais and South Powys where the effect of substantial decline in traditional industries, ageing industrial structures and subsequent high levels of unemployment combine to seemingly limit the long-term potential of the region. This background has meant that Powys and West Wales and the Valleys have been eligible for economic assistance from the EU under its regional development programme.

There have been successive programmes through the EU adjusted over time as regions have “caught up” with the industrial average across the EC. The latest and current programme for Wales is that of “convergence” which follows on from Objective 1 and “competitiveness” which is the successor to Objective 2. The convergence
programme resulted from a rethink in Brussels on the eligible areas for the highest level of intervention throughout the EU and, in the UK, only two areas of the former 7 Objective 1 areas sustained this status, one being West Wales and the Valleys. It is a two edged sword, the continued support is welcome to facilitate economic revival, but the fact that the support has to be continued into a new round of funding suggest that the area is not responding to stimulus already given.

The terms of the new funding round are based on the previous rounds and to give an historical perspective it is worth rehearsing the context. There are four EU structural funds for regions designated an ‘objective’ status NAW (1998:12). These are:

- European Regional Development Fund (ERDF)
- European Social Fund (ESF)
- European Agriculture Guidance and Guarantee Fund (EAGGF)
- Financial Instrument for Fisheries Guidance (FIFG)

In order to manage EU funding in Wales, the European Affairs Division of the National Assembly of Wales Government (NAW) which is now known as WAG, created a Welsh European Funding Office (WEFO) in 1998 this office is responsible for administering all aspects of the EU structural fund programmes in Wales. The whole of the county of Powys was eligible for European funding (the funding ended in 2006) of various kinds and was intended to have the following objectives:

**OBJECTIVE 1** funding gave assistance to the most deprived areas of Europe, Wales Objective 1 areas included *West Wales and the Valleys* and incorporated the towns of Neath and Port Talbot and the City of Swansea all of which border onto Ystradgynlais. ‘West Wales and the Valleys’ was designated an Objective 1 region from January 2000. The area qualified for this status as its gross domestic product (GDP), (a measure of economic wealth) was below 75% of the European average, and the region
qualifies for the funding for seven years 2000-2006. Ostensibly the funds are to enable these areas of Wales to “catch up” with the rest of Europe. Ystradgynlais falls outside this by being placed in the political and therefore less beneficial EU objective 2 funding region of Powys, (Figure 2.1 Map Showing Location of Powys in Wales). As indicated above, that Objective 1 status has now moved on with the West Wales and the Valleys region now accorded the highest level of support (£1.4 billion) (Convergence) from the EU for the new ESF programming round 2007-2013. Convergence will cover 15 local authority areas in the West Wales and the Valleys region (see Figure 2.3 Local Authority Convergence Boundaries) of the Objective 1 programme.
The following describes the remaining Objective 2 and 3 statuses.

**OBJECTIVE 2** – status, which was the status awarded to Powys, gives assistance to areas facing industrial decline, rural areas and urban areas, this includes the town of Ystradgynlais.

**OBJECTIVE 3** – status gives assistance to education and training and employment which is available throughout the EU, (except areas which are covered by Objective 1 funding). The difference between the support levels of the two programmes of Objective 1 status and the Objective 2 status has diminished the opportunities for regeneration through more “traditional” methods at Ystradgynlais as they have been implemented in similar settlements elsewhere.

As part of the effort to provide direction and purpose to the economy of Wales WAG produced a document known as: Wales: A Vibrant Economy, (WAVE) (2005). WAVE is the WAG vision and strategic framework for economic development for creating a vibrant Welsh economy. The recent publication of the Wales Transport Strategy and the Department for Enterprise, Innovation & Networks (DEIN) Business Plan 2006-07 are key documents in this process. DEIN’s Business Plan has been structured around the key WAVE objectives of: enterprise, innovation and improved networks as highlighted below:

- **ENTERPRISE** - the aim is: to increase employment still further; so that over time the Welsh employment rate matches the UK average; even as the UK employment rate itself rises.

- **INNOVATION** - the aim is: to raise the quality of jobs; so that average earnings increase and close the gap with the UK average. Underpinning these priorities are actions to improve:
• **NETWORKS** – the aim is to increase investment in communities, transport, energy, infrastructure networks and other drivers to stimulate strong and sustainable economic growth.  

(Welsh Assembly Government 2005b:3)

Whilst the opportunity to bid for EU structural funding under its Objective 2 area status of Powys will not give Ystradgynlais the advantages of its close industrial neighbours under Objective 1, the town may have an opportunity to benefit from funding which could halt and reverse its decline with new EU structural funding 2007-2013 which is known as Competitiveness and Convergence funding. Importantly it is recognised that any long-term benefit thus derived from Competitiveness and Convergence funding will require the area to up-skill its workforce. The WAG in its vision for Wales set out in the National Economic Development Strategy states:

> to achieve a prosperous Welsh economy that is dynamic, inclusive and sustainable, it must be based on successful, innovative businesses with highly skilled, well-motivated workforce.  

(Welsh Assembly Government 2002a:3)

This is not the case in Powys where the only large employers in the region are in the public sector. The main employment sectors in the county are:

- Agriculture 11%
- Manufacturing 14%
- Retail/Wholesale 16%
- Public Sector (mainly education, health and social care) 26%

Of these, agriculture and manufacturing show a continuing decline, while much of the business is tourism related. (Mid Wales Partnership 2002:12).

The *Winning Wales* (WAG 2002:2) document is the WAG’s strategy for transforming the economy of Wales promotes sustainable development, the vision illustrates strongly that there must be recognition of the interdependence between the economy,
life-long learning, communities, the environment and other policy areas, such as health and transport, and goes on to say:

Our society, the strength of our economy and the quality of our environment are inseparable. Economic growth is not sustainable where the interests of the environment and our established communities are disregarded. Modern businesses want to operate where there is an existing supply of skilled people living in a high-quality environment. The outstanding natural environment of Wales and our comprehensive, higher and further education network are invaluable assets for Welsh business

(Welsh Assembly Government 2002a:2)

South and Mid Powys have that outstanding natural environment they now need to find long term solutions to its current malaise of a steadily-declining economy.

2.6 HEALTH, SOCIAL CARE AND WELL-BEING ISSUES WHICH AFFECT THE POPULATION OF SOUTH AND MID POWYS

The overall state of health, social care and well-being of the population in Powys is shown in the report of needs assessment in Powys included in Health, Social Care and Well-being in Powys (2003: 3) which cites, inter alia:

Underneath this 'rural idyll' there are serious issues not only for health, but for health inequalities and for social care and well-being

Powys County Council, Powys Local Health Board, Powys Association of Voluntary Organisations, Institute of Rural Health, Brecon and Radnor CHC, Montgomery CHC, National Public Health Service (nd)

The report highlights four key factors which affect health, social care and well-being in Powys, first issues such as: EXTREME RURALITY, Powys is described as a region with large mountainous areas a sparse population and agricultural dependency. Second, the report cites the county has a VULNERABLE WORK FORCE who receive low incomes sustain long hours of work which is often seasonal; there is evidence of high self-employment. Third the report shows FRAIL AGRICULTURAL ECONOMY which is highly vulnerable to market forces and catastrophe such as Foot and Mouth
Disease. Finally, the report deals with Powys’ rural and urban deprivation which is mainly **RURAL DEPRIVATION** such as housing deprivation, transport poverty, isolation and low income with pockets of **URBAN DEPRIVATION** such as unemployment and benefits dependency in some Powys towns e.g. Llandrindod Wells. (Powys County Council 2003b:4).

There is an emerging theme that point to a close link between a region’s economic growth and the health of its workforce. In the WHO Annual Report of 2000 (p4) Dr. Gro Harlem Brundtland, Director General of the World Health Organisation (13th May 1998 – July 21st 2003), said that ‘human health and its influence on other aspects of life is central’ and she continued by saying:

> Research has begun to provide clearer evidence of the economic benefits of improving health....economists should never forget the intrinsic value of health, but neither should health professionals forget an important message for presidents and finance ministers: investing in health accelerates economic growth and is one of the very few viable approaches to rolling back poverty.


The Pan-American Health Organisation (1998:3) in *Freeing the Dragon - New Opportunities to Improve the Health of the Welsh Peoples* (Monaghan et al 1999) go further when they counsel that as politicians contemplate future economic policies, they need to bear in mind:

> the relationship between health improvement variables and economic growth is sufficiently significant in the long term to justify sustained national commitment to investing in health

Monaghan et al (1999:7)

It would appear that economic development therefore needs to be placed in the context of social development. In these terms Ystradgynlais was designated a **Communities First** area (2000) under an All-Wales programme sponsored by the Wales Assembly Government (WAG). The programme was designed to help the 100 most deprived wards in Wales and is linked with the production of a Community Strategy which is a
responsibility placed on all local authorities in Wales by the Local Government Act (2000). The Communities First programme in Ystradgynlais has recognised this link in South Powys and, with the support of the Wales Assembly Government (WAG), funding from the Lottery, New Opportunities Fund, PCC and the Communities First Programme a Healthy Living Centre (HLC) has been opened in the heart of the town of Ystradgynlais. The prevailing philosophy for the HLC is that health is more than simply a lack of illness, but more is related to many extraneous issues such as housing, education and income these issues are covered in the Social Inclusion Action Plan 2005 -2008 the Agenda for Powys where its published aims are to:

- Identify those groups and individuals who traditionally remain excluded from the planning and delivery of services
- Develop appropriate and effective processes for identifying and addressing their needs

Powys Local Health Board (2006:2)

The centre is well resourced and links in with courses which are run in conjunction with Coleg Powys there are 89 people enrolled on Beauty and Holistic Therapy courses in the centre (2008).

2.7 HEALTH/SPA TOURISM AND REGENERATION IN MID AND SOUTH POWYS

The WAG report A Winning Wales (2002) echoes the Organisation for Economic Co-operation and Development (OECD) which names four main drivers of economic growth: innovation, enterprise, people and information and communication technology (ICT). The rationales for the drivers are shown as follows: INNOVATION: a proxy measure for innovation is expenditure on research and development. ENTERPRISE: can be measured by the number of people starting up businesses per head of population. PEOPLE: fewer people in Wales have formal academic qualifications than in other regions and those who have high qualifications are attracted out of Wales to
places where there are suitable employment opportunities. **INFORMATION AND COMMUNICATION TECHNOLOGY (ICT):** the current take-up of ICT by Welsh businesses is not high, however, physical infra-structure and access to facilities is patchy and tends to be deficient in the more isolated and less prosperous parts of Wales (Welsh Assembly Government 2004:5) The report's findings conclude that tourism is a key driver of the Mid Wales economy (Welsh Assembly Government 2004:8).

The term *Mid Wales* could however be seen to be unhelpful, it could even be a barrier to maximising exploitation of tourism potential, the county of Powys has towns which border with England North Wales and South Wales as in the case of Ystradgynlais so does Mid Wales have any regional definition? The emergence of the term *Mid Wales* was the responsibility of the former Development Board for Rural Wales (DBRW), prior to its amalgamation into the WDA; previously Wales was termed as either North or South. An argument put forward later by the Welsh Development Agency (WDA) illustrates this point when it cited the main difficulty for the promotion of economic regeneration in Mid Wales was its 'identity'. The WDA suggested that the term Mid Wales may hold little meaning for current residents and for prospective tourists and business suppliers, with the additional complication in that the definition of the economic region of Mid Wales it is not coincident with the administrative geography of Mid Wales.

At the turn of the last century the Mid-Wales Integrated Regional Tourism Strategy (1999-2008) recognised the need for a branding strategy and for image and awareness building and in a report commissioned by the Mid Wales Partnership *A Winning Mid Wales: an Action Plan for Rural Regeneration* (2003:8) said:
Perhaps most significantly there appears to be no clear branding of Mid Wales as a region. Indeed it is not clear whether Mid Wales carries any 'cachet' as a label...outsiders' perceptions may be a large area of inaccessible and largely unpopulated landscape in the 'hole' between England, Snowdonia and the Brecon Beacons.

(School of Business and Management, Aberystwyth University 2003:8).

The report also describes a further challenge and dilemma for Mid-Wales when it says:

Opportunities exist to create for Mid Wales region the same sense of cultural 'buzz' that exists, for example, in Ireland or Brittany. The obvious riposte is that this could be done if it was known how to 'bottle it'. The challenge is to identify the appropriate actions and changes that need to take place to create the conditions under which a year round cultural identity can be created – there may be a need for greater 'joined up' strategic thinking.

(School of Business and Management, Aberystwyth University 2003:12).

In the twenty-first century issues such as cultural identity, rural location, political and economic boundaries and inequalities in health remain key issues for Powys which affects the regions opportunity for economic growth and re-generation in its most depressed areas. There is however, an opportunity to maximise these characteristics as strengths and not weaknesses through the promotion of health tourism. Whilst tourism is identified as a major factor in creating wealth in the region, it does not maximise this great opportunity of exploiting its abundance of natural resources. The way forward could be to develop a strategy of combining the positive features of Powys: unspoilt countryside, a solid hotel infrastructure and health/spa tourism training all under the ubiquitous vehicle of tourism and to incorporate these features through the long history of health in the spas and wells of Powys. This concept presents a major opportunity to develop a USP through a new branded image of health/spa tourism for Powys which would incorporate the historic spas and wells of the region thereby creating a new regional identity.
Jonathan Jones (Chief Executive of the WTB) said:

What we want to see is tourism playing an increasingly important part in developing a rich, mixed economy for Wales

(Wales Tourist Board 2002:15)

This is a positive statement which promotes tourism as a serious driver of economic growth, in truth, whilst tourism relies in the main part in having a product that attracts the tourist; it also relies heavily on an infrastructure of support within its host community. Adequate places to stay and eat are pivotal to the success of the tourism product and that requires a joint understanding in the community of the value of tourism to the health of the local economy. For health/spa tourism to be successfully adopted as a concept for economic development in Powys it is important that the USP's are in focus:

**USP 1**  Ystradgynlais and the Brecon Beacons are recognised as a gateway, from its prosperous industrial neighbours and major M4 road links to a new USP of health/spa tourism in Powys.

**USP2**  Capitalise on the historic spas and wells of Llanwrtyd Wells, Llangammarch Wells, Builth Wells and Llandrindod Wells in Mid-Powys by branding and marketing health/spa tourism in Powys.

**USP3**  Branding health/spa tourism to support regeneration in Mid and South Powys and to raise awareness and redress the issues of health inequalities which are found in the Powys population

**USP4**  Focus on the countryside and mineral waters of the region of Mid and South Powys as a brand and marketable resource in itself

In addition to the natural assets of the county, the communities in Mid and South Powys are able to make use of many already well-established building blocks, such as:

- Established education and training for the indigenous population in tourism, health and fitness therapy and leisure tourism;
- Innovative diversification of traditional farmers markets;
- Increased support for staging major events;
• Strong support for established tourist attractions;
• New ways of exploiting the natural resources of the region;

In order to develop locally-relevant plans, and make the process of developing community plans more manageable, Powys has been divided into 15 local areas for a number of key stakeholders in the wider community who, together, are charged with considering all aspects of life in their region to derive a common plan to provide a long-term shared vision. The main public sector stakeholders in Powys are:

• Welsh Assembly Government.
• Powys County Council
• Visit Wales (The Welsh Assembly Government’s Tourism Team).
• Countryside Council for Wales.
• Welsh Assembly Government’s Department Of Enterprise, Innovation and Networks.
• Business Eye.
• Private Sector (Key Local Enterprises).
• Coleg Powys.

The local stakeholders have already achieved the first step in harnessing the strength of the community to restore its economic prosperity through the ‘Communities First Programme’, which offers resources to develop the community’s ability to take responsibility for making community decisions. It is through this milieu that a major step can be taken in influencing the stakeholders of the community towards the concept of health tourism as a blueprint for growth. They will have the opportunity to recognise that the concept that encapsulates not only new, innovative projects, but is able to show that the branding of health tourism would give both Mid and South Powys a common and distinct identity.

Great wealth was generated through the mining of coal, but it has not been retained in the community similarly, the county’s historic spas have run into disrepair and are now largely redundant. South Powys has good links to walking country in the southern
Brecon Beacons and is rich in geological diversity. The county has all the ingredients to exploit the current preoccupations of the UK government on the nation's health-centred on the need for fitness and wellness which is allied to an emerging, and wider, increasing interest in all things ' holistic'. This is good news for Mid and South Powys; it would seem to have all the elements to exploit a current fashion in tourism: stunning scenery, good access and a friendly community. It could promote good health as its key marketing tool. The question is - how might this be done?

The findings of the WTB at the start of the new Millennium show that Wales' dependence on tourism is 'scarcely matched by any other country in Europe', (Wales Tourist Board 2000:6). Mid Wales and the county of Powys owes much to tourism it is seen by many as a vital force in the Welsh economy as it contributes £2 billion in direct visitor spending and over £5 million a day to the Welsh economy 7% to the GDP of Wales and supports 1 in 10 jobs in Wales, that is 100,000 jobs in over 10,000 businesses (Wales Tourist Board 2003:11). Importantly 50% of that tourism revenue is in rural Wales. WTB published its vision for Wales in a document entitled Achieving Our Potential - A Tourism Strategy for Wales:

A mature, confident and prosperous industry which is making a vital and increasing contribution to the economic, social, cultural and environmental well-being of Wales by achieving sustainable growth through effective co-ordination and collaboration at all levels in the industry

(Wales Tourist Board 2000:12)

WTB has in place a strategy to help the industry deliver dynamic growth:

Given adequate resources for marketing and developing tourism in Wales this strategy suggests that tourism could contribute up to 8% of GDP by 2010

(Wales Tourist Board 2000:101)
This is further evidenced in the National Economic Development Strategy for Wales (NEDS) "A Winning Wales" - the National Economic Development Strategy of the WAG and is intended to address the following key issues:

- **Marketing Wales as a world-class location for business and as a destination for tourism, and to develop new markets for our products** (p:4)
- **And in rural Wales developing income and employment in rural Wales other than agriculture especially for young people** (p:22)
- **Co-operate strategically with our partners to promote the principles of sustainable development in their activities and actively promote the development and implementation of the Wales Spatial Plan** (p:37)
- **Implementing Achieving our Potential – A National Tourism Strategy for Wales which provides a more focussed approach to tourism presenting the culture, heritage and environmental key strengths** (p:39)
- **Work with our partners to enhance the attractiveness of the Welsh country-side and its bio-diversity and celebrate its heritage** (p:37)


In attempting to preserve the environment upon which most tourism thrives, new forms of tourism like health/spa tourism have emerged and best illustrate how to minimise negative tourism impact. health/spa tourism is not a new phenomenon; many countries and cultures have used thermal and mineral waters for health and pleasure purposes for thousands of years but the concept of 'health/spa tourism' is increasingly seen by many rural European regions as providing a basis for generating growth and in particular for rural economies where tourism is regarded as a vital element and that is true for Wales generally and Powys in particular.

The promotion of health/spa tourism is an opportunity to link a number of elements that Powys already enjoys: such as the wide expanse of countryside, clean air, the production and promotion of local organic produce, cosmetic treatments, sport and leisure activities, ecology, complementary medicine and water. Another use of the
water resources of the region are the reservoirs such as at Crai (South Powys) and Elan Valley (Mid Powys) which provide spectacular scenery for visiting tourists. Those same tourists are attracted by the scenery and walking potential of the uplands and the Brecon Beacons which all add up to major attributes in any proposed development of health/spa tourism as a driver of economic development for South and Mid Powys.

2.8 CONCLUSIONS

Powys is a county in Mid Wales which, despite its extensive natural assets, suffers a number of political, economic and geographic anomalies. Extreme rurality, sparse population and agricultural dependency with low income jobs which are often seasonal and low-paid combine to adversely affect health, social care and well-being. Rural and urban deprivation leads to transport poverty, isolation, low income and poor housing. Despite being a rural idyll Powys is crying out for economic generation - high levels of unemployment and the relatively poor health of the indigenous population paint a picture of gloom and doom. The towns of Mid Powys, e.g. Llandrindod Wells, hark back to the glory days of its Victorian past when its spas were a beacon for visitors. In South Powys, most notably in Ystradgynlais, the economic boom following the Industrial Revolution has been succeeded by the demise of heavy manufacturing industry and a legacy of physical scars and high unemployment. Across the county and for different reasons unemployment, social deprivation and a lack of a vision for the future has resulted in despondency and a dependency culture.

Powys needs a strong and purposeful economic vision to help it escape its current malaise. But how will this be achieved? Politically Powys has a history of returning independent or Liberal/Liberal Democrat politicians to Westminster and, more recently, the Senedd in Cardiff Bay who at best have 'walk on' or 'bit' parts in the theatre of
political decision-making and are not well-placed to exert influence on the educational, health or economic development agenda which would promote positive change for Powys. Powys must look to its own resources to establish a firm foundation for its vision for the future and a proposition for more and better-paid jobs which would provide hope for the people of Powys.

So what are the resources which might offer the basis for a better future? The Welsh Assembly Government initially through the Wales Tourist Board and now through VisitWales have identified that Wales has tourism potential that is 'scarcely matched by any other country in Europe' (Wales Tourist Board 2000:6) and Powys - as much as, if not more than any other part of Wales - has the beautiful landscapes, plentiful supplies of water and fresh air which could be used to build a tourism proposition as a focus for economic development. The challenge is to develop an identity that resonates with the past yet offers a viable future for the people of Powys. Ideally the identity would provide opportunities to address not only the employment agenda but also some of the other critical agendas for the people of Powys, most notably the health agenda.

Health/spa tourism might offer the requisite focus and will be explored in detail in this thesis. In Powys, the main ingredients of health/spa tourism are in abundance - therapeutic minerals and springs, large and peaceful expanses of countryside, clean air, moderate climate and outstanding lakes and reservoirs. Health/spa tourism would not only provide the prospect of jobs but also raise awareness of health as a critical issue and provide opportunities for the health of indigenous people to benefit. However, Powys currently lacks a regional identity and there is no clear branding of Mid Wales as a region. To exploit health/spa tourism as a vehicle for economic regeneration requires that these resources are built into a coherent and cohesive marketing proposition. Chapter Three is a review of the literature.
# Chapter 3

## Review of the Literature

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CHAPTER THREE

REVIEW OF THE LITERATURE

3.0 INTRODUCTION

Chapter three will critically review relevant literature to develop a model for a viable and competitive health/spa tourism destination which might form the basis of a framework for health/spa tourism in Powys. Section 3.1 focuses particularly on the work of Ritchie and Crouch (2003) and their model of a competitive tourism destination. Section 3.2 defines health tourism and the history of spas. Section 3.3 distinguishes the concept of health and wellness from the concept of illness through a review of health psychology, the health belief model and issues relating to the placebo effect. Section 3.4 identifies the social and economic benefits of adopting health tourism as a focus for regeneration. In implementing health/spa tourism in Powys there would need to be consensus on the vision amongst stakeholders, section 3.5 discusses stakeholder theory. The chapter culminates in the presentation of a framework for a viable and competitive health/spa tourism destination.

3.1 DEVELOPING A COMPETITIVE TOURISM DESTINATION

The following words are used throughout the literature review – tourism, sustainability and competitiveness. These will each be explained in the following section.
3.1.1 TOURISM
Defining the tourism industry is difficult because it is not grouped under a single heading of the Standard Industrial Classification (SIC) but straddles several different SICs to include: hotels and various other accommodation categories (e.g. self-catering accommodation, youth hostels, holiday parks); restaurants; pubs; bars and nightclubs; events; gambling; travel services; tourist services; visitor attractions; activities. Tourism is not defined by its products but by the purchasers of its products, i.e. the 'tourist' (Bardgett 2000). The internationally-agreed definition of tourism, as cited by Bardgett (2000: 7), is:

Tourism comprises the activities of persons travelling to and staying at places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

Despite its fragmentation, there is widespread consensus that tourism is the world's largest industry and is 'expected to contribute nearly US$6,890 billion to global GDP in 2008 rising to approximately US$10,855 billion over the next ten years' (World Travel and Tourism Council 2008: 5). Locally, regionally and nationally, tourism is being used as 'a ubiquitous vehicle for economic development and diversification and ... an integral element of economic development policy' (Sharpley 2002 cited in Jones and Haven-Tang 2005: 1).

3.1.2 SUSTAINABILITY
The United Nations (UN) Conference on Environment and Development (1992) was informally entitled 'The Earth Summit'. One hundred and seventy-two governments were represented, one hundred and eight by the Head of State. Twenty-four thousand representatives of non-governmental organisations attended with seventeen thousand people attending a parallel forum. The raison d'être of the summit was for world leaders to consider the question 'how can we make a better future?' The conference
resulted in a document known as Agenda 21, which was an action plan for change in the 21st century committing governments to promoting and facilitating sustainable development. Initially this appears as a simple and clear statement of good intent by the people who could make it happen. However, both fundamental and major changes of behaviour and attitudes required a clear long-term commitment to fulfil these aspirations for the future of the planet. The main question for individual countries to debate when their leaders returned was: 'what does sustainability mean?' and 'how can sustainability be achieved?'

In response to the first question the Brundtland Commission (1992) offered the now (in)famous definition of sustainability, i.e.:

Meeting the needs of the present without compromising the ability of future generations to meet their own needs

An answer to the second question is offered by Juha Sipila, (Director of the Helsinki Metropolitan Council), who posited that:

Sustainable development means that we use our unlimited brain capacity instead of our limited natural resources.

Following the Earth summit meeting, across the world local authorities have developed individual, locally-devised, strategies for sustainable development: - Local Agenda 21.

The achievability of sustainability is a moot point although some, notably Wheeler 2006: 3) do not sit on the fence and somewhat pessimistically asserts that, to him:

the new phenomenon, the supposed panacea to all development problems seemed to fall under a category best covered by the old maxim "The bigger the lie, the more people believe it"

Or perhaps more straightforwardly: 'Simple common sense surely screams that sustainability is a completely futile exercise' (Wheeler 1997: 40). Perhaps we can only
strive to do as much as we can and attempt to achieve 'more sustainable' development because quite clearly to do nothing cannot be an acceptable option. It would be an easy option to do nothing on the basis that it would be too difficult, too little and too late.

3.1.3 COMPETITIVENESS

Wherever one is on the sustainability spectrum there can be little debate that: 'Sustaining tourism as a vehicle for economic development in any destination depends on maintaining destination competitiveness' (Jones and Haven-Tang 2005: 1). Quite simply, if a destination is not competitive and visitors do not come then tourism will not work as a vehicle for economic development.

Destination competitiveness is defined by Ritchie and Crouch (2003: 2) as:

the ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future destinations.

Ritchie and Crouch (2003) identify a number of dimensions of competitiveness – economic competitiveness, political competitiveness, social/cultural competitiveness, technological competitiveness and environmental competitiveness.

ECONOMIC COMPETITIVENESS

Harvard University's Michael Porter (1990) identifies four key dimensions of economic competitiveness: factor conditions; demand conditions; related and supporting industries; firm strategy, structure and rivalry, which can help determine which industries a nation should focus on. Porter represents these dimensions in his famous Diamond (see Figure 3.1), as described below.
**FACTOR CONDITIONS:** are the prerequisites for production - labour, land, natural resources, capital and infrastructure. Porter argues that the "key" factors of production (or specialized factors), i.e. skilled labour, capital and infrastructure, are created, not inherited. There are two major issues relating to factors of production: first, they involve heavy, sustained investment; second, they are not easy to duplicate.

**DEMAND CONDITIONS:** these are the key drivers for competitiveness - a sophisticated domestic market demands high quality projects. Geographical proximity to sophisticated consumers ensures enhanced understanding of consumer needs. Porter cites as an example the wine industry in France where sophisticated consumers have demanded high product quality.
RELATED AND SUPPORTING INDUSTRIES: a strong set of related and supporting industries, including suppliers, is important to the competitiveness of firms.

FIRM STRATEGY, STRUCTURE AND RIVALRY:

• STRATEGY: two key aspects of strategy are capital and human resources. The domestic capital market has significant influence on a company's strategy and its expectations of the period for return on investment. Career decisions are based on opportunities and prestige. A country will be competitive in industries where employees hold positions that are considered prestigious. Preferred careers are perceived to be difficult to enter as evidenced through entry qualifications and financial reward – they also tend to have a clear career structure (Haven 2002). While tourism employment may not be highly regarded, the spa industry has a glamorous image and employs a range of employees – professional, technical and operative making spa an attractive focus for tourism development.

• STRUCTURE: a firm must be structured and managed in the best style for that particular industry.

• RIVALRY: healthy competition - the more intense the competition between companies the more they have to compete on product quality and innovation.

Random events can benefit or harm a firm's competitive position, anything - major technological breakthroughs (e.g. the Internet), acts of war and destruction, or dramatic shifts in exchange rates. A competitive domestic spa industry in the UK could take advantage of the negative impacts of the 9/11 terrorist attacks on the World Trade Centre in New York in 2001 and the credit crunch on the travel propensity of UK residents.
POLITICAL COMPETITIVENESS

As Ritchie and Crouch (2003: 4) assert: ‘the political strength and stability of a destination is critical to its tourism competitiveness’. The troubles in Kenya in January 2008 following the elections and the concomitant impacts on the tourism industry are a stark reminder of the importance of political stability to tourism.

SOCIO-CULTURAL COMPETITIVENESS

Residents are key stakeholders in destinations alongside tourism businesses and visitors in tourism development (see Figure 3.2) and meeting their social needs to achieve community benefits without conflict are key elements in the EU Integrated Quality Management methodology (European Commission 2000). The European Commission defines IQM as:

...an approach to managing a tourism destination which focuses on an ongoing process of improving visitor satisfaction, while seeking to improve the local economy, the environment and the quality of life of the local community.

TECHNOLOGICAL COMPETITIVENESS

Technology has become a key enabling factor in tourism development. The Internet, for example, is probably the technological development with the most significant impact on tourism and its importance to both tourists and tourism businesses in the developed world and the developing world cannot be ignored (Karanasios and Burgess 2008).

ENVIRONMENTAL COMPETITIVENESS

Environmental quality is a major issue for tourism development. Aspects of environmental competitiveness include: signage (too much or too little), poor waste management practices and destruction of wildlife habitats. Specific issues relating to environmental competitiveness depend on the nature of tourism in a particular destination. Environmental quality (particularly air pollution) was, for example, a point
of controversy in the 2008 Olympics. Costa Rica has identified itself as an ecotourism destination based on its high quality environment and its biodiversity. Similarly, Kenya and other safari destinations rely on wildlife habitats to maintain biodiversity – any threat to the environment in Kenya is a threat to the sustainability of their tourism.

![Diagram](https://via.placeholder.com/150)

**Figure 3.2: The Iqm Process (Adapted From European Commission, 2000)**

### 3.1.4 THE ROLE OF THE GOVERNMENT

Porter (1990: 30) asserts that government’s proper role is as ‘a catalyst and challenger... to encourage ... companies to raise their aspirations and move to higher levels of competitive performance’. He identifies five ways in which governments can intervene to influence a nation’s competitive position, i.e. through:

- direct or indirect subsidies to firms;
- favourable tax codes;
- educational policies to develop appropriate skills in the labour market;
- a focus on specialized factor creation;
- enforcing tough standards.
The public sector is critical to tourism development in developing countries when the private sector is evolving. In developed countries, such as the UK, interventions from the public sector in tourism development generally take a more 'hands off' approach. Typically public-sector interventions focus on: tourism superstructure development and product quality; marketing; human resource development. Jones and Haven-Tang (2005: 1) provide a simple schematic showing the role of public-sector interventions in support of the tourism industry (see Figure 3.3). They suggest that such interventions may operate at a destination level (through destination leadership and management), a business level (through business support) or an employee level (through training interventions).

![Figure 3.3: Modelling The Role Of Smes In Service Quality And Destination Competitiveness](image)

In their book 'The Competitive Destination' Ritchie and Crouch (2003) offer a more complex model of a destination and the factors that ensure competitiveness (see Figure 3.4). They explain how a destination can transform its comparative advantage into competitive advantage. They identify 'Core resources and attractors' as the
basis for tourism development, including: physiography and climate; culture and history; special events. As will be seen in Chapters 5, 6 and 7 traditional spa destinations are located in particular physiographies that provide the mineral waters that were the defining characteristic of spas. In the Ritchie and Crouch model core resources are supported by ‘Supporting factors and resources’ – infrastructure, accessibility; facilitating resources; hospitality (accommodation and food and beverage provision); enterprises; political will. Above core resources they identify ‘Destination management’ critically including organisation, finance and venture capital, marketing and human resource development. Above that again they place ‘Destination policy, planning and development’ – particularly in relation to destination positioning and branding. Finally they identify ‘Qualifying and amplifying determinants’ – location, safety/security, cost/value, interdependencies, awareness/image and carrying capacity.

Obviously at the heart of a spa tourism destination has to be the spa – whether a traditional spa or its modern equivalent. Many of the other aspects of a spa destination, e.g. management, policy, planning and development, the need for a mix of activities, are not unique to spa but are shared with other destination types. However, image needs special consideration as does human resource development, branding and marketing, the nature of special events to reinforce the health/spa image. Specifically for spas the nature of enterprise might also be different with a range of different supply chain requirements. These specific requirements of a spa destination that will be considered in this thesis will be drawn together in a framework for a competitive health/spa tourism destination at the end of this chapter (see Figure 3.6).
3.2 DEFINING HEALTH TOURISM

Come back; come back, 'tis Nature bids you come. Come back once more to tarn and tangled wood. Come back to glen and steam and torrent flood; Come back and mid the woodlands make your home

(Waddington cited in de Fries 1990: 2)

Seeking a definition of health tourism is not straightforward - there are several types of tourism which can be recognised as health tourism, for example:

\[
\text{the sum of all the relationships and phenomena resulting from a change of location and residence by people in order to promote, stabilize and, as appropriate, restore physical, mental and social well-being while using health services and for whom the place where they are staying is neither their principal nor permanent place of residence or work}
\]

(Kaspar 1990: 54)
The critical words here are 'using health services' to restore good health from a position of illness, or lack of wellness. There is another view of health tourism from the English Tourism Council (ETC) which is the strategic body for tourism in England set up to help businesses increase their competitiveness by identifying and researching new market opportunities. The ETC published a Health Benefits Fact File (2002) which looked at the market opportunities for health tourism in England and defines health tourism as follows:

*Health tourism encompasses those products and services that are designed to promote and enable their customers to improve and maintain their health through a combination of leisure, recreational and educational activities in a location removed from the distractions of work and home.*

(English Tourism Council 2002: 30)

This definition advances the idea that health tourism enables people to improve their health whilst spending time away from their normal environment but does not mention 'using health services' in a way that implies that the concept of health tourism is to enable recovery from illness. In fact the ETC concludes that:

*Health means different things to different people in relation to taking a break. For a few, it becomes a priority only when threatened by illness, with a break taken to convalesce and recover health. For many others it incorporates an idea of fitness and self-improvement. A health break may be seen as an opportunity to re-energise, a sporting activity, an indulgent relaxation, or simply a way to escape or explore alternative ways to achieve a sense of well-being.*

(English Tourism Council 2002: 2)

The views of writers, such as Kasper (1990), contradict these findings and suggest that health and tourism should be considered as separate entities. Consequently HEALTH is defined as a state of wellness and fitness as opposed to the state of illness and sickness; and TOURISM is defined as a sector which provides services and facilities for individuals who leave their place of residence for more than 24 hours and less than one year with the motive of enjoying leisure, travel, peace and relaxation.
When considering these fundamental elements, the concept of health tourism could lead to a description of a sector which provides services and facilities for individuals away from their place of residence with the motive of achieving wellness through leisure, travel, peace and relaxation (Kasper 1990). Other writers endorse this view and suggest that the badge of health tourism is widely used to promote medical health care facilities by:

Attempting on the part of a tourist facility or destination to attract tourists by deliberately promoting its health care services and facilities in addition to its regular tourist amenities, since the accent is on 'deliberate promotion' and that strictly speaking, health tourism is a phenomenon of the 1980s.

(Goodrich 1994: 228 cited in Dann 1996: 211)

Goodrich's research was based on an analysis of 250 Caribbean tourism brochures and interviews carried out with personnel at national tourist offices and travel agents. Goodrich found that only seven resorts in the region specifically advertised their health facilities to tourists and that most of the tourism professionals interviewed had not heard of the term 'health (care) tourism'.

However, some writers totally disagree that health tourism is the promotion of wellness, fitness and leisure activities but rather that the core activity of health tourism refers to the treatment and curing of diseases in traditional spas through the use of mineral water (Crebbin Bailey et al. 2005). Thus, seeking a definition of health tourism is not straightforward and there are various interpretations of the term. Should health and tourism be considered as separate entities as suggested by Kasper (1990) or Crebbin Bailey et al. (2005). There is in fact a further confusing element: health tourism is often referred to in the context of 'spa' or spa therapy. Whether this is a conscious decision or not is not clear. Goodrich (1994:228-30) posits that contemporary health tourism had 'rich historical precedents' and he is right. However historical precedent has placed spas and spa towns at the centre of the tourism destination.
3.2.1 A SHORT HISTORY OF SPAS AND SPA RESORTS

Historically, most spas have been built around inland towns where the natural mineral springs are utilised for beneficial and therapeutic purposes. The first known use of the word spa was by the Romans (50-100AD) as an abbreviation of the Latin ‘Salus Par Aqua’ meaning ‘health through water’ (Leavy et al. 2003: 2). The writer Ralph Jackson, in his monograph Waters and Spas in the Classical World (Porter, 1990: 10), describes the Romans as calling their major spas ‘aquae’ (of which one hundred are known – as in Bath Spa). This is in contrast to the spa in Llandrindod Wells in Powys which the Romans named ‘Balnes’ or ‘baths’. Crebbin-Bailey et al. (2005) points out that while the Romans went on to build spas all over Europe, the Shorter Oxford English Dictionary on Historic Principles (1973) put the usage of the term ‘spa’, not only much later in 1662, but also with a meaning of a medicinal well. It was not until 1777 that it refers to a place or resort with a mineral spring. By the 18th Century spas had become the most fashionable resorts in Europe and the name has been used since that time to mean a place with natural therapeutic mineral springs or wells. In the 21st century the word ‘spa’ is used in addition to describe complexes where mud, sea or freshwater are prescribed to provide good health. When no spring water exists, the complexes are still known as spas and offer treatments to enable people to relax, de-toxify and enjoy beauty, sport and holistic therapy treatments within tranquil surroundings (Leavy et al. 2003:2).

Health tourism and spas are of historic and topical interest. Writers, such as Leavy et al (2003: 3), describe different perspectives on health tourism through time, referring to Europeans who have for centuries been ‘taking the waters because of their curative elements’ and today in the twenty-first century how modern physicians still prescribe ‘the cure’ in major European countries, such as France, Germany, and Italy. These
treatments are respectively called 'cure' (in France) or 'kur' (in Germany) and are prescribed for the relief of a range of ailments, including: rheumatism, arthritis, infertility, eye soreness and skin irritations. There are stringent regulations surrounding the taking of the waters which may only be prescribed following a consultation by a fully-qualified medical doctor who, having diagnosed the ailment, refers the patient to an appropriate 'cure' centre (thermal spa resort) which has the appropriate medicinal mineral water. The centres act as an official medical facility where the cure centre is the spa resort and the patients who are referred to the spa are known as 'curistes' (Leavy et al. 2003: 5).

European spa towns have many social amenities to entertain the curistes as medically prescribed cures usually extend from two to three weeks. It is on this European model that many UK spas were built, e.g. the Roman Spa in the City of Bath and the Rock Park Spa in Llandrindod Wells, Mid Wales. Until quite recently, government health insurance across Europe covered not only the medical examinations and treatments but also lodgings and meals for two-to-three-weeks stays at the spa cure centres. Leavy et al (2003:4) makes the comment, 'How is that for a paid vacation? and without using any vacation time or sick leave!' France is an example of a country where this practice continues today (2008) and all medical treatments including spa treatments are prescribed by doctors on a quasi-medical and social concept and are largely subsidised by the French sociale securite. This funding came about in 1930 when a law was passed which granted social insurance for all citizens of France (Lee 2004). The French system is echoed in most European countries, including Portugal, Germany and Italy (Crebbin Bailey et al. 2004).

Writers such as Kaspar (1990) and the ETC (2001) do not view spas and health tourism as a cure for sickness but rather an attractive healthy holiday designed to
improve personal all-round fitness and well-being, through a variety of perceived healthy activities. The problem however with this concept is that in France, for example, the image of spa and health tourism is of sick and elderly people passing the time of day whilst waiting for treatments or cures. Much has been written in the past of spa cure treatments which have been likened more to torture than anything to do with pleasure. Such treatments were described by Alfred Lord Tennyson who, following spa therapy, was, as he put it, ‘half cured, half destroyed’ (Crebbin Bailey, 2003:18). So the term health tourism is confusing as it can mean many things to different people.

The confusion doesn’t end there. What of the word spa? In Europe spas can be described as: thermal spas, therme, terme, thermal resort, spa resort, thalassotherapy centre, thalassotherapy resort. In addition spa treatments can be described as: the cure, thermal cures, spa therapy, thalassotherapy cure, thalassotherapy treatments and thalassoleisure activities in thalassotherapy resorts. It is therefore understandable that there is confusion over the term ‘spa’ and what it means Does it mean treating illness in which the patient feels ‘half cured, half destroyed’? Is it a place where people have a free holiday at the states’ expense? Are they places of health re-education to aid recovery from illness? Or does the term imply a place to seek relaxation and enjoy pampering in luxury? Perhaps it is this confusion and lack of definition of what spa means that brings confusion to the term health tourism? That is to say, do people go on holiday (i.e. become a tourist) to be cured from illness? Or alternately do people go on holiday to seek wellness and relaxation? For example, the French traditional spa is a destination associated with illness whereas in the UK it is associated with rest relaxation, beauty treatments and luxury. In seeking a clear definition of the term health tourism it is helpful to look at the various cultural and regional interpretations of spas and the role and purpose of the treatments used in these spas.
3.2.2 MODELS OF HEALTH/SPA TOURISM

There are three examples of health tourism which can be identified as spa models: The first is the British spa model which like the European model was originally based on an illness and thermal cure (or spa therapy) model but now has a distinct identification with beauty, wellness and holistic therapy treatments. Second, is the European spa model which is based on illness and thermal cure (or spa therapy). Third is the medical spa model which involves a tourist undergoing prescribed surgery during their stay. The following gives a brief description of these spa models.

BRITISH SPA MODEL

Spas and spa treatments were popular in Britain in the late 19th and early part of the 20th century and resulted in the growth of a number of spa towns - England alone boasted around 220 spa towns (English Tourism Council, 2000). Today, in the twenty-first century, only ten remain - Bath, Buxton, Cheltenham, Droitwich, Harrogate, Tunbridge Wells, Leamington, Malvern, Matlock and Woodhall. Of these ten only the Droitwich Brine Bath Complex and Bath Spa are currently operational.

The European Spa Association (ESPA) (1999) showed that during 1997 1.3 million customers visited the spa towns of England and they remain popular as tourist destinations. This alone has encouraged considerable investment in English spas in recent times, including the enormous investment in the spa complex in the City of Bath which opened a new Millennium Spa in the centre of the historic city (see Chapter Six Case Study: Bath Millennium Spa). Another investment in modernising historic spas is found in the town of Buxton which is planning a £15.5 million re-development of its spa centre while other spa centres, such as Harrogate, have improved the town by
redeveloping the redundant spa infrastructure into a successful conference and leisure destination.

From the late 1920s spas in the UK were in decline due to several factors, one of which was the result of the effects of the First World War, another was the preference for holidaying in the newly-built seaside resorts which competed favourably with claims of efficacy made by taking the waters. The decline was accelerated during the 1930s with the depression and the concomitant drastic reduction in disposable income. The final impact came during the 1940s with the introduction of the NHS in 1949 and family medical practices set up by the British Medical Association (BMA), which provided free prescribed conventional medication and hospitalisation for the population. Subsequently the efficacy of water cures has been bought in to question, in part due to fashion and in part due to scepticism of the real medicinal benefits of the waters. As a consequence, in the UK it became unfashionable to use water cures whereas the European spas continued to prescribe curative spa remedies (ESPA 1999 cited in Crebbin-Bailey et al 2005). Like the rest of Europe the UK has a long history of spa but unlike its European neighbours it has largely been forgotten and many UK spas are viewed as simply of historic interest. Today the image of spa in the UK relates not to the old spa towns but rather to the new and glamorous state-of-the-art spa hotels which are marketed as providing beauty and relaxation programmes. An example of this is St. David’s Hotel Spa, Cardiff which is a typical UK spa offering treatments based on beauty and holistic therapy treatments, such as Swedish body massage, facial massage and skin care treatments.

*People frequent spas for many different reasons, some seek spa treatment because scientific medicine has failed to give them the relief they crave, particularly those who are in need of relaxation and treatments for depression*  
(Leavy et al 2003: 5).
Writers, such as Crebbin-Bailey et al. (2003) and Lee (2004), concur with this assertion and agree that the terminology of 'spa' and the treatments carried out therein have come to be synonymous with individual spa hotels offering pampering in luxurious surroundings places devoted to good health and well-being. This is in stark contrast with the enduring European spa model.

**EUROPEAN SPA MODELS**

The European models of spa resorts are associated with cure and illness as found in France where traditional spas operate in the context of cure and spa therapy. The spa resorts of Vichy, La Bourboule and Châtel-Guyon in the Massif Central of France - the Auvergne region are good examples of traditional spa resorts as they offer prescribed curative treatments to people who are unwell.

There are two types of health/spa tourism treatments associated with traditional spa resorts they are thermalism (or spa therapy), and thalassotherapy. Thermalism is a treatment using mineral-rich thermal waters which are usually sourced warm, but can also be found cold or hot. The waters contain individual therapeutic qualities which are classified according to their composition and may include for example, calcium, magnesium or sodium. The efficacy of the thermal waters is short-lived since their physical and chemical equilibrium is quickly negated following contact with the environment. Lee (2004) posits that typically the rural region of the Auvergne uses spa treatments for two specific purposes: First to treat medical conditions for diseases and disorders of the body and second for preventative purposes to enable health education, general recovery and recuperation however the writer does not give any examples of the type of health education available.
Towards the end of the 20th century many of the European spa resorts faced financial difficulties due in part to outdated social security arrangements and in part to a lack of new patients. There is now evidence that some of these spa resorts are extending their product by offering remise-en-forme (getting back into shape). Remise-en-forme is a concept based on promoting wellness rather than treating illness and taking a much more holistic view of health than that associated with the traditional spa treatments, this type of wellness programme is a new development that opens up spas to a wider market through a focus on general lifestyle issues. In some spa resorts these programmes coalesce with the cure programmes (Leavy et al 2005).

This coalescence of traditional cure and remise-en-forme is seen in Vichy is one such example it is a major centre for thermal cure (the illness model) and is increasingly known as a centre for remise-en-forme (the wellness model). There may be more expeditious reasons for moving towards the wellness model as the city attempts to address the economic repercussions emanating from the negative reputation acquired as a result of the wartime collaborationist government which had its headquarters there during the World War II occupation of France (see Chapter 5.0 section 5.3 Vichy; Case Study: Spa Regions of France--The Auvergne and Saint Malo).

There is a different type of traditional therapy which has diversified from the illness model to the wellness model and is found in Saint Malo on the Brittany coast. The region has a long tradition of thalassotherapy illness cure model which is also known as marine water therapy treatment. The word 'thalassotherapy' originated from the Greek 'thalassa' meaning sea and was introduced by Dr. de la Boardhire in 1867. Thalassotherapy exploits three fundamental benefits: marine water (rich in iodine and is essential for thyroid function); healthy sea air (full of negative ions encouraging efficient cellular activity); sea-weed (rich in minerals and amino acids and processed for
Ingestion or application to various body parts). Thalassotherapy is considered effective for joint, respiratory and skin conditions.

The basic principle of thalassotherapy is that exposure to sea air and repeated immersions in warm sea-water, combined with mud, clay, protein rich algae and microorganisms, such as plankton or sand, help to restore the body's natural chemical balance. The treatments are based on the uses of the combined properties of sea-water, marine air and climate in order to treat various ailments whilst using a variety of techniques. Not unnaturally, the treatment demands a site which is located by the sea in order to collect fresh unpolluted sea water. Although the treatments used in both thermalism and thalassotherapy vary from region as the treatments vary according to the properties found in the waters, Crebbin-Bailey et al. (2005) identify some common treatments for both types of therapy, including:

- Hydrotherapy treatments;
- Bath treatments;
- Showers treatments (of which there are seven types);
- Steam treatments;
- Pool-related treatments;
- Vapouriums;
- Fango therapy (or thermal mud therapy) and mud packs;
- Massage and thermal gas treatments.

In France there are two types of thalassotherapy centres - those which offer physiotherapy treatments and those that do not. The thalassotherapy centres offering physiotherapy treatments are sent patients whose treatments are prescribed by doctors with part funding by the French sociale sécurité. Today many of the treatments in the French coastal resorts have moved from the illness model to the wellness model. Saint Malo now offers remise-en-forme thalassotherapy treatments and a wide range of thalassoleisure activities. Thalassoleisure is a concept based on leisure activities including fitness, wellness and fun in a sea-water environment. It was pioneered in the early 1800s when Duchess de Berry started the fashion for sea-bathing in Dieppe and
is primarily designed as a holiday rather than a serious treatment for a specific condition. The following looks at a more modern interpretation of spas which concerns destinations that actively encourage tourists to come for surgery or other medical treatments.

MEDICAL SPA MODEL

The medical spa model promotes tourism by welcoming foreigners who are seeking medical treatment and advertise radical medical surgery under the banner of health tourism. Costa Rica is one such country, statistics from The World Health Report (1995) place Costa Rica third in life expectancy in the world behind Japan and France and ahead of the UK and the USA with a per capita income approximately one tenth that of the other four countries. One of the main factors contributing to this statistic (not withstanding the easy life-style, fresh food and tropical climate) is the Costa Rican government's policy of affordable access to a first-class health care system with diagnosis and medical treatment which it has now extended to foreigners for appropriate financial consideration. This strategy considerably alters Costa Rica's profile of foreign exchange earnings. At this time (2008) the UK government has no plans to emulate this form of extended Health Service by offering medical procedures, either by surgery or other treatments on a holiday basis to foreigners.

The UK has seen the 'emergence of swimming pools in the 1960's, tennis courts in the 1970's, golf course and health clubs in the 1980's and spas in the 1990s' (Leavy et al. 2003:17) of these facilities only the spa has evolved and adjusted to cater for an ever-more sophisticated clientele. In the UK spas have come to mean: health farms, day spas and hotel/spa facilities/resorts. Health farms became popular in the 1970s in the UK and were generally located in large country houses in rural settings. 'Champneys' is a good example of this type of provision the company offers a wide range of
treatments such as aromatherapy, reflexology, hydrotherapy, body massage and beauty therapy treatments and has developed its own range of complementary skin care products and merchandise. The more recent emergence of day spas which are available in most UK towns and cities usually provide spa cuisine, a full range of therapeutic treatments: e.g. aromatherapy, reflexology and a variety of massages and counselling services for weight management. Hotel spas in the UK are located within the complex or resort, the facilities and are usually free to guests with membership for other regular users.

In the UK health resorts such as 'Center Parcs' have been specifically developed to provide clients with a variety of opportunities to relax and unwind. In the USA a health resort is defined as one:

where visitors stay overnight and take part in activities intended to improve or maintain their health. The provision of health supporting experience in a pleasant environment is the main objective of the resort and the experience.

(English Tourism Council 2002: 14)

A health resorts can be described as holiday accommodation with a large variety of options for sport and leisure activities e.g. based in one centre in a rural area. The healthy holiday resort will also offer beauty and holistic therapy treatments with opportunities for quiet times in natural surroundings with added entertainment and restaurants for all age groups wishing to socialise. All of the aforementioned spa models are geared to self-improvement for the mind and body through treatments and activities to induce peace and relaxation n tranquil surroundings.
3.3 HEALTH, WELLNESS AND HEALTH PSYCHOLOGY

An apposite definition for the promotion of health tourism through the promotion of wellness suggests that:

Nothing can be more important than a nation's health, and nothing can be more important for a healthy tourism industry than making sure we recognise opportunity and provide services that are of the highest quality throughout.

And that:

health tourism is where these two priorities come together, forging a vital link between holidays, short breaks or day trips and well-being of mind, body and spirit

(English Tourism Council 2002: 4)

In terms of wellness as opposed to illness, it is important first to attempt to understand the psychology of well-being of the mind body and spirit. Writers, such as Engel (1980), Schwartz (1982) and Taylor (1985), agree that the terms health and illness represent interactive states between social, physical, psychological and environmental factors. The critical issue that emerges is that health, therefore, represents not only the absence of disease, but a much wider issue encompassing the whole of a person's well-being, incorporating social, psychological and spiritual dimensions as well as environmental, economic, educational and recreational factors. For health/spa tourism as a concept to be adopted by a region, clearly a definition must first be understood by all stakeholders.

3.3.1 DEFINING HEALTH

The following definition of health as adopted by the WHO International Health Conference in 1946 has not been amended since 1948:
a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity
(World Health Organisation 1999)

Writers, such as Banyard (1996: 728) assert that health is: 'very difficult to achieve' and posits that the WHO definition ignores the wider social, political and economic factors. He posits the definition implies that 'people who are not fulfilled are also not healthy' (Banyard 1996: 728). On the other hand, the definition does suggest complete physical, mental and social well-being and emphasizes the holistic approach to health involving physical and mental states as well as body and spirit. The holistic ethos of health which links health, health psychology, and policy is helpfully illustrated by Matarazzo (1980) who defines health psychology as:

the aggregate of the specific educational, scientific and professional contributions of the discipline of psychology to the promotion and maintenance of health, the prevention and treatment of illness, the identification of etiologic and diagnostic correlates of health, illness and related dysfunction, and the analysis and improvement of the health care system and health policy formation.
(Matarazzo 1980: 809)

This definition takes the link full circle and suggests that the improvement of health is directly related to a country's adopted health care system and health policy formation.

3.3.2 STRESS AND HEALTH IN THE TWENTY-FIRST CENTURY

One of the distinguishing features of life in the twenty-first century is the pace at which people live their lives which often results in stress. Much has been written and reported on stress and the negative effects of stress. The UK Health and Safety Executive (HSE) estimated that five million workers in the UK believe that they are exposed to work stress and defines work-related stress as:

Difficulty, strain or worry coping with tasks, responsibilities or other types of pressures connected with a job, because of excessive demands or pressures
Statistics reveal that the number of working days lost in Great Britain due to work-related injury and ill health fell from 40 million in 2000/02 to 30 million working days in 2005/06. These figures show some progress against targets set to improve national health and safety performance by 2010, ill health accounted for around 24 million working days lost. The most common causes of absence from work were found to due to stress and musculoskeletal disorders which made up around three quarters of this figure (Health and Safety Commission: 2006).

Pain is the chief symptom of most musculoskeletal disorders and can be caused by damage to the skeletal system. The National Centre for Complementary and Alternative Medicine which treats pain through mind-and body focuses on the interactions among the brain, mind, body, and behavior, and on the powerful ways in which emotional, mental, social, spiritual, and behavioral factors can directly affect health. It regards as fundamental an approach that respects and enhances each person’s capacity for self-knowledge and self-care, and emphasizes techniques that are grounded in this approach (NCCAM, National Institutes of Health 2007).

The ETC found that people in these circumstances often use holidays to: recuperate from illness, improve their health, and to increase their feeling of wellness through discovering and learning about new activities that will help alleviate stress and improve their day-to-day lifestyles. Interestingly the ETC (2002) also found that in the holiday context, health is consciously disassociated from illness, and importantly negative associations of health are de-motivating and that when on holiday consumers will edit them out. Where stress relief was an obvious holiday benefit it can only be sold as such to those specifically looking for it as part of their health or stress management.
regime (ETC, 2002). The ETC research found that most people’s view of health falls into two broad categories - physical and psychological - with psychological health being considered a by-product and benefit of physical fitness.

For centuries philosophers have argued over the concept of the mind, although most agree that stress-related illness is regarded as a condition of the mind. Crebbin-Bailey *et al.* (1994) assert that most recently neurophysiologists and neuropharmacologists have joined in the debate defining the mind as the functions in an individual person which deals with feelings, perception, thoughts, willpower and reason. There are many reviews of the specific concepts associated with stress (e.g. Cohen *et al* 1991), it's positive and negative effects (Watson, 2000), happiness, (Argyle, 2001) and depression (Basco, Krebaum and Rush 1997). However, Diener (2002) posits that the interrelationships between these concepts have not been systematically explored in depth to determine which concepts are essential to well-being.

### 3.3.3 HEALTH AND HEALTH PSYCHOLOGY

Whilst the recognition of health psychology is comparatively recent, the ideas and basic concepts have been evident in and around psychology for some time. Freud is credited with much of the development of the study of psychosomatic disorders. Writers of psychology texts, such as Dunbar (1943), Ruesch (1948) and Alexander (1950), have emphasised the relationship of particular diseases to personality types with an implicit causation hypothesis that led to health psychology being seen as a challenge to the mind-body split this suggests a role for the mind in both the cause and the treatment of illness which is the result of a multitude of factors and not by a single causal factor.
Philosophers throughout history have shown that they are uncertain whether the idea that the mind and body are part of the same system or are indeed two separate systems. There has been evidence of this dual interpretation since the Stone Age when skulls from this time were found with small holes in them (a recognized cranial procedure, known as 'trephination'). The holes were made intentionally during consciousness to allow evil spirits to leave the body while a shaman (physician) performed treatments and rituals (Kaplan 1975:80). Hippocrates (377BC) was among the first in the earlier civilizations to identify the role of body functioning in health and illness rather than crediting illness to the work of evil spirits. This view of a 'humoral theory' of illness was later expanded by Galen (129 AD) and according to this stance, disease arose when the four circulating fluids of the body: blood, black bile, yellow bile and phlegm were out of balance. The function of the treatment was aimed to restore balance among those humors. The 'humoral' approach was sidelined by a 'theory of cellular pathology' which maintained that all disease is 'of the cell rather than a matter of fluid imbalance' (Kaplan 1975 cited Taylor 1995:46). This discovery was largely made through the work in microscopy of Anton van Leeuwenhoek's (1632-1723) and Giovanni Morgagni's (1682-1771) contribution to autopsy.

The treatment of illness through medicine during the 16th and 17th century continued to seek progress through the medical laboratory and through bodily factors. This was in contrast to the approach of the mysticism and demonology which dominated concepts of disease in the Middle Ages where driving out demons resulting from God's punishment for evil-doing by torturing the body, was later replaced by penance through prayer. During this time the Church was, in effect, in control of all medical knowledge. As a consequence medical practice had fundamental religious overtones which were unscientific and inferred generalisations about mind and body relationships.
The functions of the physician were, as a consequence, absorbed by the priest so that 'healing and the practice of religion became indistinguishable' (Kaplan 1975 cited Taylor 1995:36). In order to attempt to move away from the indistinguishable position of healing and religion, the dualistic concept of mind and body was further reinforced by physicians only caring for the body, while on the other hand philosophers and theologians concerned themselves with the workings of the mind. Between the 16th- and 19th centuries physicians concentrated on organic and cellular changes and pathology as the basis for diagnosis and treatment of illnesses. Illnesses at this time were seen as unavoidable - people tended to die of acute (sudden onset) illnesses such as influenza, pneumonia and tuberculosis and this remained the case until the emergence of modern psychology (Engel 1986).

One of the most influential and authoritative thinkers of the 20th century: Sigmund Freud, a physiologist, medical doctor and psychologist as well as the creator of psychoanalysis. He produced viewpoints on what was termed 'conversion hysteria' where he posited that specific unconscious conflicts can produce physical disturbances symbolic of the repressed conflict. An example of this state (albeit biologically impossible) is known as 'glove anaesthesia' in which the hand alone loses sensation in response to highly stressful events. Modern eating disorders, such as anorexia nervosa and bulimia, have also been interpreted as forms of conversion hysteria. This viewpoint, originally advanced by Freud, shows that specific unconscious conflicts can produce physical disturbances which are symbolic of the repressed conflict.

Unlike Freud, psychologist researchers, such as Dunbar (1943), Ruesch (1948) and Alexander (1950), linked patterns of personality, rather than a single specific conflict, to specific illnesses. An example was Alexander's profile of the patient with an ulcer prone personality, whose condition was caused by excessive needs for love and
dependency which repressed emotions. Alexander suggested this increased the secretion of acid into the stomach, eroding the stomach lining and eventually producing ulcers. These researchers argued that conflicts produce anxiety, which in turn embeds in the unconscious psyche and will eventually take a physiological toll on the body producing organic disturbance. It is this viewpoint which effectively shaped the emergence of ‘psychosomatic medicine’, i.e. disorders caused by emotional conflicts - ulcers, essential hypertension and neurodermatitis. Much of the theory of psychosomatic medicine still exists today:

we have in effect come full circle historically in the way we view the mind-body relationship. It is now known and accepted in the twenty-first century that physical health is inextricably linked with the psychological and social environment, this body of learning is known as ‘health psychology’.

(Engel 1986: 94)

Health psychology focuses on understanding the psychological influences on how people stay healthy, why they become ill, and how they respond when they become ill. Maddux et al (1986:30) put this view very succinctly by saying: health psychology is concerned with all psychological aspects of health and illness across the life span. The professional, whose task it is to contextualise these aspects is known as a health psychologist.

3.3.4 THE ROLE OF THE HEALTH PSYCHOLOGIST

The role of the health psychologist is defined by Matarazzo (1980) as a person whose work focuses on:

- Health promotion and maintenance e.g.: promoting exercise and designing media campaigns to improve people’s dietary habits.
- The study of the prevention and treatment of illness e.g.: teaching people in high stress occupations to manage their stress effectively.
• Etiology (the origins or causes of illness and the correlating of health, illness and dysfunction) e.g.: behavioural and social factors such as smoking, excessive alcohol consumption and ways of coping with stress.

• Analysing and attempting to improve the health care system and the formulation of health policy.

Increasingly, health psychologists are employed in the workplace or as consultants advising employers attempting to set up new health care systems (Keita et al. 1990). They consult with government agencies on reducing health care costs, by evaluating the role of disease and illness-related behaviours such as smoking, high cholesterol levels, lack of exercise, high blood pressure, alcohol consumption and stress. The aim is to understand, explain, develop and test theory by predicting unhealthy behaviours.

3.3.5 MODELS OF HEALTH BEHAVIOUR

Some writers suggest that beliefs about health and illness can be used to predict behaviour. Some health psychologists argue that to promote healthy behaviour they should put theory into practice by first understanding the role of behaviour in illness to allow unhealthy behaviours to be targeted and second to understand the beliefs and their impact on behaviour and by targeting the belief to change it and as a result change the behaviour (Ogden 1996). Thus health psychologists emphasise the role of psychological factors in the cause, progression and consequences of health and illness. Kasl and Cobb (1966) have identified three types of health-related behaviours. The first, health behaviour is aimed at preventing disease e.g. by eating a healthy diet. Second is the illness behaviour aimed at people seeking a remedy e.g. by going to a doctor. Third, sick role behaviour is any activity aimed at getting well, e.g. taking prescribed medication and by resting. This model could be used to describe the key difference between a spa wishing to promote health and wellness through remise-enforme and a spa which is simply treating and curing illnesses in traditional spas.
Health behaviours were also defined by Matarazzo (1984) in terms of either health-impairing habits, which he called behavioural pathogens (e.g. smoking), or health-protective behaviours which he termed behavioural immunogens (attending regular health check-ups, regular tooth brushing and the proactive seeking of health information. Matarazzo differentiated behaviours with negative impacts from those with positive impacts. Leventhal et al (1985) described several factors that they believed predicted health behaviours, including: social factors (e.g. learning, reinforcement, modelling and social norms), genetic factors (e.g. a genetic basis for alcohol use), emotional factors (such as anxiety, stress, tension and fear), perceived symptoms (e.g. pain, tension and fear) as well as the beliefs of the patient and the beliefs of the health professionals. Marteau and Johnston (1990:359) rightly argue that it is important to assess health professionals’ beliefs and behaviours alongside those of the patient, since such factors may influence the patient’s uptake. To predict preventative health behaviours and also the behavioural response a ‘health belief’ model was first developed by Rosenstock in 1966.

3.3.6 HEALTH BELIEF MODEL

The model of health behaviour specified by Rosenstock (1966) and later modified by Becker and Maiman (1975) (see Figure 3.5) is used to predict health behaviour before illness (e.g. screening for breast cancer) as well as compliance with treatment once diagnosed. In this way, both the sick role behaviour and preventative behaviours are capable of being predicted and that the likelihood of a person engaging in health-related behaviours is a function of several dimensions.
Chapter 3: Review of the Literature

**Individual Perceptions of Action**

- Perceived susceptibility to disease 'x'
- Perceived seriousness (Severity) of disease 'x'

**Modifying Factors**

- Demographic variables (age, sex, ethnicity etc.)
- Sociopsychological variables (personality, social class, peer and reference group pressure etc.)

**Likelihood of**

- Perceived benefits of action
- Perceived barriers to preventive action

**Cues to Action**

- Mass media campaigns
- Advice from Others
- Reminder postcard
- From physician or dentist
- Illness of family member or friend
- Newspaper or Magazine article

Figure 3.5: Health Belief Model (Becker et al 1975)

### 3.3.7 BIOMEDICAL AND BIOPSYCHOLOGICAL MODELS OF MEDICINE

In the twenty-first century illnesses are mainly chronic (i.e. long-term or will never be cured), such as cancer, heart disease and diabetes, and by their prognosis need to be 'managed'. The biomedical model views physical illness as being linked to a specific pathogen (disease causing organism). Diseases, such as tuberculosis, measles and chicken pox, are dealt with in terms of the biomedical model - chronic diseases need a
broader model in order to explain the contributing factors and possible ways of dealing with such diseases. The biomedical model continues to govern the thinking of most general practitioners (GPs) in the UK as it has for the last 300 years. The model maintains that all illnesses can be explained on the basis of aberrant somatic processes, such as neurophysiologic or biochemical imbalances. Table 3.1 compares and contrasts the bio-medical and bio-psychological models of medicine. In short, the biomedical model assumes that psychological and social processes are largely independent of the disease process. The bio-psychosocial model on the other hand is based on the assumption that any health or illness outcome is a consequence of the interplay of social factors, combined with psychological and biological factors (Ogden 1996). Taylor (1995) asserts that there are several obvious problems with the biomedical model, such as the difficulty the model has in accounting for why a particular set of somatic conditions need not inevitably lead to illness. She asks the question of why, for example, if six people are exposed to measles only three develop the disease. She suggests that there are psychological and social factors which influence the development of illness and further develops the argument that this is largely ignored by and outside of the biomedical model. As a consequence ‘the biomedical model has proven to be scientifically and clinically inadequate in explaining the disease process’ (Engel 1997:130).
<table>
<thead>
<tr>
<th>WHAT CAUSES ILLNESS?</th>
<th>BIOMEDICAL MODEL</th>
<th>HEALTH PSYCHOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diseases which come from outside the body, invade the body and cause physical changes within the body, or originate as internal involuntary physical changes. Such diseases are caused by a number of factors, including chemical imbalances, bacteria, and virus's genetic predisposition.</td>
<td>Human beings are complex systems. Illness is caused by a multitude of factors not a single causal factor. Health not a simple linear model and illness is caused by the combination of biological, psychological and social factors. Reflects bio-psychosocial model of health/illness (Engel 1997; 1980) integrating psychological and environmental factors into traditional biomedical model. Bio factors (genetics, viruses, bacteria and structural defects). Psycho aspects in terms of cognitions (e.g. expectations of health), emotions (e.g. fear of treatment) and behaviours (e.g. smoking, diets, exercise or alcohol consumption). Social aspects expressed as social norms of behaviour (e.g. smoking or not smoking), pressures to change behaviour (peer group expectations, parental pressure, etc), social values on health (e.g. whether health was good or bad), social class and ethnicity.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHO IS RESPONSIBLE FOR ILLNESS?</th>
<th>BIOMEDICAL MODEL</th>
<th>HEALTH PSYCHOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Illness arises from biological changes beyond the patient’s control - individuals are not responsible for illness but are victims of external forces causing internal changes.</td>
<td>Illness is the result of a combination of factors and the individual is no longer seen as a passive victim.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HOW SHOULD THE ILLNESS BE TREATED?</th>
<th>BIOMEDICAL MODEL</th>
<th>HEALTH PSYCHOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Treatment is in terms of vaccination, surgery, chemotherapy and radiotherapy, all of which change the physical side of the body.</td>
<td>Treat the whole person not just the physical changes that have taken place. Encourage changes in beliefs, behaviour change, the development of coping strategies and compliance with medical requests.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHO IS RESPONSIBLE FOR THE TREATMENT?</th>
<th>BIOMEDICAL MODEL</th>
<th>HEALTH PSYCHOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility for treatment rests with the medical profession.</td>
<td>The patient is in part responsible for their treatment, e.g. taking medication, changing beliefs and behaviour. The patient is not a victim.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT IS THE RELATIONSHIP BETWEEN HEALTH AND ILLNESS?</th>
<th>BIOMEDICAL MODEL</th>
<th>HEALTH PSYCHOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and illness are seen as qualitatively different you are either healthy or ill - there is no continuum between the two.</td>
<td>Health and illness exist on a continuum. An individual progresses along continuum from health to illness and back.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT IS THE RELATIONSHIP BETWEEN THE MIND AND THE BODY?</th>
<th>BIOMEDICAL MODEL</th>
<th>HEALTH PSYCHOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mind and body are independent. The mind cannot influence physical matter and is abstract, relating to feelings and thoughts. The body is physical matter - skin, muscles, bones, brain and organs. Changes in body are independent of changes in the mind.</td>
<td>Mind and body considered separate but increasing focus on interaction between mind and body and reflected in the development of a holistic/whole person approach to health.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT IS THE ROLE OF PSYCHOLOGY IN HEALTH AND ILLNESS?</th>
<th>BIOMEDICAL MODEL</th>
<th>HEALTH PSYCHOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Illness may have psychological consequences but not psychological causes. For example, cancer may cause unhappiness but mood is not related to either the onset or progression of the cancer.</td>
<td>Psychological factors are seen as not only possible consequences of illness but as contributing to its aetiology.</td>
<td></td>
</tr>
</tbody>
</table>

Table 3.1: Comparison and Contrast of the Bio-Medical and the Bio-Psychological stance (Ogden 1996)
It becomes clear that the key to understanding the issues of health and wellness is the complex interaction between the individual and their environment – both physical and psychological. The biomedical model seeks to reduce this complexity to a simple formula whereby all illness is explained as a malfunction of the body's biochemistry. However, it fails to accommodate the socio-psychological aspects of an individual's interaction with the environment. Rather a systems understanding is required that can both map and predict the two interactive influences - man and his environment - one that incorporates the social and psychological influences on health and well-being. The issue here is not illness *per se*, but rather the factors that contain and influence well-being. In this context many of the modern day holistic spa therapy treatments have been introduced to promote a feeling of well-being and are designed to alleviate stress. However many spa treatments, such as reflexology and aromatherapy treatments, have not undergone robust research into their overall efficacy and may only have a placebo affect.

### 3.3.8 PLACEBO EFFECT AND HOLISTIC THERAPY TREATMENTS

The term *placebo* is derived from the Latin for 'I Please' and could be interpreted as the wish to give or receive pleasure. The 'placebo effect' is the improvement in the condition of a sick person which cannot be attributed to the specific treatment employed. Crebbin–Bailey *et al* (2005) suggest that psychosomatic illness is stress-related, e.g. indigestion, ulcers and asthma attacks, are subject to power of suggestion, i.e. that there is an interaction between the mind and body which harnesses both the will and subsequent energy to go on to release self-healing capabilities (Crebbin–Bailey *et al*. 2005).
Crebbin-Bailey *et al* (2005) identify four factors critical to improvement, i.e.:

- the environment in which the treatment is received;
- the relationship between the patient and the practitioner;
- the way in which the illness is explained and approached by the therapist;
- healing as a result of the treatment.

Thus the effectiveness of the placebo is dependent on the extent of the belief of the patient so results vary from patient to patient. Crebbin-Bailey *et al* (2005:189) conclude that: 'placebos only seem to work as much as the patient believes they will'. Modern spas would therefore fulfil this given criteria to achieve health and wellness as they are designed to be relaxing places where people can de-stress, where beauty and holistic therapy treatments are practiced in a safe environment by qualified therapists.

### 3.4 SOCIAL AND ECONOMIC BENEFITS OF HEALTH TOURISM

The Ljubljana Charter on Reforming Health Care (1996) emerged from the experience of countries implementing health care reforms in Europe. It was drawn up to articulate a set of principles to improve health care, today it is an integral part of current health care systems. It is centred on the WHO (1996) principle that health care should first and foremost lead to better health and quality of life for people and be driven by values of human dignity, equity, solidarity and professional ethics;

- Targeted on protecting and promoting health;
- Centred on people to allow citizens to influence health services and take responsibility for their own health;
- Focussed on quality, including cost-effectiveness;
- Based on sustainable finances, to allow universal coverage and equitable access;
- Orientated towards primary care.

(World Health Organisation 1996: 10)
Monaghan et al (1999) reflected that The Better Health Better Wales Green Paper (1998) highlights the importance of health in underpinning sustainable development and further that this is absolutely essential if one is to achieve lasting population health gain and reduction in health inequalities. They also praised the follow up Better Health Better Wales Strategic Framework (1998-2000) which was designed to provide a framework to improve health, particularly via those determinants of health other than health-care, and went further to actively endorse the proposal that 'joined up' responses are needed for 'joined up' problems.

Evidence that national economies derive great benefit from good health in the population - enhanced productivity and reduced pressure on health care budgets of this can be seen in various White Papers, for example the Welsh Office (WO) document Better Health Better Wales (May 1998), which describes the legacy of health and inequalities in health status within Wales and between Wales and other countries, and the National Audit Office (NAO) (1996) report Improving Health in Wales which was a response to the WHO's Strategy for Health For All by the Year 2000 (see Chapter 2:16). And so emerges a strong political argument to keep people free from illness by promoting wellness together with the by-product of good health through improved economic growth. Hazell et al (1998 cited Monaghan et al 1999: vii) went further by suggesting that as the WAG contemplated their economic policies for Wales, politicians need to bear this in mind:

3.4.1. ECONOMIC BENEFITS OF HEALTH TOURISM

Change in the economic fortunes of any settlement, together with its potential for economic growth was first created by Rostow (1997) and described in his general theory of settlements and their propensity to develop and decline in a predictable way. He suggests that there have to be the conditions for take off, but once fulfilled the
settlement will inevitably fulfil the other parts of the model and then decline. It is
distorted by unpredictable events, such as war and government changes. The
conditions for any region's economic growth to be even considered sustainable a
fundamental requisite should be an exploitable renewable resource - water is debatably
such a resource. Kofi A. Annan, Secretary General of the UN said at the launch of the
International Decade for Action Water for Life 2005-2015 'water is essential for life'.
Throughout history water has successfully sustained spas and spa resorts through the
deeply-rooted human habits, reaching back as far as pre-historic times, of "taking the
waters". Medical science continues to discover revolutionary techniques to improve
health care and sustain the world's population through orthodox medicine and
improved medical surgery. This has led to many changes in approach as the thinking
of medical scientists has altered. However, the use of water as a treatment and cure
for all manner of ailments (usually from thermal springs) has remained constant for
thousands of years.

The European experience of the spa sector is very lucrative, the global spa market
population is estimated at 160 million and in Europe was valued as being worth £9
billion by the International Spa Association (ISPA) (1998) In the year 2000, ESPA
reported that the UK enjoyed just a 5% share of the 20 million European customers
and 11% of nights. The same report emphasised losses to the UK from British
residents taking around 13.8 million spa trips per year. Since about half of these trips
are to foreign destinations only 17% of the total spend of £8 billion (i.e. £1.4 billion)
stays in the UK. While £1.4 billion might be regarded as a fraction of the total spends,
it would make a significant contribution to the UK's tourism economy. In all a total of
1.2 million customers (or 2.6% of the adult population) take spa breaks, accounting for
7 million trips over 21 million nights (ETC 2002). ETC predict that the health/spa
tourism sector has the potential to double in the following years and estimates the UK's spa growth at 7% per annum and importantly that it is the high spending end of the market who make up the UK health tourism market and spend 6% more per trip than average. ETC concludes that 40% of UK residents are likely to choose England as their destination of choice (ESPA 2000 cited ETC 2002).

3.4.2 LOCATION AND EMPLOYMENT IN THE TOURISM SECTOR IN WALES

Although tourism activity is spread across Wales it is concentrated in North Wales, South-west Wales and South-east Wales with much lower levels of activity in Mid Wales which are reflected in employment statistics of 5% of total Welsh tourism employment (York Consulting Ltd 2000). A 'best estimate' for the number of tourism-related businesses in Wales is 7500 but since 50% of these businesses are outside formal industry structures they are difficult to identify and even if identified they are hard to target and subsequently influence (York Consulting Ltd 2000). York Consulting Ltd (2000) asserts that Mid Wales has an ongoing decline in traditional tourism – a reduction in the number of domestic long (main) holidays and an increase in the number of short breaks (second holidays) which are less lucrative. In response to this businesses need to diversify and such diversification requires enhanced managerial and entrepreneurial skills (Jones and Haven-Tang, 2005). Whilst there has been considerable diversification into tourism by the agricultural industry this is likely to reach saturation point. York Consulting Ltd highlights issues relating to access to training and the number of higher and further education establishments and private training providers in the area. The local labour market is limited and there is poor culture of training in the small tourism businesses in Mid Wales (York Consulting Ltd 2000; Wales Tourist Board 2000). One opportunity for Mid Wales would be to use its natural
resources to build on the key strengths of the Welsh tourism product through a focus on health tourism as a driver for socio-economic development.

3.4.3 A TARGET MARKET FOR HEALTH TOURISM

The USA's definitions of health tourism and a health resort are useful in the context of analysing suitable, viable tourism options for Mid Wales (ETC 2002). Health/spa tourism encompasses those products and services that are designed to promote and enable people to improve and maintain their health through a combination of leisure, recreational and educational activities in a location removed from the distractions of work and home. Health resorts as a place where visitors stay overnight and take part in activities intended to improve or maintain their health, i.e. the provision of a health-supporting experience in a pleasant environment is the main objective of the resort (ETC 2002).

Table 3.2 indicates how the USA health market is a continuum and shows the health/spa tourism product and the identified target market.

MOTIVATION

<table>
<thead>
<tr>
<th>RECOVERY FROM ILLNESS / STRESS</th>
<th>Wellbeing</th>
<th>Fitness</th>
<th>Holistic Complementary Treatments</th>
<th>Pampering: Pure indulgence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MEDICINAL CURATIVE SPA BREAKS FOR STRESSED FAMILIES</th>
<th>Leisure Breaks</th>
<th>Activity Holidays</th>
<th>Retreats</th>
<th>Residential Spas/Farms</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Healthy Eating</td>
<td>Gyms Sports</td>
<td>Day Spas</td>
<td>Spas/Farms</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Individual Treatments</td>
<td></td>
</tr>
</tbody>
</table>

Table 3.2: USA model of health tourism (Spivak 1999).
A critical finding of the ETC research is that consumers do not like being overtly 'sold' health tourism and further they do not believe that health can be obtained over a short period of time. Despite this the research shows the benefits of re-energising, relaxation, well-being and stress reduction are considered achievable. These findings support the current situation of perceived health tourism in the UK, which suggests that 'the whole health and fitness market is an elite and exclusive niche market' (ETC 2002: 29). That being the case there is an assumption that the health tourism market is not dependent on large volume but is a niche market which can exploit the clearly-established international trends toward shorter breaks taken throughout the year.

The ETC identifies five key segments of consumers for health tourism products: radicals, independents, seekers, conformists and sentimentals. Each segment has marginally different characteristics and as a consequence is attracted to slightly differing products. Table 3.3 lists each of these five categories and the characteristics which determine their likely choice of holiday, their likely attitudes when on vacation and their responses functional or emotional responses.
<table>
<thead>
<tr>
<th>Segment</th>
<th>RADICALS</th>
<th>INDEPENDENTS</th>
<th>SEEKERS</th>
<th>CONFORMISTS</th>
<th>SENTIMENTALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely choice of holiday</td>
<td>Exploration Novelty Experience/adv.</td>
<td>Tailored Interesting Away from crowds Proven Variety</td>
<td>Organised activity High profile Branded (fashion) Novel Ahead of 'the Jones'</td>
<td>Fully packaged Accepted Popular Predictable Brand/ kile-mark</td>
<td>Packaged Quiet Traditional Culture Predictable Entertainment outings and organised activity</td>
</tr>
<tr>
<td>Attitudes</td>
<td>Individualistic Adventurous Inwardly Referenced Spontaneous Inquisitive</td>
<td>Self-Assured Inwardly-referenced Functionally led Conservative Far-sighted Ordered</td>
<td>Organised Fashionable Externally-referenced Risk-averse</td>
<td>Organised Self-conscious Don't want to 'stand out from the crowd' Security Routine Familiarly Safety</td>
<td>Safe Careful Sharing Hospitable Organised Traditional Unselfish Disciplined</td>
</tr>
<tr>
<td>Functional</td>
<td>Vigorous Individual Activity New Experiences Self Determined Cutting Edge/ Experimental</td>
<td>Self Tailored Authentic Authoritative Cultural (e.g. Must Have Wider Context Proven)</td>
<td>Organised Activity Exclusive High Profile Treatments Branded (Fashion) Novel 'Ahead Of The Jones'</td>
<td>Accessible Fully-packaged Popular Therapies Mass market Predictable Brand (As kile-mark)</td>
<td>Maintenance Familiar Experiences Diet and exercise Professional Respect</td>
</tr>
</tbody>
</table>

Table 3.3: Consumer Segment Chart (Etc 2002:28)

**HEALTH MARKET CONTEXT**

Health as a holiday concept, means different things to different people e.g. recuperating from illness; improving well-being; responding to the health promotion agenda (stopping smoking, moderating alcohol consumption, eating a balanced diet, taking up exercise or a new sporting activity); or simply relaxing by escaping to a
peaceful area to de-stress from everyday life. For a region to target and develop this niche market the report suggests that:

Spas can be successfully geared to specific audiences or life-stages, or their facilities made available on a day basis to supplement other tourism packages. To safeguard a health market, however, targeting should be clear and whole-hearted since compromise will fail to attract, equally, the emerging market will stimulate the market to follow.

(English Tourism Council, 2002:29)

ETC (2002) explored the links between the key health tourism market segments and potential health tourism product development identifying five spa types: Seeker segment spa; Conformist segment spa; Independent segment spa; Radical outdoor adventure spa and Branded family spa.

SEEKER SEGMENT RESIDENTIAL SPA

Seekers are demanding clients who enjoy expensive luxurious treatments using high-profile commercial brands although they also want value for money. They are the core market for exclusive, expensive luxury high end of the residential spa market (see Table 3.4).

<table>
<thead>
<tr>
<th>SEEKERS SEGMENT SPA</th>
<th>EMOTIONAL CHARACTERISTICS</th>
<th>FUNCTIONAL CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRIMARY</td>
<td>External Expression of Values</td>
<td>High Profile Brand</td>
</tr>
<tr>
<td></td>
<td>Pampering</td>
<td>Luxurious</td>
</tr>
<tr>
<td></td>
<td>Aspiration</td>
<td>Personal Indulgence</td>
</tr>
<tr>
<td>SECONDARY</td>
<td>Health And Fitness</td>
<td>Up-To-Date</td>
</tr>
<tr>
<td></td>
<td>Image Maintenance</td>
<td>Club Class</td>
</tr>
</tbody>
</table>

Table 3.4: Seeker Segment Spa (ETC 2002:30)

From this perspective seekers perceive the high visibility of spas in the media and the central role of health, beauty and body culture as something positive that they want to experience. Seekers are motivated by conspicuous exclusivity and luxury. Luxury to the seeker segment is being afforded copious amounts of individual attention in a relaxed environment – their bodies are pampered and their image is flattered. Health to
the seeker is about looking good and feeling good. In order to attract seekers any new concept would need to incorporate high-profile commercial brands of spa products.

CONFORMIST SEGMENT SPA

Conformists, unlike seekers, prefer to combat the symptoms of modern life in a safe environment (see Table 3.5).

<table>
<thead>
<tr>
<th>CONFORMISTS SEGMENT SPA</th>
<th>PRIMARY</th>
<th>FUNCTIONAL CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMOTIONAL CHARACTERISTICS</td>
<td>Accepted and normal</td>
<td>Transparent; inclusive pricing</td>
</tr>
<tr>
<td></td>
<td>Restorative</td>
<td>Relaxed</td>
</tr>
<tr>
<td></td>
<td>Familiar</td>
<td>Egalitarian</td>
</tr>
<tr>
<td>SECONDARY</td>
<td>Health and fitness</td>
<td>Mainstream</td>
</tr>
<tr>
<td></td>
<td>Guilt-free</td>
<td>Try-out</td>
</tr>
</tbody>
</table>

Table 3.5: Conformist Segment Spa (ETC 2002:30)

Conformists view health symptomatically i.e. absence of health is not being well. The spectrum runs from ‘being ill’ through ‘not being able to cope’ to ‘not feeling yourself’. As a consequence health tourism may be viewed by conformists as ‘a good thing’ and a motivation about ‘feeling better for oneself and for family’. The main barriers to health tourism for conformists are spending quality time and money on themselves and away from family. Motivating conformists towards new health tourism products requires the incorporation of elements that convince them of the health benefits of spending money on themselves and how improving the quality of life may benefit to those they care for.

INDEPENDENT SEGMENT SPA

In contrast, independents are likely to need self-improvement and self-determination. Health is not optional and is an integral part of an independent’s lifestyle. Independents appreciate the benefits that emerge from the use of spas and view them
as sanctuary for relaxation. However, they are intimidated by spas which they perceive to be too conspicuously ‘flashy’, although they are willing to explore eclectic ways of improving their life. Independents are likely to be ‘joiners’ and ‘doers’ so may well have an interest in alternative therapies and oriental philosophies. They are open to new ways of thinking and take the opportunity to explore and embrace new ideas. The primary goals of independents are self-exploration and self-improvement, where lifestyle demands relaxation and re-invigoration where notions of health merge into other cultures. An issue for independents is that they tend to feel they are not ‘worthy’, but are drawn to anything that offers the opportunity to learn (see Table 3.6).

<table>
<thead>
<tr>
<th>INDEPENDENT SEGMENT SPA</th>
<th>EMOTIONAL CHARACTERISTICS</th>
<th>FUNCTIONAL CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRIMARY</td>
<td>Self Expression</td>
<td>PRIMARY</td>
</tr>
<tr>
<td></td>
<td>Personal Maintenance</td>
<td>Authenticity</td>
</tr>
<tr>
<td></td>
<td>Life Enhancement</td>
<td>Unique</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Character/Environment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New/Interesting Treatments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Opportunity for Learning</td>
</tr>
<tr>
<td>SECONDARY</td>
<td>Health and Fitness</td>
<td>SECONDARY</td>
</tr>
<tr>
<td></td>
<td>Pampering</td>
<td>Pampering</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sports and Exercise</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sociable</td>
</tr>
</tbody>
</table>

Table 3.6: Independents Segment Spa (ETC 2002:30)

Attracting independents to health tourism requires spa managers to combine treatments and classes, such as yoga, Tai Chi and meditation, to add an extra dimension to any standard activity.

**RADICAL OUTDOOR ADVENTURE SPA**

Radicals seek ‘out of the ordinary’ adventure experiences on a ‘pay-as-you-go’ basis and view health holistically, intrinsically mixing activity and relaxation. The radical’s view is about ‘being me and doing what I like’ in order to balance the ‘work hard play
hard', ethic of this market segment (ETC 2002: 32). Radicals create trends by independently discovering locations. The primary drivers are specialist activities and holistic appeal (See Table 3.7).

<table>
<thead>
<tr>
<th>RADICAL OUTDOOR ADVENTURE SPA</th>
<th>FUNCTIONAL CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EMOTIONAL CHARACTERISTICS</strong></td>
<td><strong>PRIMARY</strong></td>
</tr>
<tr>
<td>PRIMARY</td>
<td>• Non-Prescriptive</td>
</tr>
<tr>
<td></td>
<td>• Non-Marketed</td>
</tr>
<tr>
<td></td>
<td>• Excellence</td>
</tr>
<tr>
<td>SECONDARY</td>
<td>• Safe Environment</td>
</tr>
<tr>
<td></td>
<td>• Family Space</td>
</tr>
<tr>
<td></td>
<td>• Adult Activities</td>
</tr>
<tr>
<td></td>
<td>• Crèche</td>
</tr>
</tbody>
</table>

Table 3.7: Radical Outdoor Adventure Spa (ETC 2002:30)

Radical's ideal break is about self-expression through activities which is self discovered, they understand that health is about body and spirit and see no contradiction in mixing therapies with activities - sporting activities late morning to late afternoon (radicals are not early risers!) followed by a jacuzzi spa bath and a deep massage early evening to aid relaxation followed on by a visit a gastro pub.

**BRANDED FAMILY SPA**

The 'family spa' must be branded. This spa cuts across the segments because the 'family' is its most defining characteristic (see Table 3.8).

<table>
<thead>
<tr>
<th>BRANDED FAMILY SPA</th>
<th>SEGMENT SPA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EMOTIONAL CHARACTERISTICS</strong></td>
<td><strong>FUNCTIONAL CHARACTERISTICS</strong></td>
</tr>
<tr>
<td>PRIMARY</td>
<td>PRIMARY</td>
</tr>
<tr>
<td>• Nurturing/Togetherness</td>
<td>• Wide Choice</td>
</tr>
<tr>
<td>• Fun</td>
<td>• Tailor-made feeling</td>
</tr>
<tr>
<td>• 'Our' Time</td>
<td>• Range of activity for the whole family</td>
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<td>SECONDARY</td>
<td>SECONDARY</td>
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<td>• Health and Fitness</td>
<td>• Safe Environment</td>
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<td>• Family Space</td>
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<td>• Adult Activities</td>
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<td>• Crèche</td>
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Table 3.8: Branded Family Spa (ETC 2002: 30)
The concept of ‘family health tourism’ is based on the assumption that ‘family time’ is child-focused with parent’s priorities dedicated to ‘family time’ above ‘their time’. In this context, child entertainment is paramount. Health is a secondary benefit however and much of the family entertainment will be focussed on activities. Health and wellness benefits must also be fun. The branded family spa is also like to appeal to other consumer segments, e.g. seekers and conformists in the longer term, who want something different, natural, cultural and offering variety although the activities on offer may need to be adapted over time to appeal to these other segments. Center Parcs is an example of a branded family spa which offers healthy family entertainment and promotes wellness. It might also suit radicals who like therapy and activities, independents who enjoy yoga and meditation and conformists who do not like being away from the family.

3.4.4 RESORTS AND SPA TOWNS THAT MIGHT BENEFIT FROM HEALTH/SPA TOURISM

Branded family spa can be based on local distinctiveness and that spa towns can regenerate their natural spa facilities (curative and contemporary) and cultural heritage by targeting independents and seekers for residential and non-residential visits, blending local distinctiveness and cultural heritage ETC (2002). ETC also suggest that all accommodation businesses are able to exploit the health tourism niche, regardless of size. Larger hotels can invest in spa facilities, providing a mix to appeal to targeted segments and different life stages. Although they found that bed and breakfast and guest house operators are unlikely to be able to offer spa facilities themselves they could package concessionary deals to facilities operated by other providers of appropriate quality. Potential health tourism accommodation providers can exploit their location and natural local distinctiveness, be it mountain, lake, seaside or rural setting.
as well as offering healthy eating options and provide optional extras to add value, ‘such as visiting massage or other treatments’ (ETC 2002:29).

3.4.5 WORKING IN PARTNERSHIP WITH LOCAL STAKEHOLDERS TO CREATE A HEALTH/SPA TOURISM CONCEPT

The ETC (2002) findings indicate the greatest potential for gaining a benefit from health tourism is by working in partnership at a regional or local level.

Health tourism offers local authorities the opportunity to improve facilities for local residents as well as attracting visitors. It provides a way of bringing the leisure and medical industries together for new services.

(English Tourism Council, 2002:29)

Regional strategic bodies (such as the Mid Wales Tourism Partnership) are best placed to advise on the regional mix of health tourism facilities, marketing, pricing, best practice, helping businesses to balance the range of health breaks in the region and fitting in with a regional brand.

3.5 STAKEHOLDERS: A THEORETICAL BACKGROUND

It could be suggested that a region wishing to embrace health tourism as a regional development concept should in the first instance consider the position of stakeholders who have a vested interest in any proposed development. Friedman et al (2002:1) posits that stakeholder theory ‘has burgeoned in recent times’, Donaldson et al (1995:65) also notes that ‘there are more than 100 articles and a dozen books all primarily concerned with the concept of “stakeholder”’. Halligan (1998 cited Friedman et al 2002:6) shows how references to ‘stakeholders’ are commonplace in the media, particularly since the UK government’s use of the term in specific policies, e.g. the introduction of ‘stakeholder pensions’ as an integral theme within the Labour Party manifesto (2000) which centred on the ‘stakeholder economy’.
The concept of a 'stakeholder' is generally accepted in a business context (Bronn et al. 2003: 293) with the modern concept of a stakeholder based upon Freeman's (1984) definition as cited in Sternberg (1996: 6) that a stakeholder in an organisation is (by definition) 'any group or individual who can affect or be affected by the achievement of the organisation’s objectives'. Mitroff (1983: 4) expands the definition of stakeholder as 'the concrete entities that affect and in turn are affected by an organisation's actions, behaviours and policies'.

On another level Sternberg (1996: 4) argues that 'stakeholder theory' is the doctrine that businesses should be run not just for the financial benefit of their owners, but rather for the benefit of all of their stakeholders. While this is clearly an oversimplification of Sternberg's well-presented argument, the core of her supposition becomes more evident when she expresses her view on why stakeholder theory has become so popular. She asserts (p4) that one reason is that first: 'the implications (of stakeholder theory) are not recognised and second, the theory seems to offer a 'free lunch' therein attracting those who would wish to 'enjoy the benefits of business without the discipline of businesses'? She does, however, concede two distinct ways in which the concept could be valuable: first, as a 'convenient reminder' and second, as 'the key to social responsibility (Sternberg 1996: 4). As with Freeman's broad definition, stakeholder literature generally agrees the entity of whom and what can be stakeholders or potential stakeholders, they can be seen as any of the following: groups, neighbourhoods, organisations, institutions and natural environments.

Understanding stakeholder theory from the viewpoint of these writers, when describing the management environment is difficult since their views and interpretations of stakeholders appears to mean anyone interacting with the organisation in any capacity. A more narrow definition is provided by the Stanford Research Unit (1963) who define
stakeholders as those groups 'on which the organisation is dependent for its continued survival' (Freeman et al. 1983: 91). Mitchell et al. (1997: 853) suggest that the major difference between the broad and narrow views of stakeholder theory are based upon the practical realities of limited resources, time and attention combined with limited patience for managers who are dealing with extraneous issues. They propose a need to be able to 'reliably separate stakeholders from non stakeholders' (Mitchell et al. 1997: 853), and go on to propose that stakeholders can be identified by their real or attributed possession, or otherwise, of the following combination of attributes:

- The stakeholders **power** to influence the firm;
- The **legitimacy** of the stakeholders relationship with the firm;
- The **urgency** of the stakeholders claim on the firm.

They then seek to present the three key attributes of power, legitimacy and urgency as identifiers of stakeholder classes.

Table 3.9: A stakeholder typology based on possession of the attributes of power, legitimacy and urgency (Adapted from Mitchell et al. 1997)
3.6 FRAMEWORK FOR A COMPETITIVE HEALTH/SPA TOURISM DESTINATION

In developing a blueprint for a competitive health/spa tourism destination which might be a feasible coherent strategy for economic regeneration in Mid Wales certain key elements need consideration (see Figure 3.6).

A destination needs to consider its comparative advantage – its reputation, its landscape and its people that distinguish it from other destinations and make it unique. The destination must then have an appropriate infrastructure for development – transport, telecommunications, hospitals and schools/colleges. Good infrastructure provides a solid foundation for development of tourism superstructure – attractions, activities, accommodation and food and beverage providers - which will in turn require appropriate human resources that are well-trained. Festivals and events can be used as a focus for showcasing the heritage and unique characteristics of the destination. At the centre of all this the spa – whatever type is chosen – is able to act as a focus for the health tourism proposition and provides opportunities for links to other sectors – light manufacturing, pharmaceuticals and agriculture/horticulture for the development of the therapy products that are a critical component of remise-en-forme. The framework allows for a series of questions to be set and for key performance indicators to be identified which will enable the feasibility of the blueprint for health tourism as a vehicle for economic regeneration within a region to be monitored and evaluated.
3.7 CONCLUSIONS

Ritchie and Crouch (2003) offer a model of a competitive tourism destination which can be customised as a framework for a competitive health/spa tourism destination. If Powys is to use its spa history as a basis for developing health/spa tourism as a vehicle for economic regeneration and building a coherent identity and market proposition around this then it must be cognisant of the subtleties that underpin this market.

The concepts of health and illness are at opposite ends of a spectrum. The history of spas reflects a shift along this spectrum from being predicated on curing illness to
being predicated on lifestyle and the promotion of health and wellness. The modern spa proposition is highly sophisticated and focuses on addressing the issue of stress which is endemic in today’s society. ETC emphasise the relationship between spa design and the market segments that will be attracted.

In the case of Powys it is important that it attracts markets that will draw on its other resources and so builds a health/spa tourism proposition that enables a virtuous circle of regeneration opportunities. In building such a proposition Powys will need to develop a consensus amongst stakeholders. Stakeholder theory offers insight into the key characteristics of stakeholders – power, legitimacy and urgency - which enables their categorisation and hence their management.

The next chapter will take the framework for a competitive health/spa tourism destination and use it to develop the research approach and the methods that will be used to collect data to inform the framework and develop a blueprint for health/spa tourism as the basis for regeneration in Powys. It develops the methodology for two cases studies. The first case study of French spas (Auvergne and Saint Malo) confirms the framework and emphasises key success factors for modern-day health/spa tourism. The second case study of the Bath Spa Millennium Project explores how major regeneration projects can be implemented through public-private partnership.
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CHAPTER 4

METHODOLOGY

4.0 INTRODUCTION

The aim of this thesis is to develop a framework for a competitive health/spa tourism destination in Mid Wales and to explore the potential of health/spa tourism, and specifically a spa trail, through the development of a blueprint for health/spa tourism in Mid and South Powys. This thesis will attempt to answer the following research questions:

- What are the essential ingredients required to facilitate the regeneration of the health/spa tourism industry?
- Have the regions of Mid and South Powys got the basic ingredients required to be a player in the health/spa tourism market?
- What additional ingredients and requirements does Mid and South Powys need to bring about a successful economic regeneration through health/spa tourism?
- What would a blueprint for health/spa tourism in Mid and South Powys look like? And what actions would be required by stakeholders to achieve it?

From these four research questions flows the research agenda, this chapter will describe the methodological approach and the specific methods that were selected to achieve the five objectives of this study:

1. Undertake a critical review of relevant literature on health/spa tourism and destination competitiveness to develop a theoretical model of best practice for a competitive health/spa tourism destination.

2. To identify and analyse case studies of traditional and remise-en-forme health/spa tourism destinations in the Auvergne region and Saint Malo in
France to provide an in-depth analysis of specific elements of the framework for a competitive health/spa tourism destination developed in objective 1.

3. To identify the key issues in the implementation of a major public/private sector spa tourism regeneration project.

4. To audit the resources in Mid and South Powys which can be exploited for the development of health/spa tourism trails and thus regenerate Mid and South Powys as a health/spa tourism destination and contribute to its economic regeneration.

5. To develop a blueprint for the economic regeneration of Mid and South Powys using the vehicle of health/spa tourism and focusing on the development of a spa trail.

4.1 RESEARCH OVERVIEW

In practice good social research is a matter of ‘horses and courses’, where approaches are selected because they are appropriate for specific aspects of investigation and specific kinds of problems. They are chosen as ‘fit for purpose’. The crucial thing for good research is that the choices are reasonable and that they are made explicit as part of any research report.

(Denscombe, 1998: 3)

In developing this thesis I have tried to ensure that the research approach selected was the most appropriate and ‘fit for purpose’. The research required the generation of rich qualitative data to enable an in-depth understanding of the concept of health tourism and to develop a blueprint for health/spa tourism. There were several challenges in this research. The first was to develop a unified theoretical model for a viable health tourism destination. The second was to explore selected health/spa tourism
destinations as case studies to identify key elements of good practice to inform a blueprint for a health/spa tourism destination in Mid Wales tailored to local needs and circumstances. The third challenge was to identify good practice in relation to the implementation of a major project through public-private partnership. I looked at Bath Spa as a relevant and topical example. The fourth challenge was to identify gaps in the Powys scenario in relation to its development as a health/spa tourism destination and to develop an action plan from this.

Crotty (1998:3) identifies four key elements in any research process:

What methods do we propose to use?
What methodology governs our choice and use of methods?
What theoretical perspective lies behind the methodology in question?
What epistemology informs the theoretical perspective?

He also identifies that these four elements – epistemology, theoretical perspective, methodology and methods - form a research string with each element informing the next (see Figure 4.1). These elements go in pairs – epistemology and theoretical perspective comprising the theoretical approach and methodology and methods comprising the practical approach. Crotty (1998) describes the theoretical approach as more fixed and the practical approach as more flexible and dependent on the objective to be achieved.
In the design of this study case study methodology informed the research approach and the various qualitative methods used to collect relevant data for each case study were selected as most appropriate according to the needs of the case study. The rich qualitative data thus generated was interpreted to construct the blueprint for a health/spa tourism destination and the action plan for Powys. Thus, constructionism, interpretivism, case study and various methods (interviews, direct observation, document analysis and archival records) became the research string for the study.
4.2 THEORETICAL APPROACH

4.2.1 CONSTRUCTIONISM

Constructionism sees a reciprocal and interdependent relationship between objects in the world and consciousness:

no object can be adequately described in isolation from the conscious being experiencing it, nor can any experience be adequately described in isolation from its object

(Crotty: 1998:45)

So there is no essential meaning to be found within objects or the world that is independent of consciousness. All things depend upon human beings for their
meanings. But objects are not completely irrelevant to the meanings that are made about them. While context gives rise to different meanings about the same object, the object, with its particularities, participates crucially in the meanings made about it.

Constructionism accepts multiple interpretations of an object none of which are objectively 'true' or 'valid'. Research is not self-reflexive, but seeks to know more about the object under study. Constructionism emphasizes the cultural and institutional origins of meaning. It is not that individuals make sense of phenomena in the world on a case-by-case basis. Culture brings some things into view and endows them with meaning, and leads us to ignore other things. Culture provides the lens through which we view phenomena and make sense of them. There is no distinction between the construction of physical and social realities, both are social constructions. In this study the physical reality of the French spa towns' and the alternative perspectives of the various stakeholders will be used to construct a model for health/spa tourism which will be applied to an analysis of the physical reality of Powys and its stakeholders and the development of a blueprint and action plan for health/spa tourism in Powys.

4.2.2 INTERPRETIVISM

Interpretivism is the systematic analysis of actions through direct detailed observation of people in natural settings to reach an understanding of how they create and maintain their social worlds (Neuman, 2000). Myers (1997) argues that interpretive research attempts to study a phenomenon in its natural settings and interpret the phenomenon through the meanings that people assign to them. Interpretive research is fundamentally concerned with meaning and it seeks to understand social members' definition of a situation (Schwandt, 1994:118). In the case of this study the phenomenon under consideration is that of health tourism and what it might mean for
the specific situation in Powys. The study draws on interpretations of health tourism destinations in France to select elements of use in Powys. It also draws on interpretations of good practice in relation to the implementation of major projects through public-private partnership from Bath Spa and applies them to the specific situation in Powys. As a result of these interpretations the overall aim of the study is achieved, i.e. develop a framework for a competitive health spa tourism destination and to explore the potential of health/spa tourism, and specifically a spa trail, through the development of a blueprint for economic regeneration in Mid and South Powys.

4.3 PRACTICAL APPROACH TO DATA COLLECTION

Case studies were a critical element of the research design and vehicle for data collection. Despite being described by Yin (2003: xiii) as a 'weak sibling among social science methods' case studies are widely used in the social sciences, especially 'when 'how' or 'why' questions are being posed ... and when the focus is on a contemporary phenomenon within some real-life setting' (Yin 2003: 1). This study used three case studies. The first case study was of the Auvergne and Saint Malo in France with the objective of identifying the key elements of a blueprint for a best practice health/spa tourism destination. Language was a significant challenge in the development of this case study, particularly in the rural Auvergne. I was fortunate to be working with French colleagues who were able and willing to conduct interviews in English and to act as translators for documents in French. The second case study was of the Bath Millennium Spa project and was designed to identify key issues for the implementation of major economic development and regeneration projects through public-private partnership. The third case study of Powys involved an audit to identify the differences between gap between practice in Powys and those in the idealised blueprint for best
practice health/spa tourism destination informed by lessons for success derived from the French case studies.

Yin (2003: 22) emphasises the importance of ‘defining what the ‘case’ is’, i.e. the unit of analysis being considered in the case study. In the case of the French case study, which is a multiple case study, the unit of analysis is the individual spa towns of Vichy, La Bourboule, Châtel-Guyon in Auvergne and Saint Malo. In contrast, the Bath Millennium Spa case study is a single case study. The Powys case study is different again and is an embedded case study (Yin, 2003). Powys is treated as a single case although it comprises a number of individual spa towns which eventually become the nodes on the proposed spa trail which emerges from the study. ‘Each unit of analysis would call for a slightly different research design and data collection strategy’ (Yin 2003: 24).

There is considerable debate about whether it is appropriate to generalize from case studies. Yin (2003: 10) was quite clear that case studies are ‘generalizable to theoretical propositions and not to populations or universes’. Gomm, Hammersley and Foster (2000: 3) suggested that ‘the aim of case study research should be to capture cases in their uniqueness, rather than to use them as a basis for wider generalization of for theoretical inference of some kind’ and went on (p5) to assert that ‘what is crucial is the use others make of them: that they feed into processes of ‘naturalistic generalization’ … or facilitate the ‘transfer’ of findings from one setting to another on the basis of ‘fit’. It is in this way that the lessons for success derived from the health/spa tourism destinations in the case study of France are used to develop the theoretical proposition for health/spa tourism destinations in Mid Wales.
Yin (2003) explains that case studies involve multiple sources of evidence: documents; archival records; open-ended interviews; observations (direct and participant); structured interviews and surveys and focus interviews (see Figure 4.2) Case studies are therefore multiple method research strategies and build data triangulation into the research design, i.e. the use of data from different sources ‘to corroborate the same phenomenon’ (Yin, 2003: 99). In the case of both the French case study and the Bath Millennium Spa case study data was collected by several methods from four spa destinations, the three in the Auvergne and Saint Malo. These methods involved interviews, document analysis and direct observation. In the Powys case study this list of methods was supplemented with data collected from archival records. The various methods used to collect data in the selected case studies are described in turn below.
Chapter 4: Methodology

Figure 4.3: Major phases of the research study
INTERVIEWS

Day (1993:14) and Seale (1998:202) said that interviews were ‘probably the most commonly used method in social research’. Although interviewing has a number of advantages and disadvantages; one major advantage is its adaptability. Bell (1998) suggests that a skilful interviewer can follow up ideas, probe responses and investigate motives and feelings. This is something which a questionnaire can never do, since questionnaire responses have to be taken at face value. In contrast, a response in an interview can be developed and clarified generating rich qualitative data. The disadvantages are that interviews can be time consuming, subjective and thus open to the danger of bias. Bell (1998) holds the view that analysing responses can present problems, and suggests that wording the questions is almost as demanding for interviews as it is for questionnaires.

This study used unstructured interviews with key witnesses in the selected French case study destinations and also in Powys and semi-structured interviews were conducted with the key witnesses in the Bath Spa case study. In France the interviewees were Mme Marie-Paul Connan, a member of the Human Resource Task Force in Brussels, Mme Nicole Picard Director of Studies INFATH, Monsieur Marc Peppi Managing Director the Hotel Splendid Châtel-Guyon and Dr Denise Pepin, a hydrologist at Evian Water. All four of these people were colleagues on the various European Union that are identified in Chapter 1 of the thesis. The interviews were extremely informal and unstructured and took the form of conversations in social contexts at various places and at various times. This informality was critical to the richness of the data that was collected and gave an opportunity for the respondents to be free to expand the conversation and speak about issues of central significance to their agency and from their experience. Contemporaneous notes were taken.
In the development of the Bath Spa case study the interviews were quite different. Interviewees were key project officers - Rhodri Samuel (the Bath Spa Project Coordinator), Mike Gray (the Bath Spa Project Director) and Paul Simons (the Bath Spa Project Manager). These individuals were identified through a telephone conversation with B&NES and consented to be named explicitly in this thesis. Rhodri Samuel was the key contact and he brought with him to the interview the other two officers. This interview was much more formal and the question schedule was submitted to Rhodri Samuel prior to the interview. The question schedule for this interview is shown in Appendix 2. Open-ended questions were used. Open-ended questions have several advantages, particularly that ‘they are flexible and allow the interviewer to probe to allow more depth’ (Cohen et al., 1998:277). In the case of this study they encouraged the interviewee to co-operate and helped to establish rapport between the interviewee and the interviewer. The questions were designed to enable the interviewer to elicit the likely political, economic, social and technological restraints and opportunities for a blueprint for exploiting health/wellness tourism as an economic driver in the USV and Mid Powys.

In Powys as in the French case study the interviews were unstructured and informal. Through my work in Coleg Powys I was involved in a number of meetings with representatives of the local authority though the Healthy Lifestyles Round Table. One representative who was particularly useful in the context of this was Gareth Oldham, Head of Leisure Services for PCC and Chair of the Healthy Lifestyles Round Table. Another representative of PCC was Jeremy Wright, Head of Economic Development for PCC and Michiel Blees Manager of the Llandrindod Wells Spa Town Trust and the late David Baird-Murray and his son Justin, owners of the Hotel Metropole, Llandrindod Wells. These unstructured interviews again took the form of conversations in which contemporaneous notes were taken. Again the conversations took place over a long
period of time – with Gareth Oldham generally following the Healthy Lifestyles Round Table meetings, with Jeremy Wright in his office, with Michael Blees in my office in Coleg Powys and at the Hotel Metropole with David and Justin Baird-Murray.

Permission was sought from the interviewees for how the data would be used in this research project at the outset. Bell (1998: 53) cautions that: ‘researchers who have ignored the courtesies and processes of clearing official channels or have overstepped ethical bounds can do great harm’. With this in mind the British Psychological Society has produced supportive guidelines on ethical principles for research with human subjects who cover issues, such as deception concerning the purpose of the investigation and encroachment on privacy and confidentiality. The writer was mindful that strict ethical standards should be maintained at all times.

Wragg (1980:64), writing about interviews posed the question: ‘Would two interviewers using the schedule or procedure get a similar result?’ and ‘would an interviewer obtain a similar picture using the procedures on different occasions?’ Data must be examined critically for the purpose of assessing the extent to which it is likely to be both reliable and valid. The check for reliability for this study was at the stage of question wording. Kitwood (1997 cited Cohen et al 1998:282) in his critique of the interview as a research tool draws attention to the conflict it generates between the traditional concepts of reliability and validity. This is where increased reliability of the interview is brought about by greater control of its element: this he argues is achieved at the cost of reduced validity. He explains his reasoning by saying that in proportion to the extent to which ‘reliability’ is enhanced by rationalisation, ‘validity’ would decrease. He suggests that a solution to the problem of ‘reliability’ and ‘validity’ might lie in the direction of a ‘judicious compromise’. This compromise is based on the conception that reliability
and validity become 'redundant notions' since (Kitwood 1997 in Cohen et al 1998) argues that for every interpersonal situation:-

*may be said to be valid, as such, whether or not it conforms to expectations, whether or not it involves a high degree of communication, and whether or not the participants emerge exhilarated or depressed.

(Kitwood 1997 cited Cohen et al 1998:284)

Whilst this study sought complete objectivity, the words of Gavron (1966: 159) echo:

*It is difficult to see how bias can be avoided completely, but awareness of the problem plus constant self control can help*

(Gavron 1966:159)

Awareness of objectivity must be achieved throughout the interview and particularly in the subsequent data analysis. The use of the question schedule as a checklist and aide memoire reminded the interviewer of the formal data requirements throughout the interview. Objectivity was a particular challenge during the analysis stage of the research because, as outlined in Chapter 1, the researcher had considerable experience of spa and health tourism and was a critical tool in the analysis process.

**DIRECT OBSERVATION**

Direct observation in each of the health tourism case study destinations was recorded through the use of photographs. Verbal permission was sought from the individuals depicted in the photographs for use of the photographs in the thesis. The field visits were effectively data collection and analysis opportunities and the photographs served to provide documentary evidence of the physical reality of the case studies which were then used in presenting the various cases in the results chapter.
DOCUMENT ANALYSIS

In all three case studies - France, Bath Spa and Powys - brochures and websites were an invaluable source of information about the destinations, the products and particularly the way that these are marketed and branded. Silverman (2005: 160) identified the challenges of analyzing 'written material in a way that will produce reliable evidence'. He suggested that this challenge is generally overcome by the use of categories. In this study the various texts were analyzed using the categories identified in the unified theoretical model emerging from the literature review (see Chapter 3). Atkinson and Coffey (2004 cited in Silverman, 2005: 160) caution that documents:

'are 'social facts' in that they are produced, shared and used in socially organized ways. They are not, however, transparent representations of organizational routines, decision-making processes, or professional diagnoses. They construct particular kinds of representations with their own conventions'.

ARCHIVAL RECORDS

A considerable amount of data on the history of the Powys spas was gleaned from the Radnorshire Society, the archives of which are housed at Coleg Powys in Llandrindod Wells. This data was used to independently corroborate data from Internet sources.

4.4 CASE STUDY ANALYSIS

Bell (1996: 125) states that: 'data collected by means of questionnaires, interviews diaries or indeed any other method means very little until they are analysed and evaluated'. For qualitative studies when the researchers needs to undertake major information from statistical evidence there is a range of computer software, such as
NUD.IST and Atlas Explorer (for which the researcher has received training and has access to). However, in this study, manual methods of data analysis were selected in preference to computer-aided methods because:

- The researcher wanted to immerse herself more closely with the data without the potential barrier of the computer tool;
- The numbers of interviews were relatively small and it was felt that the time penalty in inputting the data would not be offset by time saving in the analysis phase.

Some researchers fear that computer packages encourage the unprincipled application of highly-sophisticated tools in place of serious analysis. Halil (1989 cited Braun et al. 1998:133) argues that it is possible that 'if you torture data sufficiently it is bound to confess something'.

The unified theoretical model developed in Chapter 3 was used as the organising framework for the analysis of the data from the various case studies. In the French case study cross case synthesis was used for the analysis of the multiple case studies of Vichy, La Bourboule, Châtelet-Guyon and Saint Malo. Through this relevant elements of good practice were identified and built into the blueprint for a health/spa tourism destination developed in Chapter 5.

4.5 CONCLUSIONS

This chapter has presented the logic for the research design. The research will adopt a case study approach comprising three distinct case studies (see Figure 4.3). The first case study of French spas explores the appropriateness of the theoretical framework
developed in Chapter 3 as a framework for a competitive health/spa destination. Chapter 5 will present the case study of France focusing on the spa towns of Vichy, La Bourboule and Châtel-Guyon in the central Auvergne region of France and Saint Malo on the west coast of France in Brittany.

The second case study of the Bath Spa Millennium project explores the achievement of a major regeneration project through public-private partnership. Chapter 6 presents the case study of Bath Spa Millennium Project.

The third case study of Powys audits resources identifying gaps between the resources on the ground and the theoretical framework and the issues that Powys will need to address to achieve the framework. Chapter 7 present the case study of Powys. From this a blueprint for Powys as a competitive health/spa tourism destination is developed and an action plan relating to the achievement of that blueprint outlined. These are presented in Chapter 9.
CHAPTER 5
CASE STUDY: SPA REGIONS OF FRANCE THE AUVERGNE AND SAINT MALO

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CHAPTER 5

CASE STUDY: SPA REGIONS OF FRANCE: THE AUVERGNE AND SAINT MALO

5.0 INTRODUCTION

This chapter develops four case studies of the French spa industry – three in the Auvergne and Saint Malo in Brittany selected to inform the development of a blueprint for a viable health/spa tourism destination in Powys. Section 5.1 opens with a short history of the French spa industry, explaining the current role of the state in the spa sector which is critical to the economic viability of the spa industry and moves on to discuss human resource requirements of the industry and the professional organisations that represent the French spa industry. Section 5.2 then presents the case studies of three traditional French spa destinations in the Auvergne: Vichy; La Bourboule; Châtel-Guyon. The fourth case study Saint Malo – is presented in Section 5.3. Each case study is presented in the same format using the elements of the theoretical model presented at the end of the literature review (see chapter 3): comparative advantage; infrastructure; tourism superstructure; human resource; training; links to other sectors; festivals and events; coherent marketing and promotion; branding. Section 5.4 presents a cross-case synthesis of the four case studies which is developed into a unified model of best practice (see Section 5.5) and provides the basis of the blueprint for health/spa tourism for Powys developed in Chapter 7.

The research findings for this case study were gathered through two separate study tours of the Auvergne and one of Saint Malo. The first Auvergne tour was in June 1991
when I was a partner in an EU project under Article 10.1(b) of EC Regulation 2052/88 'The Study and Evaluation of Health Spas as Potential Generators of Economic and Tourism Activity', which enabled important links to be made between the spa industry in Auvergne and Powys (see chapter 1). The second tour, based in Châtel-Guyon in June 2003, covered the ten spa towns. The Saint Malo study tour took place in 2004.

There are five key reasons for choosing spa regions within France as case studies to inform the blueprint for Powys as a health/spa tourism destination. First, the Auvergne region of central France has a long history of sustained economic development through its spas and treatments. Second, Auvergne and Powys are very similar in terms of underlying geomorphology, population, terrain, rurality and social and economic development (see Figures 5.1 and 5.2). Third, and related to the similarities in terrain, the regions have very similar products – water and a range of natural agricultural and other products. Fourth, both were designated EU Objective 5b regions between 1994 and 1999 and as Objective 2 regions from 2001-2007 which allowed them to have access to EU rural programmes, e.g. the European Agricultural Guidance and Guarantee Fund and the Rural Development Regulations which support farming and forestry and offer a flexible mechanism to address rural development needs and promote innovation through 'the rediscovery of rural heterogeneity' (Budapest Declaration 2002:14:4).

Figure 5.1: The Auvergne Volcanoes National Park (Auvergne Active 2007)  
Figure 5.2: Brecon Beacon National Park (Brecon Beacons National Park nd)
Finally, Saint Malo was selected a case study as it has recently, like Vichy in the Auvergne made significant progress in developing innovative approaches to remise-en-forme in a former traditional thalassotherapy spa region.

5.1. THE FRENCH SPA INDUSTRY

5.1.1 A SHORT HISTORY OF THE FRENCH SPA INDUSTRY

France has a long spa tradition. The Romans constructed many luxurious bathing centres around springs, including well-known spas such as in Vichy. These spas fell into rapid decline following the fall of the Roman Empire (around 500AD). Some thermal resorts managed to remain operational sustaining spa culture and associated practices.

The Church in France (as more widely across Europe) mistrusted spa culture, due to its pagan origins and closeness with witch-craft. However, in the 8th century the Church attempted to control the French spas for Christian healing and, during 786AD, Amelie-les-Bains (formerly known as Arles) was officially handed over to Benedictine monks at Montmajour by Charlemagne. During the crusades (1096-1270AD) spa culture achieved great popularity. French soldiers returning home brought many previously-unknown diseases with them, including leprosy (a chronically-infectious skin disease) and a special bathing pool - 'Le Bassin de Ladre’ – was constructed in 1260. Spa facilities were enhanced with Eastern/oriental spa traditions, such as steam baths. The Church controlled the spas until around 1500AD when the local authorities wrested their administration.

The Renaissance (1400-1600AD) saw renewed interest across Europe in all things classical - including spa – resulting in a period of great popularity and prosperity for the
French spas. Henry IV in 1605 ordered the first medical inspection of Aix-les-Bains, Les Eaux Chaudes and Eugenie-les-Bains and created the position of 'Superintendent General des Bains et des Fontaines'. This official post involved overseeing and protecting the upkeep and renovation of French spas since the King regarded them as important to the health of the people. It was during this period that the Royal Society of Doctors (France) was created after which each spa appointed a registered doctor.

Renovation and construction in French spas took place during the reign of Louis XIV (1661-1715) to accommodate members of the Court and the aristocracy whom spa resorts were fashionable. However, during the Revolution the spas lost their main clientele. 'Le Peuple' - the people of France – declared the spas as public property resulting in a long period of non-use and decline.

During the early 1800s, the government of the Second Republic (1848-1852) enacted legislation to protect and develop mineral resorts and springs. Napoleon III, who was a great believer in spa’s benefits, ordered that they be renovated and pump rooms, bathing centres with grand entrances and surrounding parklands were constructed. Additionally, he ordered that each resort must be controlled and regularly inspected by an appointed official. Central planning and control resulted in French spa resorts being sustained into the 20th and 21st centuries and treatments being made available through the French state health system as will be explained in the next section.

5.1.2 THE STATE AND THE FRENCH SPA INDUSTRY

Many French spas are based on medico-social treatments to cure specific illnesses, supported from the 1930s by strong state commitment to reimbursement schemes through legislation granting sécurité sociale (social security) for all French citizens and
allowing public access to French spas on medical prescription (see Chapter 3:16).
The comprehensive social security system covers healthcare, injuries at work, family
allowances, unemployment insurance, old age (pensions), invalidity and death benefits.

Spa treatment costs are regulated by the French government and tariffs proposed each
year by spa organisations for approval by the French Health Ministry. The number of
spa-goers in 1992 in France was 640,000 and the vast majority (90%) were sent by the
state for at least 18 days under close medical supervision (Weisz 2001). French
people referred via their doctors for spa cures must stay a minimum of 18 days.
Payment is complex. There is 100% cover for patients prescribed an 18-day cure by
their GP whose annual income does not exceed the ceiling set by the French Ministry
of Health. For others, the refund system works out as 65% of spa costs, 70% of
medical costs, partial coverage of lodging/transportation costs with the balance paid
made by the curiste - usually through personal insurance (e.g. Credit Mutuelle) (English
Tourism Council 2002:23). Claims for treatment costs are made to local social security
offices which pay the spa directly. Applications are submitted by referring physicians at
least 21 days before treatment commences. No communication from the social
security office means reimbursement will be made.

Additionally, since 1975, the French government has actively helped the development
of the spa industry through direct grant-aid from the Ministry of Finance enabling the
diversification and modernisation of some spas. Traditionally treatments offered at a
particular spa were very specific – for example La Bourboule treated asthmatic
conditions; Châtel-Guyon provided colonic irrigation. Thus, a spa was selected on the
basis of the patient’s condition. Diversification has resulted in more treatments being
available in some spas making them more popular with negative impacts on spas not
diversifying their treatment range. This trend has been further compounded by France’s aging demographics (Tapinos 2000).

There is a strong loyalty factor in relation to a particular spa by visitors to the Auvergne as noted by both Monsieur Marc Peppi (Manager of the Splendid Hotel, Châtel-Guyon) and Doctor Denise Peppin (a colleague of Monsieur Peppi’s and geologist from Evian Mineral Water Company). Some spas, e.g. Châtel-Guyon, with its mainly older clientele, had come to rely on this situation and not diversified their treatment range. Some families, whose parents and grandparents had been curistes in the town, had developed a family tradition of taking their main annual holiday in Châtel-Guyon. This tradition was reinforced by a belief in spas and their curative powers. However, the original curistes are now dying off and loyalty may not sustain visits by younger generations of the families.

Dr Jean-Baptiste Chareyras, who had practised in Châtel-Guyon for 24 years, emphasised some concerns in an interview with Father Marc Denes for the Châtel-Guyon parish magazine Parochial Journal: Together (1997). When he first practised in Châtel-Guyon Dr Chareyras recalled that there were about 20,000 visitors annually compared with less than 5,000 visitors annually in 1997. The initial problem he cited was fundamental and lay with the particular treatments available – Châtel-Guyon had consistently retained referrals for rheumatology but not gastrointestinal treatments. He endorsed the town’s decision to fund a study to investigate the introduction of further thermal treatments. He suggested that although the French social security would pay for the 18-day treatment many patients were reluctant to "sacrifice" three weeks of their vacation, especially since for many accommodation was often more costly than the cure itself! (Denes 1997). Today medical developments favour pharmaceutical treatments over spa treatments resulting in fewer doctors being trained in spa therapies.
and fewer spa prescriptions. The French government has responded to this situation by supporting new therapies developed from thalassotherapy and thalassoleisure activities particularly in the coastal resorts of France such as Saint Malo, where remise-en-forme is of major significance.

Thalassotherapy benefited from French Ministry of Health certification as a curative treatment under medical supervision in a privileged environment in 1899 the first thalassotherapy establishment opened in Roscoff, Brittany. Thalassotherapy treatments became very popular in France following the serious cycling accident of Louison Bobet in 1956 (Bobet was the first winner of three consecutive Tour de France titles (1953-1955) who attributed his cure to thalassotherapy (French Ministry of Foreign and European Affairs, nd). Subsequently, more thalassotherapy establishments opened dispensing treatments in rehabilitation and functional re-education centres. However, since 1999, French social security has classified thalassotherapy as preventative not curative – this is a significant distinction which allows patient’s only fractional re-imbursement (French Ministry of Foreign and European Affairs, nd). Thalassotherapy has recently diversified into remise-en-forme treatments attracting a younger, more active clientele who are more interested in well-being and non-medical treatments (French Ministry of Foreign and European Affairs, nd).

Remise-en-forme as a working concept is offered in Saint Malo and many Auvergne resorts, including Vichy, La Bourboule and - to a limited extent - Châtel-Guyon which has opened up the French spa industry and extended the spa concept into healthy lifestyle and wellness programmes. Remise-en-forme has accompanied wider diversification strategies, e.g. production of ranges of health, fitness and beauty products. Although ineligible for state reimbursement, doctors support the new
treatments through private referrals. An example of this is found in the Thermotel Remise-en-Forme brochure (2006) designed to advertise the hotels and their wellness treatments (see Figure 5.3).

The French Government also helps, to some extent, with training for the health/spa tourism industry, by subsidising some educational programmes. Help is given to investors in new spa developments through low-interest loans from the Fund for Economic and Social Development (FDES). The government is also heavily involved in the development of regional programmes, with new forms of finance being offered through state or regional co-financing.

5.1.3 HUMAN RESOURCES AND THE TRADITIONAL FRENCH SPA INDUSTRY

The spa industry is highly labour-intensive with jobs falling into two broad categories - cure-related jobs (including: doctors; nurses; pharmacists; dieticians; physiotherapists; technicians; medical supervisors; chemists and engineers associated with water quality and supply) and those with no cure-related content including:

- Administrators (computing, accounting, planning, reception and clerical staff);
Social staff (hosts and hostesses, excursion and entertainment organizers);
- Catering staff (managers, chefs, waiting staff, general catering staff, bartenders and cleaning staff);
- Housekeeping staff (housekeepers and cleaners);
- Drivers (chauffeurs driving clients from spa to hotel);
- Labourers (mud operatives; bottling staff and gardeners);
- Shop assistants (in retail outlets selling regional products);
- Tour guides (to give advice on local amenities, e.g. casino).

The training issues related to each job category are obviously very different. Each spa draws on a wide range of professions and skills and thus spas are an attractive option as a focus for economic development providing a large number of jobs many of which are high quality.

5.1.4 BODIES REPRESENTING THE FRENCH SPA INDUSTRY

The organisation representing French spas is the *Fédération Thermale et Climatique Française* comprising trade groups representing commercial spa interests with strong university representation. Additionally scientific groups (e.g. the Evian Institute of Hydrology) look at water quality and other special interest groups, e.g. the Organisation of Chartered Physiotherapists in Private Practice whose activities extend beyond France, promote cooperation between public and private bodies and national associations. Influential international organisations operating in France are:

- International Federation of Hydrotherapy and Climatology (FITEC) representing Thermal Spas and Climatic Resorts and promoting them internationally;
- Société Internationale de Technique Hydrothermale (SITH) promotes and disseminates spa technology transfer periodically holding a World Congress. Membership of SITH confers membership of Organisation Mondiale du Thermalisme (OMTH).
OMTH (also known as the World Spas Organisation) is based in Paris. OMTH’s role is unclear but the presentation of relevant technical papers to the World Congress is a condition of membership.

There are various international spa associations, e.g. Deutsches Bad Vermont - a German-based association, with membership drawn mainly from smaller, medically-based traditional spas and thus without market significance. The Fédération Internationale de Thalassothérapie was established in 1986, to regulate the thalassotherapy industry and guarantee the quality of treatments. Its kite mark is recognised as the industry’s quality label.

5.2 AUVERGNE

The Auvergne region is located in the heart of the Massif Central Highlands of France (see Figure 5.4) and famed for having over 80 volcanic craters - mostly extinct - and unspoilt open green spaces, dotted with lakes and forests. Two million years ago the Auvergne was home to the earliest Europeans and remains largely unchanged despite many, e.g. Caius Julius Caesar, and King Charles V11, having left their mark. Within the Massif Central there are two National Parks supervised by the National Park Service - Livradois-Forez Park and Auvergne Volcanoes Park. The region boasts 500 Romanesque Churches and 50 chateaux and derives great fame from the internationally-branded products produced in Vichy. The Auvergne has ten thermal spa resorts (see Figure 5.5): Bourbon-l’Archambault; La Bourboule; Châtel-Guyon; Chateauneuf-les-Bains; Chaudes-Aigues; Le Mont-Dore; Neris-les-Bains; Royat-Chamalieres; Saint-Nectaire and Vichy.
The Auvergne’s spa towns are all designed on a similar pattern - similar town plans, characteristic architecture and similar facilities, i.e. at least one thermal spa, a public bath, a pump room, a park with a bandstand and shady paths, a casino and luxurious hotels, good restaurants and refined tea-rooms. These pattern-book spa towns hold an elegant, timeless and distinguished air. While each spa has its own distinctive features they share the beauty, peace and tranquility of a remote countryside with good quality air and water and are supported through private use and a publicly-referred clientele. So the Auvergne spas gain benefit from a long thermal tradition with skilled, knowledgeable, trained staff.

Three of the Auvergne spas have been selected as case studies, i.e. Vichy, La Bourboule and Châtel-Guyon. Pen portraits of each case study will be provided in the next sections (see Sections 5.2.1, 5.2.2 and 5.2.3) followed by a comparative analysis of various elements of the model developed in the literature review for each of the three spas (Sections 5.2.4-5.2.12). Vichy was selected as a case study because it has used...
its spa tradition as the basis for economic diversification through knowledge exploitation and technology transfer into related markets. La Bourboule has diversified into outdoor pursuits. Both Vichy and La Bourboule have made major image shifts from illness - cure - to wellness - remise-en-forme. Châtel-Guyon has been much more conservative and has not diversified and as a result faces a much bleaker future.

5.2.1 VICHY

Vichy is a French commune (i.e. the lowest level of administrative division in France) with a population of 26,528 (in 1999) known as Vichyssois. Vichy’s fifteen thermal springs have had French Academy of Medicine recognition for their therapeutic properties since the 1800s. Vichy became spa capital of France in the 1800s when it developed a new railway system, casino and theatre, all funded from Imperial sources. Between 1852 and 1861 the number of curistes at Vichy rose from 7,000 to 16,000 and by 1870 Vichy saw about 24,000 curistes each season. To cater for this massive influx over 40 grand hotels were built (Vichy Spa Information Guide, 1991).
Napoleon III was originally responsible for Vichy's prominence when he installed his mistresses there in seven distinctive chalets. It was assumed that the energy expended during his visits in the 1860s derived from the remarkable restorative powers of the local springs. Under his patronage Vichy became famous as the Queen of Spas due in part to its all-important sparkling mineral waters rich in trace elements. Vichy established an impressive record for successfully treating post-operative effects of fractures and complicated injuries as well as rheumatic and arthritic conditions.

World War I impacted severely on Vichy. Towards the end of the war the resort was revived as a base for wounded soldiers and as a result of its popularity, Vichy became the seat of the collaborationist government in World War II. Its vast buildings were ideal for housing the ministries. Following Nazi occupation curistes did not return in the same numbers. In an attempt to reverse this decline and erase Vichy's troubled past, the French government invested in a fully-equipped atrium to re-establish Vichy as the spa capital of Europe. However, potential French curistes still shun Vichy because of its former political associations – a lead article in the Economist Newspaper (2007) asserted: "Vichy, and you can hardly avoid thinking of two things: mineral water and collaboration".

At the time of writing this thesis Vichy still retains a veneer of its past splendour and elegance but clearly needs regeneration. Many spa hotels in the city centre are being sold to property developers for conversion into apartments (see Figure: 5.7). In addition, many of the shops in the main shopping arcade are empty with the surviving businesses in decline and the premises in need of major repairs.
As early as the 1960s Vichy began to diversify its activities, primarily into sporting activities and language centres. More recently this effort has intensified and the town has partnered in schemes to re-launch Vichy as a major European centre for beauty, health, fitness and leisure. Considerable investment has been made in spa treatments, health farms, business tourism and hotels. This is in parallel to some architectural renovation and redevelopment of the town centre (Ville de Vichy 1999b).

The Vichy spas are undergoing phased regeneration. The first phase was in 1990 when the 'Compagnie Fermiere of Vichy' was launched. The company marketed a programme entitled Space-Beauty-Health and created a strategy of thermal projects costing 450 million francs and resulting in a new approach to health, fitness and entertainment in Vichy. The marketing campaign 10 Days in Vichy - 10 Days less focussed on spa packages aimed at slowing the ageing process. The campaign is underpinned by three major developments. First two new build enterprises: Les Callou (based on traditional spa treatments) and Les Célestines and a refurbished Centre Thermal des Dômes both of which are based on remise-en-forme. These major developments were all possible in the first instance due to the number of thermal
springs found in the city and the combination of private investment, public commitment and political will which helped ensure their economic viability.

**LES CALLOU**

Les Callou is a new high technological thermal establishment focused on rheumatology (80%) and digestive disorders (20%) built in 1990 (see Figure 5.8a and 5.8b). It receives about 30,000 curistes per year between April and December paid, in the main, by the state. Les Callou offers four cure regimes kickstarted by a medical consultation. First, a traditional spa 18-day cure - the only product reimbursable on social security - is for patients suffering chronic rheumatism and/or digestive problems and involves drinking the waters (see Figure 5.9) and receiving four prescribed treatments daily. The second cure regime is a basic 6-day spa treatment which involves drinking the waters with two prescribed treatments per day.

Figure 5.8a: Thermes de Vichy Callou (Maigrir Bien Etre Thermalism Reservation (nd))

Figure 5.8b: Thermes de Vichy Callou, Treatment Rooms (Ville de Vichy 1999c)

A third cure regime is a 12-day stays involving drinking the waters and three spa treatments per day. The fourth option is a short health stay for 7-14 days with a large range of treatments tailored to meet the requirements of active individuals.
LES CÉLESTINES

Les Célestins is a major spa and fitness complex completed in 1998 (see Figure 5.10a) and known for its remise-en-forme and fitness programmes (see Figure 5.10b).

THE CENTRE THERMAL DES DÔMES

The Centre Thermal des Dômes was modernized in 1991. It opens February and December and can provide 3,500 remise-en-forme treatments per year. It is linked directly to the Novotel Thermalia (see Figures 5.11), a 3-star hotel with menus offering regional cuisine (e.g. Truffade ham d'Auvergne) and facilities include a heated outdoor swimming pool, sauna and marine spa. The focus on regional cuisine is important in terms of developing a unique Sense of Place which helps to differentiate the destination.
Vichy has undertaken two diversification developments which draw in visitors: sport (and related activities) and language teaching. The most significant of these is Omnisport Park (see Figure 5.12) which was built (1963-1968) as a major sports campus for athletic training in the centre of Vichy bordering Lake Allier (an artificial lake created in 1963). Its indoor and outdoor facilities include number of grass and artificial sports pitches and a 300-seater athletic stadium and a judo hall and allow around 50 sporting disciplines to be practiced. The complex houses 239 beds and a 350-seater restaurant hall.

The Park also houses the Centre International de Séjour which allows sportsmen and women who are competing at the highest level a single complex which contains first-class sports fields, training halls, accommodation and restaurants facilities and a sports medical centre (Centre Médico - Sportif). The medical centre houses a team of trained medical personnel who provide support for the athletes.
The second significant development is the Cavilam Centre which is situated in the centre of Vichy on the Lardy Célestins-site in a renovated thermal building and offers courses in languages and multi-media communication to French and foreign students (see Figure 5.13).

Figure 5.13: Cavilam Language Centre (Tricolore nd)

The centre offers a wide choice of subjects, including conversation and writing skills and offers preparation for ordinary and advanced certificate of French Studies both of which are state certificates of French as a Foreign Language awarded since 1985 by the French Ministry of Education. TCF (Test de Connaissance du Français) is the French Education Ministry's official qualification and is a language test in standard French meant for non-French speakers and applies to anyone who wishes to study and speak French. In summer the centre also offers 'Langue et Loisirs' courses comprising 18 language lessons followed by afternoon golf, tennis in the Omnisports Park, hiking in the local countryside or 'remise-en-forme' in Les Célestins. Diverse accommodation is available for the student in halls of residence or in local studios and hotels.

5.2.2 LA BOURBOULE

La Bourboule is a French commune located in the département of Puy-de-Dôme (see Figure 5.14). It had a population of 2,043 in 1999 (Joomla 2006). It is situated in the National Regional Volcano Parkland which is famous for its Puys (volcanoes) which overshadow La Bourboule. La Bourboule was purpose-built in the early 20th century to exploit its natural resources of thermal waters and quality air. It has pattern-book
La Bourboule is a spa town with outdoor pursuits – mountain biking, swimming, fishing and walking. It is known as the 'capital of allergies' and promotes itself as a Fresh Air Resort with good reason since it lies in the shelter of a volcanic crest which includes the Banne d'Ordanche (1,512m), the Tenon (1,416m) and the Puy Gros (1,485m) overlooking the upper reaches of the Dordogne. Recently La Bourboule has developed winter sports activities to increase its tourism potential and develop the town into an all-year destination (see Figures 5.16a and 5.16b).
At an altitude between 850m and 1,150m, La Bourboule has a high-quality atmosphere with low levels of atmospheric pollutants against EU and WHO benchmarks which provides a basis for fighting allergies. La Bourboule's waters are reputed to strengthen the immune system and protect cells and tissues (Joomla 2006). The most significant buildings are all connected to spa and related activities, e.g. thermes, casino, hotels and restaurants built to entertain and support curistes when relaxing between cures. La Bourboule boasts several Belle Époque buildings which once housed privately-run spa hotels but are now boarded up giving the town a run-down appearance (see Figures 5.17a and 5.17b).

There are several government-sponsored private partnership developments in La Bourboule encouraging local entrepreneurs to develop new businesses on redundant spa treatment centres and outdated curiste hotel sites. Figure 5.17(b) shows one such site where a new mountain biking centre is proposed to support the emerging spa market for remise-en-forme which La Bourboule is encouraging.

The thermal spas treatments on offer in La Bourboule are based on the natural waters found locally and are used primarily to treat respiratory and dermatological complaints in adults and children (see Figure 5.18).
Following diagnosis a doctor prescribes a cure at a particular centre which sends the curiste an official brochure (see Figure 5.19) explaining the type, times and location of treatment they will receive to enable the curiste to reserve appropriate accommodation.

There are three spa centres in La Bourboule:

- Les Grands Thermes de La Bourboule (see Figure 5.20) offers traditional cure treatments from February to October. Significantly its traditional spa treatments have recently been supplemented with remise-en-forme treatments (e.g. sauna, hammam, Jacuzzi and piscine) although they are heavily equipment oriented and
not the beauty and holistic therapy treatments normally associated with remise-en-forme.

- Les Thermes Choussy (see Figure 5.21) is newly-built and is open from April to September. It caters for traditional spa referrals only.

- La Résidence Thermale Choussy (see Figure 5.22) is also newly-built and offers non-traditional spa treatments using the spa waters but entirely based on remise-en-forme. Treatments include Turkish baths, jacuzzi, hot-tubs, massage showers, toning solarium, facial and body beauty treatments.

During 2002 over 20,000 people came to take the waters in La Bourboule which relies mainly on referrals from general medical practitioners. Over 75% of the treatments were for children with upper respiratory complaints (e.g. asthma), ear, nose and throat and dermatological complaints (e.g. eczema) (La Bourboule Station Oxygene Guide Pratique 2002:6) (see Figure 5.23).
La Bourboule has a School of Asthma, open from June to September, to provide health education for asthmatic patients (adults, adolescents and children) on how manage their condition and enjoy enhanced quality of life (Digital Network Borvo, 2002).

Much of the outside sport in La Bourboule is centred in or on Le Parc Fenestre which offers 12 hectares of landscaped gardens and rare tree species. The park's outdoor facilities include a golf-course, a roller-skating-rink and four tennis courts. Indoor facilities include badminton courts, a table-tennis centre and a fitness centre. The park also houses the ubiquitous casino - Casino La Bourboule (see Figure 5.24) - first built in 1892 and extended in 1928 in art deco style.

Today the casino is mainly used as a cinema and is a host site for a major film festival for children and young people (see section 5.2.10). Le Parc Fenestre also has cable cars taking tourists from the town centre to the Charlannes Plateau (a major starting point for walks and mountain biking) in four minutes (see Figure 5.25). Recently La Bourboule has attempted to establish itself as a major mountain biking centre, hence the renovation of old Therme houses into a centre to develop this form of tourism.

La Bourboule is open all year. In winter it is a ski and snowboarding resort with networks of circular pistes, some over 20km long, and skiable paths connecting to
other ski centres, e.g. Sancy, Besse, Chastreix and Picherand (Avenue-Web Systèmes 2008a) (see Figure 5.26).

Figure 5.26: Ski La Bourboule, France (J2Ski Limited 2008)

However, during a brief visit in 2004 when speaking to the staff in the hotels and cafes, it was clear that most of the tourist facilities - gift shops, cafes, restaurants and hotels - were closed from November to May. One reason given was that the buildings were inadequately heated and to remedy this would take serious investment with insufficient business to warrant the investment. It also appeared that there were intentions to further develop the skiing market, but this would require a coherent marketing strategy and investment to develop sufficient suitable winter accommodation.

5.2.3 CHÂTEL-GUYON

The town of Châtel-Guyon is spelt variably - Châtelguyon, Chattell Guyon, Chatel Guyone, Chattelle Guyon. It was purpose-built as a spa town in 1817 with a new spa, theatre and casino (see Figure 5.27) added to the resort in 1900. According to the Tourist Guide: Châtel-Guyon (2006) (available only in French), Châtel-Guyon is one of the most important spa towns in the Auvergne since various royalty and celebrities, e.g. Guy de Maupassant - the famous French novelist, who paid tribute to Châtel-Guyon in
his work ‘Mont-Oriol’, have taken the waters there. It is known as the Gateway to the Volcanos, and is a stereotypical traditional spa. The brochure emphasises the grand architecture and the elegant spa parks and talks at length of the town’s former splendour but does not mention the treatments on offer. The town has a population of 6,100 over 1400 hectares, the altitude is 430 m and the climate is mild (Bonnichon nd) (see Figure 5.28).

Figure 5.27: Casino: Châtel-Guyon (Galerie du casino de Chatel-Guyon 2006) Figure 5.28: Châtel-Guyon (Bonnichon nd)

There are 12 hot springs in Châtel-Guyon with the waters regarded as highly efficacious for gruelling invasive treatments of diseases of the urinary tract, gastrointestinal disorders and gynaecologically-related conditions, such as colonic and vaginal irrigation (douches) (see Figures 5.29 and 5.30-5.33 which were taken at the Hotel Splendid with the curiste’s permission). Unusually in France Châtel-Guyon is approved for treating two conditions simultaneously (Reseau Numerique Borvo 2002a).
Figure 5.29: Châtel-Guyon Auvergne Thermale Website (Réseau Numérique Borvo 2002b)

Figure 5.30: A curiste relaxing after a rectal enema in Châtel-Guyon (Lloyd-Wright, 2003)

Figure 5.31: A Curiste receiving a Jet Douche or Blitz (Lloyd-Wright, 2003)

Figure 5.32: A curiste receiving an Affussion or Vichy Shower (Lloyd-Wright, 2003)

Figure 5.33: Hydrotherapy baths in the Splendid Hotel Châtel-Guyon (Lloyd-Wright, 2003)
There are two modes of treatment in Châtel-Guyon. First, the traditional 18-day cure and covered (wholly or partly) by social security; second, short stays not covered by state but requiring medical consultation pre-treatment at the spa. There is good cooperation between the various parties in Châtel-Guyon and the thermal institute sends relevant documentation to potential curistes.

The brochures promoting Châtel-Guyon's treatments - *Guide to Spa Treatments Available in Châtel-Guyon (2006)* (see Figure 5.34) - is available only at the tourist centre and is sent to prospective curistes after reservations have been made by the Châtel-Guyon tourist office together with a copy of the *Tourist Guide: Châtel Guyon* (see Figure 5.35). Similarly, the brochure for the Splendid Hotel Spa (see Figure 5.36) which includes the accommodation tariff for the hotel and the list of the treatments available in the hotel (see Figure 5.37) again these are sent to prospective curistes once they have reserved both their treatments and accommodation.

Treatments are carried out in three Thermal Stations: Les Grand Thermes (see Figures 5.38a and 5.38b), Les Thermes Henry (a modern building situated in the thermal park - see Figure 5.39) and Les Thermes which is integrated with the Splendid Hotel and known as the Splendid Spa Complex (see Figures 5.40).
The Splendid Spa Complex has 73 thermal bedrooms; following treatment in the complex curistes can take their meals in the Bel Ami 250-seater restaurant (see Figure 5.40b) with magnificent décor and views onto the park many of the rooms overlook the park.
The park (see Figure 5.41a) has a very simply lay-out with a tourist shopping area running the length of the walk (See Figure 5.41b), the whole area is shabby in particular the shopping area with poor quality goods for sale.

Châtel-Guyon is surrounded by beautiful countryside and has large and beautiful forests with free access to woods where fitness programmes in the open air take place. There is a large adventure park (Parc Squirrel) for young people. There are other tourist attractions available: hiking, horse riding and an arboretum. However, these features and activities are not mentioned in the brochures promoting the town.

The picture in Châtel-Guyon is predominantly one of traditional spa and cures. The town has not fully embraced the concept of remise-en-forme and is still mainly known for its traditional spa treatments. There are remise-en-forme treatments on offer for 6, 10 and 12 days marketed as *Living Health* and combining drinking the waters with hydro-mineral treatments (baths, showers and compress massage under water) performed in the thermal waters in L’Institut Bien-Être (Institute of Wellness) in the thermal park (see Figure 5.42) which was built specifically to attract new customers for remise-en-forme treatments.
The hotels in Châtel-Guyon advertise the concept but people do not come in significant numbers to the town for wellness treatments and the facilities are used to provide manicures, pedicures and facial massage for curistes on 18-day cures. There are clearly conflicting opinions as to the way forward for Châtel-Guyon. There is a push to increase the cure tourism market by developing new thermal cures for rheumatology and colon disease and there is evidence of the town dipping its feet in the water of remise-en-forme. The challenges for diversifying into remise-en-forme were explained by Monseur Pepin - the town had a stable infrastructure built around thermalism, people were comfortable with this situation and many well-paid medical professionals would be put in jeopardy were this situation to change. While they did not object to bringing in new elements, such as remise-en-forme, they saw it as an enhancement to the core business only. This position is understandable as there is a significant medical infrastructure but no real wellness infrastructure in Châtel-Guyon. Interestingly the official web site for the town (See Figure 5.43) shows people relaxing in matching robes, in reality the only opportunity for this type of reclining position post treatment is in the Splendid Spa Complex.
5.3.4 INFRASTRUCTURE

As a developed country, France enjoys a well-developed infrastructure with telecommunications, hospitals, schools, etc. The most critical infrastructural issue is that of access to the Auvergne by rail, road and air.

RAIL ACCESS: The Société Nationale des Chemins de Fer Français (SNCF) operates most of the French rail system. There are rail stations in Vichy, La Bourboule and Châtel-Guyon. Access by train from Paris is easiest to Vichy – accessing the other two spas is more difficult.

ROAD ACCESS: Vichy is north of Clermont-Ferrand and accessed from the A71 motorway from Paris to Clermont-Ferrand along the A710 and N209. Châtel-Guyon is 18 km north of Clermont Ferrand and
accessed via the E70 from the A71. La Bourboule is the most remote and difficult to reach by road as the main motorway - the A75 - is 61 km. away.

**AIRPORT:**
The Auvergne region is served by the airport at Clermont-Ferrand.

### 5.2.5 TOURISM SUPERSTRUCTURE

Vichy has a wide range of restaurants and accommodation - in total 70 hotels, 350 furnished studio apartments and 5 camping sites (Sante magazine 2008a). It also has a theatre and two casinos: Casino Elysee Palace de Vichy and Casino Grand Café de Vichy both operated by Groupe Partouche (Groupe Partouche 2006):

La Bourboule has 27 hotels which are suitable for adult curistes, e.g. the Logis De France Le Charlet with 36 rooms (see Figure 5.44), and 26 *maisons d’enfants* comprising a mixture of small hotels guest houses, gites and pensions suitable for child curistes. Typical of the hotels within the town are Les Iles Britanniques (with 30 fully-equipped studios and apartments) (see Figure 5.45), Inter-Hotel Le Parc Des Fees (built in the Belle Époque-style with 42 rooms) (see Figure 5.46).

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![Figure 5.44: Logis De France Le Charlet (La Bourboule Guide 2008)](image1)

![Figure 5.45: Les Iles Britanniques (La Bourboule Guide 2008)](image2)

![Figure 5.46: Inter-Hotel Le Parc Des Fees (La Bourboule Guide 2008)](image3)
There are 17 registered accommodation providers for child curistes who are in receipt of social sécurité, the web site for booking this accommodation is shown in Figure 5.47.

Figure 5.47: La Bourboule Maisons d’enfants Web site (Digital Network Borvo (2002a))

There are 19 restaurants in La Bourboule, one take-away and 18 small restaurants each seating about 40, e.g. Le Cyrano (see Figure 5.48).

Figure 5.48: Le Cyrano Cafe/Brasserie/Restaurant (Restaurant Le Cyrano nd)  
Figure 5.49: Hôtel de Paris (France bookings 2008)
Châtel-Guyon offers a wide variety of accommodation with 38 hotels, 400 furnished studios and 2 camping sites providing a total capacity of 900 letting bedrooms (Sante Magazine 2008b). The majority of accommodation providers belong to the Federation Regionale l'Hotellerie. Typical of the grand hotels in Châtel-Guyon is the Hôtel de Paris with 59 rooms (see Figure 5.49).

5.2.6 HUMAN RESOURCES

As noted in Section 5.1.3 the spa industry requires a vast number of staff in both cure-related jobs and those with no cure content. Whilst the number of medically-qualified staff is reduced for remise-en-forme, it still requires many of the staff categories identified in Section 5.1.3 including a significant proportion of highly qualified staff. The number of doctors and pharmacists reflects the scale of the traditional spa activity in each of the spa towns (see Table 5.1).

<table>
<thead>
<tr>
<th></th>
<th>Vichy</th>
<th>La Bourboule</th>
<th>Châtel-Guyon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thermal doctors</td>
<td>22</td>
<td>15</td>
<td>12</td>
</tr>
<tr>
<td>Pharmacists</td>
<td>28</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

Table 5.1: Numbers of thermal doctors (Sante magazine 2008a,b,c.)

5.2.7 TRAINING

Thermal spa managers are trained by the Institute National du Tourism et de l'hotellerie (INFATH). INFATH is based in Paris with facilities in Chantilly (a château 23 miles north of Paris) and has offered specific training to the thermal tourism sector since 1982 in the form of a 9-month post-graduate programme for thermalism, thalassotherapy and health/spa tourism executives. Students are given a government subsidy or salary according to their status (Studyrama 2008). In contrast, spa staff who
work in low and semi-skilled roles are trained on an on-going basis ‘in house’. The training mainly focuses on health, safety and hygiene.

Developments in Vichy (see Section 5.2.8) have resulted in the establishment of a wide range of high technology businesses based on the ‘know how’ from the spa sector which has precipitated the need for a wide range of highly-qualified staff. In response to this the Lardy University and Technology Centre opened in 2001 close to Vichy’s town centre on the Lardy Célestins site. The buildings are both modern and functional with an area of approximately 8,500 m. The total cost of the development was 76M Francs funded from the ERDF, the Conseil Général de l’Allier (Allier General Council), the Regional Council of Auvergne and the French government through Funding of the National Planning (National Fund for Regional Development).

Students are able to transfer to the Lardy University and Technology Centre from Clermont I and Clermont II Universities to study a range of new subjects based on Vichy’s industrial strength and experience in biotechnology and health, beauty/fitness, culture and tourism. These include: industrial product formulation, bio-cosmetic engineering and management of biotechnology, the design and development of nutritional and health systems and entrepreneurship. The Centre has spaces for 2,800 students and attracts around 2,000 students per year. Local industries are involved in hosting and sponsoring courses.

5.2.8 LINKS TO OTHER SECTORS

The Regional Council of Auvergne in partnership with banks and venture capital agencies has implemented a Regional Fund for Innovation to support SMEs. The aim is to support new projects in existing companies based on knowledge exploitation and
technology transfer from local research laboratories through 50 and 100% subsidies. Help is also available through the Asser Research Fellowships Programme to support entrepreneurs taking over an existing business or for business start-ups (ARDT Auvergne 2006). Criteria for programme eligibility include: employment of at least three people (including family-run enterprises that have been passed down); a minimum turnover of €250,000; that the core business involves industrial or craft production or is in Information and Communication Technologies, biotechnologies, logistics, business services or the timber industry. Service-sector businesses are examined on a case-by-case basis.

Neither La Bourboule nor Châtel-Guyon has exploited the opportunities afforded by the Regional Council of Auvergne and developed links to other sectors. In contrast, Vichy has. Whilst Vichy has been, and still is, essentially a spa town and centre for tourists. It also benefits from a good environment and internationally-famous historic spa infrastructure. Vichy has exploited these and created significant regional development opportunities with a particular focus on the health and beauty sector. Vichy is the internationally-recognised brand for skin care and cosmetics, bottled water and pastilles (see Figure 5.50). Its presence in Vichy has attracted clusters of related businesses - L'Oréal (who manufacture cosmetics), Castel (who promote mineral and hot spring waters) and Warner-Lambert who manufacture confectionery are major employers in Vichy.

Figure 5.50: Vichy skincare range (Ville de Vichy 1999b)
Vichy has established a business/industrial park dedicated to businesses in the health, beauty and biomedical sectors - Bioparc - to support the town's development (see Figure 5.51). Bioparc's mission is to promote new and existing businesses creating synergies and promoting a network of skilled specialists.

![Bioparc Business and Industrial Park Vichy](Legry 2007)

Vichy Val d'Allier Développement is the economic development agency for the region focusing on health, beauty, fitness, and biomedical businesses (Legry 2008).

### 5.2.9 FESTIVALS AND EVENTS

National events with important implications for visitor numbers include the Tour de France which goes through all three of the Auvergne spa towns under consideration. The Auvergne also hosts three major annual events, the: European Parachuting Event; French Rowing Championships; Water-ski Speed Championships.

Vichy is a major sporting destination in France and hosts a number of national and international sporting events and competitions which include: rowing, football, parachuting, water skiing competitions together with hosting stages of the Paris-Nice and French Iron Tour (Triathlon). Vichy's potential was strengthened when the conurbation was pre-selected by the Fédération Française de Rugby (French Rugby
Association) as the site of the future Centre Technique National du Rugby (National Rugby Centre). Vichy has been used as a venue for training French athletes since the Moscow Olympics Games in 1978 at the Centre National Préolympique. Vichy was also the named as the official training ground for the Football World Cup France in 1998. The Vichy Hippodrome is a horse-racing track and is regarded as one of France’s finest and most prestigious racecourses with exceptional lighting enabling evening racing. Horse-racing takes place between May and September and the Hippodrome organizes more than 40 trotting and flat racing meetings each year.

La Bourboule hosts a hallmark event – The Sancy Film Festival for Young People - organised annually in June by the Association Festival du Film pour Enfant in Le Roxy movie theatre and the casino in Le Fenestre Parc. Many curistes are children and young adolesecents so the venue is very appropriate. The festival presents an international selection of quality films and includes a book corner, an artists’ corner with workshops and exhibitions (see Figures 5.52 and 5.53).

Figure 5.52: Plein La Bobine Festival de Cinéma web-site (Equitic Technologies 2008)
Châtel-Guyon is not generally known for its festivals and events. However, each year in May the town hosts a weekend jazz festival offering street entertainment and closing with a large open concert (see Figure 5.54).

La Bourboule’s remoteness and difficulty of access cuts it out of the conference market but both Vichy and Châtel-Guyon are relatively easy to access and have identified the conference market as important. In Vichy the Opéra de Vichy Conference Centre (see Figure 5.55) was restored and renovated in 1995 to develop the conference/events
market. At the time of writing it was not possible to evaluate the centre's success as there was no information available on events or bookings.

Figure 5.55: Opéra de Vichy Conference Centre (Ville de Vichy 1999a)

In Châtel-Guyon the Mouniaude Congress Centre and Exhibition Hall is used primarily for conferences, exhibitions, marriage ceremonies and receptions and has three main facilities: a conference room for 200 people, a lecture room for 100 and a banqueting room which can cater for 170 people (see Figure 5.56).

Figure 5.56: Mouniaude Congress Centre and Exhibition Hall (Reseau Numerique Borvo 2002e)

5.2.10 COHERENT MARKETING AND PROMOTION

Four issues can be drawn out from the Auvergne case studies relating to coherent marketing and promotion and the development of a competitive health/spa tourism destination for the 21st century. First, there is the issue of regional leadership to provide coherent marketing and product development. Second, there is the issue of image re-engineering from illness to wellness that accompanies the shift from the cure to remise-en-forme. Third, the case studies accentuate the importance of devices to link the disparate communities together – e.g. the Spa Town Route. Fourth, the cases emphasise the importance of establishing an Internet presence for information
dissemination supported by e-commerce capability. These will be discussed in turn below.

REGIONAL LEADERSHIP TO PROVIDE COHERENT MARKETING AND PRODUCT DEVELOPMENT

The Auvergne has adopted a coherent approach to marketing the various elements of its spa and tourism products and is organized by four key associations which enable collaboration between key stakeholders in developing a branded image of the region’s thermalism. Three of these - Comité Régional de Développement Touristique d’Auvergne (formerly Comité du Tourisme d’Auvergne) and Federation Regionale L’hotellierie and Association Thermauvergne are described in more detail below. The fourth Thermhotel promotes hotels offering fitness breaks and remise-en-forme in the Auvergne.

Comité Régional de Développement Touristique d’Auvergne regulates the Auvergne spas and publishes an annual brochure for the Auvergne, a brochure for each spa resort and pamphlets covering the region’s smaller villages which complement the main brochures acknowledging the region’s health-giving properties and advertising additional local products, e.g. cheese and honey. The approximately 60-page brochures are a comprehensive guide to the offer at each destination in many as 20 sections, e.g. La Bourboule’s brochure. Ten of the eleven brochures are printed in only in French. Vichy’s price list, inserted at the Vichy Tourist Centre, is in three languages (German, Italian and English). The organisation also produces detailed lists of approved accommodation for curistes prescribed long thermal stays (four weeks) enabling them to choose appropriate accommodation. Approved accommodation has to meet the Comité’s quality standards and display appropriate kite marks - Qualite Auvergne approves independent hotels, Clevances approves classified furnished
accommodation (on a scale of 1 to 5 for a range of quality criteria including interior fittings and quality of ‘welcome’).

Most of the hotels in the Auvergne belong to the Federation Regionale l'Hotellerie which offers members various incentives, e.g. insurance benefits and corporate purchasing. The Federation Regionale l'Hotellerie awards a kite mark aimed at walkers - *Les Auberges de Pays d'Auvergne* - to indicate somewhere guaranteed to provide good meals and peaceful nights in a friendly atmosphere.

*Association Thermauvergne* is a spa trade association representing all ten Auvergne spa resorts as well as the doctors involved in the cure and remise-en-forme and the suppliers and manufacturers of spa materials and equipment. Association Thermauvergne organises an annual conference (usually in Paris), publishes an annual guide to the Auvergne Thermes and, since 2004, an annual magazine - *Villes d'Eaux Magazine*.

**IMAGE RE-ENGINEERING – A SHIFT FROM ILLNESS TO WELLNESS**

Auvergne’s annual tourism marketing brochure, produced by the Comité Régional de Développement Touristique d'Auvergne, is available in English, French and German and provides a single image promoting health, fitness and activity-based holidays (see Figures 5.57 and 5.58). Differences between the front covers of the 2002 and 2004 brochures are subtle but indicate a sea-change in marketing strategy. The 65-page 2002 brochure illustrates challenging, high-energy sports - hang gliding, raft racing, cycling - available year-round. Small inserts depict white water rafting and a historic castle reached by cyclists. In contrast, the 32-page 2004 brochure is more family-oriented - the image is softer with a relaxed father carrying his backpack while
protectively wrapping his arm around his child with a stunning backdrop of mountains implying space and fresh air.

The small inserts are also softer: the historic castle from 2002 is shown again but no white water rafting, groups of people sit on walls or walk leisurely, a woman dressed for carnival waves in front of a historic building, cyclists study a map; a robed woman relaxes by a pool having experienced a remise-en-forme treatment.

Tables 5.2 and 5.3 indicate the dominant images of groups of two or more people in the 2002 and 2004 Auvergne brochures of Auvergne. Both brochures emblazon the key message ‘Auvergne: A Paradise of Space’; both offer a vibrant look and feel. However, the emphasis in the later campaign has shifted from all-action to relaxation, leisurely walks and sight-seeing.
There is further evidence that the marketing strategy of the spas in Auvergne is changing (see Figure 5.59). The 24-page Auvergne Thermal Guide (2002) published by Thermauvergne in French only describes the cures available in each Station Thermal and the medical conditions precipitating doctors' referrals – treatment indications and contra-indications. The guide includes the composition, temperature and action of each water and their altitude, climate and availability. The 2004 Villes d'Eaux Magazine Auvergne again published only in French suggested that spas were
still reaching a home market but moving away from the traditional spa image (see Figure 5.60).

![Image](image.png)

Figure 5.59: Le Guide Auvergne Thermal (Association Thermauvergne, 2002)

Figure 5.60: Villes d’Eaux Magazine, Auvergne (Auvergne Thermale Developpement 2004)

Table 5.4 shows key words – relaxation, air, landscape, health, spa/thermal waters, paradise - and the number of times they are repeated. The emphasis is on wellness not ill, remise-en-forme not cure. Spa and thermal waters no longer dominate Auvergne’s message.

<table>
<thead>
<tr>
<th>REPEATED WORDS</th>
<th>NUMBER OF TIMES REPEATED</th>
</tr>
</thead>
<tbody>
<tr>
<td>RELAX/ RELAXATION</td>
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</tr>
<tr>
<td>AIR</td>
<td>10</td>
</tr>
<tr>
<td>LANDSCAPE/SCENERY</td>
<td>9</td>
</tr>
<tr>
<td>HEALTH</td>
<td>8</td>
</tr>
<tr>
<td>SPA/ THERMAL WATERS</td>
<td>7</td>
</tr>
<tr>
<td>UN-SPOILT</td>
<td>5</td>
</tr>
</tbody>
</table>

Table 5.4: Repeated Words in Villes d’Eaux Magazine Auvergne

THE SPA TOWN ROUTE

All the spa towns of the Auvergne are identified in both the 2002 and 2004 brochures and both describe a spa town route. The 2002 brochure describes exact location and treatments available to enable the tourist to easily identify his/her personal choice of spa. The description of the Spa Town Route opens by saying:
Today and yesterday ... In times gone by, visitors went to take the waters at sanctuaries dedicated to health which are now legendary. Here every Spa and mansion is a reminder of a prestigious past. You will benefit from high performance techniques and treatments, high quality accommodation and the expertise of professionals. The many leisure, sports, relaxation and cultural activities on offer will give you a taste of the holiday traditions of the grand turn-of-the-century spa towns.

(Villes d'Eaux Magazine Auvergne 2004: 3)

The 2004 brochure also includes the Spa Town Route but in this edition there is a noticeable change of emphasis the brochure states that the Auvergne is where the tourist can:

- enjoy peaceful parks, fitness centres and medical treatment of high quality, and a serene gentle atmosphere.

(Villes d'Eaux Magazine Auvergne 2004: 4)

It continues (interestingly using the past tense):

- these legendary places where famous personalities once came to take the waters.

(Villes d'Eaux Magazine Auvergne 2004: 5)

It goes on to say:

- today, visitors come to rediscover a certain style of life, a sense of well being, in a superb natural setting, full of historic interest.

(Villes d'Eaux Magazine Auvergne 2004: 5)

This is a major point clearly emphasising a shift in strategy traditional spa and cure (i.e. medical) to the promotion of wellness through remise-en-forme.
INTERNET PRESENCE AND E-COMMERCE

Web promotion of the Auvergne spas in undertaken on the Auvergne Thermale website (see Figure 5.61).

Figure 5.61: Vichy Auvergne Thermale Website (Réseau Numérique Borvo 2002f)

Figure 5.62 shows the Thalasso-thermale web-site which locates thermal, thalassotherapy and remise-en-forme spas world-wide listing the treatments available in each. The same coastal picture is used for each spa which is clearly inappropriate for inland spas in the Auvergne and would be more appropriate for coastal Saint Malo and its thalassotherapy treatments (see Section 5.3).

Figure 5.62: Thalasso thermal Web-site (Thalasso Thermale.com (nd))
Figure 5.63 shows the official website for the spas of Auvergne produced by Thermauvergne. The website gives information on all thermal spas in France and includes a description of the treatments available in each spa.

Figure 5.64: Curistes booking form (Réseau Numérique Borvo 2002h)
The thalasso thermale website (see Figure 5.65) provides a comprehensive list of thalassotherapy, balneotherapy and thermal treatment centres in France and lists treatments available in each centre. The site does not allow booking online.

Figure 5.65: Thalasso Thermal web-site (Thalasso, Cure thermale nd)

Figure 5.66 shows a web-site Health/Wellbeing Holidays in France which promotes the Auvergne as the most important region for hydrotherapy treatment in France and indeed Europe with the ten Auvergne resorts welcoming nearly 70,000 curistes annually (Brand Fuel nd,a). The site has four drop-down features (What can I do? Where can I go? When can I go? Where can I stay?) offering a full menu of activities. The ‘Auvergne’ option provides information on a range of activities including hydrotherapy.

Figure 5.66: Health/Wellbeing Holidays web-site (Brand Fuel nd, b)
5.2.11 BRANDING

There are two internationally-recognised branded products sourced and produced in the Auvergne - Vichy skincare products and Volvic natural spring water (see Figure 5.67) which is bottled at source for distribution globally.

Figure 5.67: Volvic (Volvic Natural Spring Water 2007)

Vichy is synonymous with the brand name and production of a range of skin care products that have a premier position in the European market. Vichy Cosmetic Products and Vichy Skin Care products are produced in laboratories in Vichy. Vichy pastilles (or lozenges) which are made from Vichy water and Vichy mineral water are all recognised international brand names. Figure 5.68 shows a Vichy range of skin care products and Figure 5.69 shows an advert for the town which is a bottle of Vichy mineral water displaying a range of the town's commercial activities.

Figure 5.68: Vichy Laboratories Products (Ville de Vichy 1999b)  Figure 5.69: Advert for Vichy’s range of commercial activities (Ville de Vichy 1999b)
National recognition of the economic importance of spas has driven international branding to align regional produce with the spa concept under the *Products of the Auvergne* label (see Figure 5.70).

![Brochure for Auvergne Produce (2003)](image)

La Bourboule's local produce includes preserves, liqueurs, honey, bonbons (sugar coated almonds) which are identified as *produits régionaux*. The issue of provenance is becoming increasingly important in differentiating regions and creating a Sense of Place. Sourcing of local products by hotels and restaurants increases the linkage of the tourism industry to other sectors and reduces leakage, enhancing the economic benefits of tourism to a region. The official Massif du Sancy web-site (see Figure 5.71) shows all of the activities of La Bourboule and the ten communes in the Sancy region, including the Thermes. It identifies local specialities and is aimed at general tourists not curistes. However the text is in French only and does not translate into English despite a translation option being available on the website.
Châtel-Guyon has no internationally-recognised branded products and has not managed to promote its local produce as effectively as Vichy or La Bourboule.

5.2.12 SUMMARY

The Auvergne is a large rural area with a low population density and a long spa tradition dating back to Roman times. The Auvergne today focuses on the provision of cures for a range of medical conditions in its pattern-book spas developed in the 18th and 19th centuries. The cures involve the drinking of the waters and the administration of a range of gruelling and often invasive treatments. Until fairly recently the Auvergne spas have been sustained by referrals from French GPs with financial support from the state for its standard 18-day cures. Ageing demographics and a shift in lifestyles has challenged the sustainability of the Auvergne spas. The challenge for their future
viability is the extent to which the spas can diversify to develop new products and to attract new market segments.

The Auvergne has adopted a coherent approach to regional marketing led by four key associations. The Comité Régional de Développement Touristique d'Auvergne leads the general promotion of the tourism offer through the production of an annual Auvergne brochure, the brochures for the individual spa town and the complementary pamphlets for the small villages across the area. The Federation Regionale L'hotellierie coordinates the regional accommodation offer providing a kite mark and quality standards for accommodation products. Thermhotel specifically focuses on the promotion of hotels providing remise-en-forme and wellness packages. Association Thermauvergne coordinates the spa offer and its multiplicity of stakeholders.

Comité Régional de Développement Touristique d'Auvergne has been primarily responsible for reengineering the image of the Auvergne from illness to wellness through decreasing the emphasis on cure and increasing the emphasis on remise-en-forme. This has enabled the linking of a wider range of products to the core spa offer thus diversifying the market.

Vichy is internationally recognised for its branded name for cosmetics and beauty products. Despite being a purpose-built traditional spa, Vichy today is attempting to create a positive modern image which will enable both the regeneration of the city itself and its ailing traditional spa. In Vichy diversification has resulted in a shift from traditional spa to remise-en-forme and capitalization of it's 'know how' through a range of knowledge exploitation and technology transfer activities linked particularly to the health and beauty industry through the Bioparc Business and Industrial Park. Vichy has developed a range of qualifications to support its businesses thus sustaining the
town in the twenty-first century. In addition to branding products based on its water, Vichy has also diversified the use of its extensive accommodation through a focus on the conference and convention trade. As the traditional spa trade declines Vichy is developing short-health stays focusing on sport and other out-door pursuits and language acquisition incorporating its de-stressing remise-en-forme programmes.

In La Bourboule diversification has led to development of outdoor pursuits particularly in summer through a focus on mountain biking and to some addressing of the seasonality through the development of winter activities based on skiing and snowboarding. Investment in appropriate superstructure – e.g. the development of appropriately-heated buildings for winter usage would seem to be a major constraint for La Bourboule in exploiting the full potential. Like Vichy, La Bourboule is a good example of a traditional spa town which is committed to using its thermal waters as an exploitable resource and ensuring ongoing sustainability by putting itself at the sharp edge of traditional spa treatments with it newly-built traditional spa - Les Thermes Choussy – by reinventing itself through remise-en-forme and through the development of a diverse range of outdoor pursuits.

The picture in Châtel-Guyon is much bleaker. To date the town has been much more conservative and does not seem to have identified a diversified and competitive economic development strategy. It has resisted change and seems to have been lulled into a false sense of security through an over-dependence on spa loyalty from its ageing clientele. Apart from the development of conference activities the town had not capitalized on its relatively easy access. Its meager attempts to shift to remise-en-forme through the L’Institut Bien-Être have been integrated into supporting the declining cure market rather than attracting new market segments.
While there are shortcomings in each of the Auvergne case studies, the lessons from the Auvergne for a declining spa region seeking to become a competitive health/spa tourism destination seem very clear.

- Understand the comparative advantage and potential of the region.
- Be realistic about infrastructural constraints, e.g. access.
- Develop the tourism superstructure to support the tourism product.
- Invest in training strategies to develop the human resource and ensure high service quality.
- Exploit comparative advantage and create links to other sectors through diversification activities which complement the core product and resonate with modern lifestyles and target clear market segments, e.g. sport tourism, language tourism and conference tourism. Develop a Sense of Place through the promotion of local produce that promotes their provenance and their uniqueness, e.g. food and drink, local arts and crafts.
- Develop a schedule of local, regional, national and international festivals and events to attract visitors.
- Identify lead stakeholders for the promotion of the key elements of the tourism product – activities, accommodation and food and beverage.
- Develop a stratified marketing strategy with regional coherence that allows differentiation of the individual destination elements. Develop an e-marketing and e-commerce strategy that exploits the full potential of the Internet and enables communication of information to potential visitors and clinches the deal. Address linguistic issues by matching the language of promotional materials to target markets.
- Build on awareness of internationally-branded products through co-branding activities.
5.3 SAINT MALO

5.3.1 COMPARATIVE ADVANTAGE

The city of Saint Malo has been selected as a case study on the basis of its success as a traditional thalassotherapy and thalassolesisure tourist centre. The city is situated in North-west France on the English Channel and gets its name from a Welsh monk named Mac Low. It is a walled city which was the leading port for merchant vessels in France and a target for pirates. The walls and defences were strengthened by Louis XIV King of France (1643-1715) as a deterrent to English invaders. The city has consistently been influenced by its peninsular location jutting out to sea at the mouth of the river Rance (see Figure 5.72).

When France declined as a colonial power many of its lucrative markets were lost and Saint Malo's fortunes declined. This was exacerbated by the harbour not being a deep-water harbour and and boats becoming stranded when the tide turned. The city's fortunes changed when British travellers came to Brittany as part of the Grand Tour, originally an extended cultural tour of Europe taken by wealthy young Englishmen as part of their education. Other wealthy British visitors were attracted to the region on medical grounds having discovered the benefits of drinking and bathing in sea-water and eating sea-food. Additionally many Britons came to visit relatives in nearby Dinard - home to many British soldiers who were imprisoned with their families during the
Napoleonic wars (1792-1815) and stayed on after the war ended. Prominent Europeans and Americans also moved to the town building major villas in response to this new-found wealth many hotels and shops were built in Dinard and its surrounding towns. Saint Malo's first hotel opened in 1858 and twenty-six more followed in the next five years along with enhanced infrastructure in the shape of roads, a casino, pavilions, three golf courses and the first tennis court in France.

During World War I the holiday-makers left and the hotels were turned into hospitals. Post-war, normality returned until the stock-market crash of 1929 and the Great Depression (1929-1933). The region suffered another change in fortune when working class British people began coming to Brittany following the introduction of paid vacations in 1936. As a direct result the wealthy patrons and owners moved on to the more distant Riviera. World War II brought further economic hardship to Saint Malo following American bombardment in August 1944 which destroyed 80% of the city (Angelfire nd).

By 1960 Saint Malo was re-built with great effort and expense to maintain its historic architectural accuracy. Although the development was not without its critics the reconstruction efforts were rewarded by the region becoming a major port city and a major conference and tourism centre. The city has 52,737 inhabitants (1999 census) increasing to 200,000 during the summer (Ville de St Malo 2008a).

Saint Malo has become a year-round destination attracting more than 2 million tourists (2003) by offering a range of events, e.g. yacht races, festivals and concerts. Recently, the city has focused on tourist packages based on modern interpretations of thalassotherapy and thalassoleisure. The town is in a prime location for exploiting the sea-water from the English Channel for thalassoleisure activities to drive the local
economy forward. It has the added advantage of a micro-climate being warmed by the Gulf Stream.

Saint Malo is still a centre for traditional thalassotherapy spa treatments but most of the treatments are badged as short-stay breaks under the global concept of ‘sea-water spa’ which are performed in luxury thalassotherapy establishments which are entirely dedicated to wellness. There is evidence of increased and new investment to accommodate the rising numbers of people requiring the all-year-round breaks the city offers. There are three new thalasso therapy treatment centres being built in the city, the sites fulfil the location requirement which is to be situated near the sea Figure 5.73 and Figure 5.74 shows the construction site of the Reine Marine thalassotherapy treatment centre.

Figure 5.73: Reine Marine thalassotherapy centre under construction (Lloyd-Wright 2004)  Figure 5.74: Reine Marine – the proposed centre (Lloyd Wright 2004)

These new builds are an indicator of Saint Malo’s confidence in its wellness and fitness policy of increased remise-en-forme as a mechanism for inward investment to the region.
5.3.2 INFRASTRUCTURE

The city has a railway station in Jean Coquelin Square operating trains to Rennes and Dinan. A high-speed train service connects to Paris in just 3 hours. There is a toll-free dual carriageway from Saint Malo to the N137 and main French road network enabling travel to Paris in around 3.5 hrs. Ferries from Saint Malo connect to the Channel Islands and Portsmouth.

5.3.3 TOURISM SUPERSTRUCTURE

There are 9078 hotel bedrooms, 34107 letting beds and 19,986 camping spaces available in Saint Malo (Ville de St Malo 2008a). The hotels in Saint Malo were purpose-built in similar style to those in the Auvergne. Typical of this type of establishment is the four-star Le Grande Hotel des Thermes (see Figure 5.75).

All the resident curistes have free access to the facilities of the Thermes Marins, a centre renowned for its wide-range of sea-treatments and services dedicated to health, fitness and beauty. The facilities include: a fitness club; six sea-water swimming pools; 80 cabins for individual spa treatments; beauty and hairdressing salons. The traditional thalassotherapy spa treatments include: hydro massage, physiotherapy and seaweed wraps and use of an aqua-tonic maze and an aqua tonic gym. The remise-en-forme treatments include: facial treatments, slimming treatments, pedicures, manicures and reflexology.
Le Grande Hotel des Thermes (see Figure 5.76) is a good example of the Saint Malo hotel product providing a complete range of thalassotherapy packages. First, thalassotherapy cures funded by the French sociale securité with accommodation in Neptunia Residence Hoteliere – 26 purpose-built rented curiste apartments (see Figure 5.79). Second, self-funded (or partially-funded) treatments while residing in the 80 dedicated curiste bedrooms in the hotel. Figure 5.77 shows a curiste walking from Neptunia Residence Hoteliere to the curistes entrance of the Grande Hotel des Thermes shown in Figure 5.78. Third, short weekend breaks specifically targeted for working people.

Le Grande Hotel des Thermes together with the Thermes Marins has developed a range of 'stay' packages to 'take a break from the monotony of day-to-day life'. ‘Health stays’ incorporate traditional thalassotherapy cures for rheumatism and circulatory deficiencies and requires examination by a registered doctor who prescribes a personal treatment plan and provides regular check-ups (see Figure 5.80).
Slimness stays allow client to select from a limited programme of treatments including associated aesthetic care (skin care using beauty local products), physical activities and thalassotherapy treatments (see Figure 5.81). Well-being stays provide relaxation to improve physical, mental balance and bring about well-being through thalassotherapy treatments, aesthetics, personal grooming, hygiene and lifestyle techniques (see Figure 5.82): Short stays - Escapade Gastronomie - are weekend packages including a high standard of cuisine (see Figure 5.83): The weekend packages are increasingly popular and in 2006 the Thermes Marins entertained 78,363 visitors (Ville de St Malo 2008a).

There are 54 restaurants in Saint Malo - most with 40-plus covers typical of these is A La Duchesse Anne Restaurant (see Figure 5.84).
5.3.4 HUMAN RESOURCES

There are four general practitioners of medicine in Saint Malo, one physiotherapist, eleven kinésotherapists, thirty five hydrothérapists and one dietician registered as employed in the thalassotherapy industry in Saint Malo (Sante magazine 2008c).

5.3.5 TRAINING

Training for the thalassotherapy industry is structured as follows: the managers of the thalassotherapy hotels are selected by the various companies that own the hotels, e.g. the Accor Group. Low and semi-skilled support staff are trained in-house whereas thalassotherapy staff are selected on the basis of the treatments provided by the establishment. Marine hydrotherapy is divided into several different types: Hydro massage for relaxation; Manual hydro massage and Hydro-massage - exercise in a swimming pool.

To support these treatments a range of specialists are required including: masseurs, hydro- therapists, beauty therapists, physiotherapists, hairdressers, doctors, specialist hydro-therapy cleaning staff and receptionists. Specialist training is available at Le Spa Saint Malo training centre where Phytomer beauty products are developed and manufactured. Phytomer is a global brand with a presence in 70 countries and approximately 7,000 authorised selling-agents internationally. Le Spa Saint Malo is recognised as a Phytomer product training centre which has trained some 10,000 beauty professionals (see Figure 5.85a). Le Spa Saint Malo is also an active beauty salon which takes local appointments and offers clients Phytomer natural beauty products and treatments (see Figure 5.85b).
Hairdressers who work in Saint Malo are mostly trained as apprentices locally. The manufacturers of the equipment used in the thalassotherapy establishments give in-house training following installation.

5.3.6 LINKS TO OTHER SECTORS

There is a strong agriculture and farm-produce industry in Saint Malo which also has a range of nautical services to support the tourism superstructure of the city for example, shipyards, engine-manufacturers, sail-makers, fitting-suppliers and diving-experts. While Saint Malo is capitalising on the use of the sea-water for its burgeoning but relatively new thalassotherapy and thalassoleisure industry, the city has a much longer history of sustaining its economic stability through its commercial harbour. During the year 2006 an estimated 2.2 million tons of good were exchanged in the harbour, as 2,000 boats were moored in the two marinas in the city while 8,600 stops of passengers were recorded on the maritime route from the city to England, the Channel Islands, Ireland and the Breton Coast (Ville de St Malo 2008a). The following shows the three ports in Saint Malo and their various uses. First, Figure 5.86 the Marina Saint Malo which can accommodate up to 2,000 boats at any one time. Figure 5.87 shows the commercial port which handles over a million tourists annually and is the leading French port for importing granite, wood, fertilisers, salt, live-stock feed and paper.
Exports mainly revolve around car and food-processing industries (Ville de St Malo 2008a).

Third, is the fishing port of Saint Malo (Cancale) (see Figure 5.88) which is one of the main fishing ports in Brittany netting some 4,000 tonnes of fish annually. Sailing and motor boats can be rented from the port which is a point of departure for divers who are transported on organised trips to recognised diving sites off the sunken ships in the bay (Saint Malo The Port 2006).

CENTRE D’ANIMATION DE LA VALLÉE

The Centre d’Animation of the Valley is a language centre for English and Spanish. The centre offers various cultural activities, exhibitions and performances. The centre has traditional music workshops, computer graphics and carpentry workshops (See Figure 5.89).
### 5.3.7 FESTIVALS AND EVENTS

There are numerous festivals and events in Saint Malo - many associated with its marine heritage, including: Route du Rhum–La Banque Postale (a famous transatlantic boat race scheduled next in 2010); the Tall Ship Races (last held in 2006); the Quebec-Saint Malo Transatlantic Race (for July 2008). Not associated with the sea is the Tour de France which passes through Saint Malo. The major festivals and events held in the city are listed below.

<table>
<thead>
<tr>
<th>FESTIVAL/EVENT</th>
<th>TIME</th>
<th>LOCATION</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flower Market Festival</td>
<td>May</td>
<td>Courtyard of Saint Malo castle</td>
<td>Flower show (see Figure 5.90)</td>
</tr>
<tr>
<td>World Folklores Festival</td>
<td>May</td>
<td>Various</td>
<td>A major festival with music and dancing from around the world (see Figure 5.91)</td>
</tr>
<tr>
<td>Étonnants Voyageurs (Amazing Travellers) Festival</td>
<td>July</td>
<td>Various</td>
<td>International literary event started in 1990 by Michel Lebris (a writer and philosopher) and René Couanau (the Mayor) (see Figure 5.92)</td>
</tr>
<tr>
<td>Painting Solidor</td>
<td>Weekends through summer</td>
<td>Solidor Tower</td>
<td>Amateur and professional art competition (see Figure 5.93)</td>
</tr>
<tr>
<td>The Chlorophyll Walk or The Chlo</td>
<td>May</td>
<td>Visits to various sites (ponds, a sewage-water station, beaches and municipal green-houses)</td>
<td>Walk involving about 1000 participants (see Figure 5.94)</td>
</tr>
<tr>
<td>Sacred Music Festival</td>
<td>Summer</td>
<td>Cathedral of Saint Malo</td>
<td>Concerts and singing competitions (see Figure 5.95)</td>
</tr>
<tr>
<td>Literary and musical walks.</td>
<td>Summer</td>
<td>International House of Poets.</td>
<td>Walks are led by story-tellers around the old walls of the city (see Figure 5.94)</td>
</tr>
<tr>
<td>La Route du Rock Festival</td>
<td>August</td>
<td>Saint-Père fort</td>
<td>Open-air concerts attracting more than 20,000 people from all over Europe (see Figure 5.95)</td>
</tr>
<tr>
<td>Quai Des Bulles Comic Strip Festival</td>
<td>October</td>
<td>Palais du Grand Large</td>
<td>A festival demonstrating the most recent techniques for fixed or animated images. (See Figure 5.96)</td>
</tr>
</tbody>
</table>

![Figure 5.90](image1.png)

![Figure 5.91](image2.png)

![Figure 5.92](image3.png)

![Figure 5.93](image4.png)

![Figure 5.94](image5.png)

![Figure 5.95](image6.png)

![Figure 5.96](image7.png)
Saint Malo has not ignored the conference scene. The Palais du Grand Large Conference Centre is situated in the centre of Saint Malo and specializes in large conferences seating up to 1,000 people. (See Figure 5.99)
5.3.8 COHERENT MARKETING AND PROMOTION

The two key marketing factors of Saint Malo both rely on sea-water: first, the fishing harbour and ferry port; second, the road to wellness and fitness through thalassotherapy and thalassoleisure. There are two locally-produced brochures. First (see Figure 5.100) the Thermes Marin Saint Malo brochure (2006) promotes thalassotherapy and thalassoleisure treatments in the city.

Second (see Figure 5.119) shows tourists walking the ramparts of Saint Malo proclaims the aims a ‘breath of fresh air’ and in just a few days visitors will be ‘back on form and feeling relaxed’ – a transformation only requiring ‘a comfortable pair of walking shoes, a small backpack, a bottle of water and the visitor’s own personal effects’. The brochure offers some ideas for walks in and around the city. The brochures are complementary and helpful to the visitor who is likely to view the destination as an ideal holiday for those who want to get back into active leisure activities and wellness while discovering the city’s scenery and heritage.

Figure 5.100: Saint Malo Thalassotherapy Brochure (2006)

Figure 5.101: Pamphlet showing tourists walking the ramparts of Saint Malo (2006)
The pamphlets for Phytomer La Spa reinforce this view showing a treatment room pronouncing ‘a haven of well-being beside the sea - a source of energy and serenity’ (see Figure: 5.102).

![Figure 5.102: Pamphlet for Phytomer La Spa](image)

A range of organised outdoor activities are available locally, e.g. horse-riding and cycling. However, these activities are not coherently advertised and are sometimes difficult to locate. In contrast Thermes Marins de Saint Malo is a comprehensive web-site providing pre-booking information including prices. Application on-line is followed up by a call from an agent to complete the booking and to register the details (see Figure: 5.103).

![Figure 5.103: Thermes Marins Reservations web-site (SA Thermes marins GRI (2006))](image)
Two other web-sites provide information on thalassotherapy treatments available in Saint Malo: Thalassothermale.com (see Figure 5.104) and Sante Magazine (Figure 5.105).

5.3.9 BRANDING

PHYTOMER MARINE COSMETICS PRODUCTION COMPANY

The town has been developing its bio-marine industry in cosmetics and technology over time and as a result the Phytomer Marine Cosmetics Production Company was
founded in 1971 in Saint Malo. Phytomer is a pioneer brand and world-wide specialist in marine cosmetics using the marine active agents of sea-water and seaweed, these products are for use on the face and body. Since 1999 the products have been available in cosmetic shops and department stores, prior to this the products were exclusively available in beauty salons and spas. Today (2008) the company still has its headquarters in Saint Malo. Figure 5.106 shows the reception building to the Phytomer Marine Cosmetics Production Company.

![Figure 5.106: Phytomer Marine Cosmetics Production Company: Saint Malo (Lloyd-Wright 2004)](image1)

![Figure 5.107: Phytomer Display of Range of Products (Lloyd-Wright 2004)](image2)

![Figure 5.108: View from Phytomer Production Company Reception: Phytomer Le Spa (Lloyd-Wright 2004)](image3)

The Phytomer laboratory in Saint Malo employs 20 scientists, who have researched, developed and patented locally-produced marine skin-care and cosmetic products. Figure 5.107 shows a range of products from their formulas displayed in the reception area of the factory on Saint Malo. In this way, the integrated production facility enables the company to have control of the product development process from raw materials to finished product. Opposite the Phytomer Production Company is Le Spa which is also owned by Phytomer and provides product and treatment training. Figure 5.108 is a picture taken from the Phytomer Production Company and shows the close proximity of Phytomer Le Spa. The town is renowned as a centre for thalassotherapy but has not developed a coherent branded image for any of these products or services. Saint Malo
has, however, joined with other towns on the Brittany coast creating two separate outlets for regional products. First there are permanent outlets known as *Produits Regionaux* which sell a wide variety of products, e.g. biscuits, cheese, honey, wine, tea-towels, pottery and Phytomer products (see Figure 5.109). Second is the *Marche de Produits Regionaux* a weekly market selling local produce (see Figure 5.110).

![Figure 5.109: Produits Regionaux Saint Malo (Lloyd-Wright 2004)](image1)

![Figure 5.110: Marche de Produits Regionaux Saint Malo (Lloyd-Wright 2004)](image2)

### 5.4 DISCUSSION

The case studies of the Auvergne region of France and the city of Saint Malo show them to be good examples of exploiting health/spa tourism as a driver for economic development. The key question is whether the features and attributes revealed in the audit are transferable and, if so, whether they could be used to develop health/spa tourism in Powys. On the face of it, the Auvergne shares two key characteristics with Powys: first, similar geography (spacious, unspoilt, diverse areas of green open spaces dotted with lakes and forests); second, the same EU status for rural development.

In looking at the offer in these two exemplars, the thermal spa resorts of the Auvergne and the marine spa resort of Saint Malo are concerned with three main areas of health spa tourism:
- Thermal and thalassotherapy cure treatments used to treat medical conditions, diseases, and disorders of the body.
- Thalassotherapy and remise-en-forme programmes for relaxation, beauty therapy, general recovery and recuperation.
- Thalassoleisure programmes for preventative purposes, lifestyle, exercise and sporting activities.

Critically, the traditional thermal cure treatments practiced in the Auvergne spas are dependent on continued French government financial support in giving direct financial support to curistes. At the time of writing, such support looks to be set fair to continue, but the policy could change in the future if, for instance, the efficacy of the treatments were challenged, or the French health spending were to alter its emphasis with successive governments. Vichy and La Bourboule have anticipated such a scenario by actively demonstrating a willingness to increase the activities associated with remise-en-forme, as in the Les Célestins Spa and Fitness complex in Vichy. In La Bouboule, the town has demolished redundant spa buildings and developed a new biking centre and a new remise-en-forme centre - La Residence Thermale Choissy - thus enabling the town to attract people who want a holiday associated with wellness, relaxation with beauty and holistic therapy treatments. In contrast, Châtel-Guyon has a new development – L’Institut Bien-Être - a purpose-built wellness centre dedicated to remise-en-forme, but only offering these treatments to resident, traditional curistes. Châtel-Guyon is at this time seeking to continue its strong links to the traditional cure treatments by developing new thermal treatments to treat chronic illnesses with thermal waters found in the town. The conclusion must be that there is no anticipation that the current regime of funding will change, although the new facilities will enable a switch to a more generic, commercial venture should that not be the case in the long-run.
Saint Malo shares the same spa cure history with the Auvergne, but through the use of sea rather than thermal waters. It differs from the spa towns of the Auvergne in that it was not a purpose-built spa town and did not rely on locally-developed thalassotherapy cures to sustain it economically. Its location has ensured that it has always enjoyed a naturally lucrative commercial superstructure and has always made a good living from its natural marine-resources e.g. developing prosperous ports and harbours for a wide-range of maritime activities. Further, this resourcefulness continues in the 21st century where unique and modern techniques have been developed in the city harnessing the natural resources of the sea to produce Phytomer skin-care and cosmetic products. It shares this feature with Vichy, which likewise has internationally-branded world-famous cosmetics, where the industry has grown through reputation although the efficacy of some of the products is open to question. Both of these cities have enjoyed a further economic benefit from these developments that also enhances their reputation in so much as both companies have training schools for their products attracting students world-wide.

The French spa towns of Vichy and Saint Malo have a sound infrastructure with excellent road, rail and air links. La Bourboule and Châtel-Guyon are rural communities with rail access, but more remote access to motorway links. The tourism superstructure in all of the destinations boasts a full range of accommodation types from grand hotels to camping sites, but only Vichy and Saint Malo can really claim to be all-year-round destinations. La Bourboule is well placed to provide first-class winter sport activities as the town has cable cars linked to a newly-established mountain biking-centre and cross-country networks of circular pistes. The main problem for La Bourboule and Châtel-Guyon is the rural location and this difficulty leads to the spa centres being closed during the winter months. Much of the accommodation in La Bourboule and Châtel-Guyon is boarded up for the winter months (historically they
have never had appropriate heating systems and it is doubtful that the current financial model for the spas would release sufficient capital to up-grade the premises – regardless of any market research that would suggest that a winter market may exist). The spas re-open from spring until early autumn and staff are employed on that basis, This is not a problem for Vichy who offer remise-en-forme fitness packages and Saint Malo who have developed wellness and wellbeing ‘stays‘ which are available throughout the year.

All of the spa towns have a wide range of visitor attractions, the larger population resorts of Vichy and Saint Malo not unsurprisingly have more elaborate facilities for the visitor to enjoy, for example: horse-racing tracks, exhibition/conference centres and golf courses. However, a common feature in all four resorts was impressive 19th century architecture, casinos, theatres, pavilions and hotels and grand tree-lined avenues for promenading. The level of activities in the main also corresponded with the size and location of the resort e.g. in Vichy EU matched funding supported the development of Bioparc business and industrial park, Cavilam language centre, the International Omnisports Park and the Centre International de Sejour. It is no coincidence that the sites are within easy distance of good air, road and rail links and were developed in the light of the success of the Le Célestins Spa and Fitness Hotel Complex where the combination of EU funding, private investment and public commitment has ensured the initial capital build and a viable future. Vichy has shown how to be successful in government sponsored private/public partnership developments and to meet the EU rural programme criteria which is aimed at producing innovative outcomes by favouring the rediscovery of heterogeneity.

There is government help from the Economic and Social Development Fund (FDES) available for would-be investors in new spa developments by means of low-interest
loans. In Saint Malo, there is evidence of new investment in thalassotherapy centres under construction, and these new builds indicate that the city has confidence in a wellness and fitness policy of increased remise-en-forme type programmes as a mechanism for inward investment to the region. There has been new investment in a fast train service which links the city directly to Paris in under 3hrs and also new investment in Les Thermes de Marins thalassotherapy and thalasso-leisure centre which, like the Vichy spas, offers short breaks for busy people who want to come to these resorts to de-stress and be pampered another exemplar of the move away from a thermal cure to treat a chronic disease. The smaller spa resorts have also had moderate success in private and public funded capital projects intended to complement the traditional thermal cure. However, as discussed earlier, they have been less successful to date in turning these projects into all-year round successes. La Bourboule has increased its opportunities for all-year-round health/spa tourism by supporting and developing new initiatives for year-round outdoor activities to promote and accommodate fitness, wellness and leisure activities by exploiting the natural countryside resource.

Unlike the remise-en forme and beauty therapy industry, the thermal spa sector industry is labour-intensive and low-skilled (e.g. toilet cleaning, sterilizing equipment, general cleaning) due to governing health and safety requirements laid down by the French Government and Thermavergne, thermal spa sector workers are also mostly part-time and seasonal. Thermal spa managers in the Auvergne receive financial government assistance with training by INFATH. During the winter months, when the smaller spas close for the winter, the manager will often return to INFATH for further updated training or they may be given other employment (often in the city) for parts of the winter months. The doctors mostly reside permanently in the spas and have duties
involving the running and upkeep of the spa clinics and preparation for the coming season.

All of the spa resorts in the Auvergne and in Saint Malo are in regions with a strong agriculture and farm produce industry. This is reflected in the Produits Regionaux markets which are available throughout the rural areas of France where visitors and local people enjoy a selection of fresh produce which has been locally sourced as well as having the opportunity to buy products which have been locally developed and manufactured.

The spa resorts have a wide-range of festivals and events which mostly take place in the summer months with three National events, two of which take place in Saint Malo: the Tall Ship Races and La Route de Rock. However, all of the spa towns are closely involved with the biggest branded national event, the Tour de France held in July each year.

The Auvergne markets a spa trail, not just highlighting the individual features of each spa town, but also a regional identity based on traditional thermal spa treatments. The policies for marketing the Auvergne are purposeful and focussed: the content of promotional brochures and pamphlets is governed by three associations who cooperate and produce comprehensive, coherent material that seeks to complement rather than compete between centres. All of the pamphlets and brochures in the Auvergne spa towns and Saint Malo were first and foremost branded with a healthy image, i.e. a healthy environment: mountains, green landscape, oceans, sea-scape, places where people can be cured, recover from illness, get fit, relax, un-wind - be pampered. The thermal spa brochures contain comprehensive details of the spa including: treatments, prices, amenities and facilities in the spa. All curistes are given
a further comprehensive brochure containing registered and approved accommodation together with a current price-list. The advertising material promoting remise-en-forme does not conflict with the traditional spa message of cures for chronic illness; rather chronic illness cure is positive and shown to be promoting wellness and an opportunity to get back into shape in a 'healthy' spa environment. None of the material demonstrates any conflict between centres, but rather a promotion of coalescence of purpose. The material does not mention the illness tradition of the spas, but rather focuses on the healthy, invigorating, environmental location of the spas and the opportunities that these locations will give for people to get back into [good] shape. The material also shows the long-term benefits of purchasing the branded skin care range. The product brochures are likewise predominantly health-orientated with health-giving: pictures of honey, cheese and fresh farm produce and details of where and when they would be available. The Health Stay, Slimness Stay, Well Being Stay and Short Stay breaks are health/spa tourism holidays that are becoming synonymous with the spas of rural France; they are advertised as coherent packages and can be accessed, like the thermal treatments, on-line.

Examples of branded products sourced and produced in these towns are: Volvic mineral water, Vichy mineral water, Vichy skin care and cosmetics. There is an opportunity for further branding with Phytomer skin care and cosmetics made from locally-sourced sea-weed at Saint Malo.

5.5 CONCLUSIONS
Holistically, the French case studies support the appropriateness of the theoretical framework for a competitive health/spa tourism destination although individually they have strengths and weaknesses. At one level the use of the French spas as an
appropriate comparator for UK spas since France enjoys a health service that maintains subsidies for French people to participate in spa might be criticised. However, even with such subsidies, the French spa market is declining as people do not want to commit several weeks to receiving spa treatments and the French spas are being forced to reconsider their focus. Thus, there is an imperative for the French spas to shift their business models and treatment ranges to ones that fit the modern spa market. Whilst the vast majority of health/spa tourism in France remains dedicated to the traditional spa therapy market, some spa towns have managed to move on. Amongst the French spas studied, those that have made the paradigm shift to remise-en-forme and thalassotherapy, e.g. Vichy, La Bourboule and Saint Malo, would seem to have a brighter future than those that have not, notable Châtel-Guyon. This is good news for the UK, and Powys, since there are limited trained personnel in traditional spa cures but a wealth of trained personnel in remise-en-forme.

Branding, the use of regional quality marks and a coherent marketing strategy that effectively exploits the Internet are critical aspects of success. A strong brand, as seen in Vichy, can provide the basis for a plethora of spa-related products and links between the tourism industry and manufacturing industry. The Vichy case emphasises the importance of knowledge exploitation and technology transfer in regeneration activities.

Chapter six develops a case study of the new (2003) Bath Spa Millennium Project and shows how the bid was conceived and managed by key stakeholders.
CHAPTER 6

CASE STUDY:
BATH MILLENNIUM SPA

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6.1.1 STAKEHOLDER ATTEMPTS TO RESTORE A. WORKING SPA IN BATH
6.2 B&NES, WORKING IN PARTNERSHIP
6.3 BATH SPA MILLENNIUM COMMISSION PROJECT
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CASE STUDY: BATH MILLENNIUM SPA

6.0 INTRODUCTION

The Bath Spa Millennium Commission Project (the BSM Project) has been selected as a case study as it is probably the best example in the UK of using spa as the focus for an economic development and regeneration project. This study proposes the regeneration of an area for spa towns in Powys. To achieve such regeneration a major stakeholder in any such scheme would be the local authority - in the case of Powys this would be PCC. The Bath project is, on this basis, of great intrinsic interest since it set out the following success criterion in the original prospectus for the BSM project:

[to] demonstrate [that] the local authority can lead through partnership and implement challenging sensitive and exciting projects where private sector initiatives have successively failed

(Bath & North East Somerset Council 2000)

This success criterion is valuable as an exemplar for other local authorities, such as PCC, which, may wish to adopt the development of a similar project.

The BSM project is the most recent major spa development in the UK. Bath and North East Somerset Council (B&NES), the local authority governing the City of Bath, was successful in securing part funding for the project from the Lottery and Millennium Commission (MC). The bidding criterion for such funding requires all parties to work in partnership. The BSM project case study focuses on key stakeholders involved to show how they work together as a partnership to secure funding for a major project. The study considers whether the BSM project team of B&NES were successful in
achieving the objectives of the project, as set out in the original prospectus of working in partnership with key stakeholders:

Section 6.1 looks at the history of the City of Bath as a working spa, its subsequent decline and the various attempts made at regeneration over time. It concludes with a report of the findings and inferences drawn from interviews held with key BSM project managers, who were officers of B&NES. Sections 6.2 and 6.3 looks at the logistics of setting up a major project, and the pre-determined 'success criteria' set by B&NES and, in particular, focuses on the local authority role in the development of the project. It then uses stakeholder theory as the basis for the analysis of the latest project to use the waters of Bath for their original purposes and considers the BSM project as a particularly relevant example of a public-led and funded private-public partnership. Section 6.7 moves on to investigate the potential transferability of the project approach to using health/spa tourism as a unifying framework in other contexts for economic development to aid regeneration e.g. Powys. The findings will be used to inform the blueprint (Chapter 8) for health/spa tourism as an economic driver for regeneration in Powys.

6.1 THE CITY OF BATH

The City of Bath is seeking to establish itself as an internationally-competitive spa tourism destination based on its comparative advantage and spa traditions. A major part of that effort has been the development of a new £26 million modern spa, set in the heart of the historic centre of the city and built on an existing spa site. Bath has been a spa town, for two thousand years and is built around Britain's only hot mineral springs. For centuries this natural phenomenon has attracted visitors to Bath. The all-important supply of thermal waters rise from a depth of about 3000 metres (10,000
feet) at a rate of around 1.17 million litres per day (¼ million gallons per day) and a constant temperature of 46.5°C (116°F). The waters are thought to originate as rainwater which fell on the Mendip Hills to the south of the City between 20,000 and 80,000 years ago. The waters reach the surface in three places in the city centre, and baths have been built over each of them. In 1984 a new inclined borehole was drilled to tap a spring 84 metres below street level and ensure a pure supply of water (see Figure 6.1)

Figure 6.1: Thermal Waters beneath Bath
(City of Bath Web Link UK 1996)

The spa which provides the focus for the historic BSM project site was different from the majority of Roman-built baths since it was built primarily as a sanctuary of rest and relaxation (whereas others were used for treating armies on the march). The architecture of the baths reflected the importance of the site which fell into sharp decline when the Romans left Britain in 410 AD and were not rediscovered until 1790 during the preparation of the foundations for the then-new Pump Room. During the 18th century once again the city of Bath (like the spa town of Llandrindod Wells in Powys) became a fashionable place for people to "take the waters". The main difference between the spas of Wales and Bath was, and remains, the exceptional
Roman architecture and the spa culture that was established around the hot springs that the Romans left behind. The importance the Romans gave to the site was equally recognised by the Georgians who developed the modern city from the architectural designs of John Wood at that time; Bath was also established as the leading British spa under the direction of Beau Nash. The city continued to exploit the Georgian and Victorian fashion to visit spa resorts for a range of treatments and for the restorative powers of the waters.

The First World War bought enormous political change and social upheaval to the UK. The way of life that had sustained the use of the spa’s in Bath also changed with an abrupt decline in their use. This situation was compounded after the Second World War by the development of the NHS in 1948, and the availability of prescribed modern pharmaceuticals to all. However, unlike many other spa towns in the UK that ceased to operate as a source of cures, in Bath some facilities remained. For instance, a hydrotherapy pool continued to operate from 1948 until 1976, and gave authenticity to Bath as a medical treatment centre. However, in 1976 it finally closed for any medical treatments following a series of problems with the water, which was found to be contaminated. (This problem would re-surface again in the year 2000 when the first application for funding to the MC was made and a member of the public brought about a judicial review to attempt to halt the application claiming the water was contaminated). The local authority was able to show that the introduction of lined boreholes and the constant monitoring of the spa waters by the local authority (from 1980 onwards), had ensured that Bath was guaranteed a clean supply of water. The ability to demonstrate twenty years of clean supplies of spa water was an essential pre-requisite in placing a bid from the MC. The loss of the Spa Baths was a social and economic blow for the town, although it was able to rely on its many other attributes to remain successful as a tourist destination - most notably the ancient Roman buildings,
the celebrated Georgian architecture and high quality landscapes of the district recognised in its two Areas of Outstanding Natural Beauty (AONB) (See Figure 6.2).

Figure 6.2: Areas of Outstanding Natural Beauty in B&NES & the Forest of Avon (Bath & North East Somerset Council 2002)

The quality of the historic and architectural heritage of Bath is recognised by its World Heritage site status and sustains an enviable, vibrant economy. The main visitor attractions that rely on the mineral waters are: the Roman Baths and Temple, the Hot Bath, Cross Bath and Hetling Pump Room. The Roman Baths and Temple are both owned and operated by B&NES and contain the remains of one of the greatest spas in the ancient world (see Figure 6.3). The Hot Bath has been recently restored it is an 18th century Grade 2 listed building designed by John Wood the Younger (see Figure 6.4). The main architectural feature is a curved glass roof above the central feature, which is the thermal pool. Thermal water is piped to each of the 12 former treatment rooms where it is the intention of B&NES Council to offer traditional spa therapy treatments alongside modern complementary treatments.
The Cross Bath (see Figure 6.5) is a small 18th century Grade 1 listed building and is recognised as a sacred site by the World Wildlife Fund's 'Sacred Land Project'. It is intended, upon restoration, that this building will be available for bathing in the water, which flows from the 'Cross Spring' at a consistent temperature of around 46 – 49 degrees centigrade. The Hetling Pump Room was established during the 18th century and was one of several pump rooms where people could drink spring water sourced from the Hetling Spring. The 'Kings Spring' in the Pump Room produced over a quarter of a million gallons a day while the other springs in the city produced 24,000 gallons a day. It was closed as a pump room when the facility was moved to the Hot Bath. The Millennium bid includes provision for the Hetling Pump Room to house an educational research and interpretive centre, together with administrative facilities (see Figure 6.6).
B&NES recognise that tourism, nationally and internationally is fragile and susceptible to external factors with competing new attractions and destinations over which the city has little control (B&NES 2008b) and is operating in a context of intense competition from other traditional and emerging tourism destinations. The Council view the emergence of a new Spa in Bath as an important issue to maintain Bath's position as a premier destination in the face of that competition, particularly since new member States of the EU such as Lithuania, Slovenia and Hungary have an existing established tourism based on the use mineral waters.

6.1.1 STAKEHOLDER ATTEMPTS TO RESTORE A WORKING SPA IN BATH

Since the demise of the working Spa at Bath there were five separate attempts to re-open Bath Spa. Principal stakeholders with an interest in restoring the working spa were in the private sector from the local hotel and catering industry and the Chamber of Trade. Both parties, however, were of the view that the facilities would never re-open principally due to the level of capital funding required to renew outdated equipment and refurbish the buildings to modern standards in keeping with their listed status.

During 1982-1983 several schemes to open the spa were mooted. One scheme got as far as gaining planning consent for conversion and development but was unable to raise capital. Two further schemes emerged: 'Spa Restoration- Bath' and 'Bring Back Our Spa' both of which did not get off the ground, due, in the first instance, to a lack of co-ordinated capital before the revenue consequences were considered. Subsequently, local stakeholder's intent was lost. A further campaign led by local businesses and supported by the local press was called: 'Bring Back Our Spa', which set out to raise public awareness of the lack of a working spa in Bath.
Between 1991 and 1992, the results of a series of EC-funded projects were published. These included an Article 10 'Eurospa' Project and a EU FORCE and EUROFORM project (see Chapter One 1.1.2 EU Force/ Euroform Programmes in Powys). The reports included the findings of a European Community Task Force Human Resources sponsored project linking together a number of Spa towns and areas across the European Community called the SPA project and was entitled 'The Evaluation Of Health Spas as Potential Generators of Economic and Tourism Activities' centred on spas in Spain, France, Italy, Portugal, Southern Ireland and Germany. The report introduced the concept of health/spa tourism and showed how it could be marketed to develop old spa towns using modern therapy technology and 'know how' in tandem with established complementary treatments and that:

*Economic regeneration of the rural Regions of the Community is possible without radically altering the nature of the region, its ambience, its communities and its natural features*

(Lloyd 1992a:49)

The report was presented as an exemplar by the Chairman of the British Spa Federation and the Welsh Development Agency (WDA) to Bath City Council in 1993. In the light of the findings of the report (Lloyd 1992) an attempt was made by The British Spa Federation in conjunction with the Empire Hotel (a purpose built 19th century spa hotel) situated in Bath city centre to adopt the modern therapy treatment model. They gained full planning approval for the venture, but managed only 70% of the capital requirement for the full regeneration scheme so the scheme never progressed. Following the disappointment of the collapse of this much-heralded scheme Chris Cavanagh, (B&NES: Head of Major Projects), was sufficiently impressed by the sustained effort (1992-1997) of the 'Bring Back Our Spa' campaign to recognise the potential of promoting a new spa for Bath. Chris Cavanagh, together with three other B&NES officers (Rhodri Samual, Mike Gray and Paul Simon) decided there was room to look more closely at the opportunities a revived spa industry may bring the
town and saw an opportunity to access funding for a scheme from the MC. The MC was set up in 1994 to distribute funds from the National Lottery to projects which marked the new Millennium (2000). Before work could begin on preparing a Millennium bid proposal, Chris Cavanagh, as head of B&NES major projects, set about appointing appropriate personnel (a mix of officers of the council and elected council members) to form a Bath Spa Project Millennium team.

6.2 B&NES: WORKING IN PARTNERSHIP

During 1997 B&NES appointed a project team to promote a spa bid to the MC the bid was entitled: ‘A Revival of 2000 Years of Spa Culture in Bath’ and was centred around re-generating an existing baths site, the intention was that it would be the focus of a spa revival and ‘health/spa tourism’ initiative for Bath. The B&NES Bath Spa Project Millennium team and their roles in the bid are shown below:

<table>
<thead>
<tr>
<th>B&amp;NES BATH SPA PROJECT MILLENNIUM TEAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOHN EVERITT</td>
</tr>
<tr>
<td>CHRIS CAVANAGH</td>
</tr>
<tr>
<td>RHODRI SAMUEL</td>
</tr>
<tr>
<td>PAUL SIMON</td>
</tr>
<tr>
<td>MIKE GRAY</td>
</tr>
<tr>
<td>LESLEY PALMER</td>
</tr>
<tr>
<td>CLIVE THOMAS</td>
</tr>
<tr>
<td>PAUL CROSSLEY</td>
</tr>
<tr>
<td>COUNCILLOR NICOLE O'FLAHERTY</td>
</tr>
</tbody>
</table>

Table 6.1: Bath and North East Somerset Council (B&NES) Bath Spa Project Millennium Team

The team had embedded ‘community leadership’ as a success criteria objective and benchmark to measure the success of the Bath Spa Millennium Project in its original prospectus documents under the heading ‘Community Leadership’ (see page 6-3 and
Appendix 6.1: exposition of the success criterion). This approach also matched the requirements set down by the MC who required a clear demonstration that the project had genuine local support. The successful proposal was drafted by Rhodri Samual, and was presented to B&NES at a meeting of the Resources Co-ordination Committee on the 9th March 1991: the minutes showed the following programme and budget negotiations.

*Revised scheme design, RIBA (Royal Institute of British Architects)*

Stage D has been agreed, and signed off by the Joint Clients and the Design Team is now at the Detailed Design Stage which will produce the full planning and listed building consent documentation for submission to Committee in June.  

(Bath & North East Somerset Council 2000)

Rhodri Samual became the Policy Manager – (a critical post as events unfolded), Mike Gray, was appointed the Project Manager and Paul Simon, who emerged as the Bath Spa Project Director. These key officers of B&NES were able to demonstrate a prerequisite local support for the bid by the fact that local residents and businesses raised £100,000 towards the MC spa project (see Appendix 6.2; Millennium Commission Spa funding details). Having established the promise of critical local funding to support the bid, the next phase for the project team was to appoint a variety of organisations that would make up the partnership. This would establish the twelve key stakeholders who would, in partnership, deliver the content of the MC spa bid to bring about *A Revival of 2000 Years of Spa Culture in Bath*.

The twelve key partners of the BSM project were made up of consultants, consultees, contractors and suppliers, the organisations and their roles in the project are shown below.
### PARTNERS IN THE BATH SPA MILLENNIUM PROJECT

<table>
<thead>
<tr>
<th>ORGANISATION</th>
<th>ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BATH &amp; NORTH EAST SOMERSET COUNCIL</td>
<td>BATH SPA PROJECT TEAM</td>
</tr>
<tr>
<td>THE MILLENNIUM COMMISSION</td>
<td>GRANT FUNDING</td>
</tr>
<tr>
<td>NICHOLAS GRIMSHAW AND PARTNERS</td>
<td>ARCHITECTS</td>
</tr>
<tr>
<td>DONALD INSALL ASSOCIATES</td>
<td>CONSERVATION ARCHITECTS</td>
</tr>
<tr>
<td>OVE ARUP AND PARTNERS</td>
<td>ENGINEERING DESIGN</td>
</tr>
<tr>
<td>DR. G. KELLAWAY</td>
<td>HYDRO GEOLOGICAL CONSULTANT</td>
</tr>
<tr>
<td>J. MOWLEM</td>
<td>CONTRACTORS</td>
</tr>
<tr>
<td>THERMAE DEVELOPMENT COMPANY (TDC)</td>
<td>SPA OPERATOR</td>
</tr>
<tr>
<td>BATH SPA TRUST</td>
<td>CONSULTEE</td>
</tr>
<tr>
<td>BATH PRESERVATION TRUST</td>
<td>CONSULTEE</td>
</tr>
<tr>
<td>THE BRITISH SPA FEDERATION</td>
<td>CONSULTEE</td>
</tr>
<tr>
<td>ACCESS BATH</td>
<td>CONSULTEE</td>
</tr>
</tbody>
</table>

Table 6.2: Bath Spa Millennium Project: Partners

The key partners in the BSM project were: J. Mowlam (JM the construction company), Nicholas Grimshaw and Partners (NG&P the architects), Thermae Development Company (TDC) (a Dutch company with extensive experience as European spa operators) and critically, the residents and businesses in the City of Bath. Each of the partners was individually critical to the furthering of the initial bid.

Following an initial tendering process six contractors were invited by B&NES to submit a second, fuller, tender, upon which the Authority made the final selection based on 'best value'. The reputable UK construction company; JM was represented by the Chief Executive, Sir John Gains who submitted the winning tender. A number of
architects were invited to submit proposals for the development of the new spa on a sensitive World Heritage site. This presented a problem for B&NES as the city contained a unique combination of architecture and spa history and there were no other comparable projects on this basis to make a selection. B&NES eventually awarded the commission to the internationally renowned architects NG&P. The decision was based on the companies established reputation for innovation in both architectural and industrial design and its close association with Donald Insall Associates (an architectural practice with over forty years experience) to develop restoration designs to meet the challenge of architectural solutions within the confines of Bath’s heritage.

There are no spa operators based in the UK, so advertisements were placed in European Journals for applicants to tender to run the proposed spa. B&NES made several stipulations in the condition for application: first, that the selection of the private sector partner and spa operator was based upon the company having five years of sustained successful commercial spa operation experience; second, that the successful applicant would have to invest financially in the project. TDC were the only serious private sector company that showed an interest in formulating such a partnership. B&NES subsequently sealed the deal with TDC making an investment of £4.75 million. The MC funding was predicated on raising capital, subsequently £100,000 was raised from individuals and local businesses in the City of Bath.

The successful project was based around a modern ‘remise en forme’ (getting back into shape) concept of spa, as in the Lloyd (1992) model (see Appendix 6.3 Lloyd 1992a), to target day and short break tourists and not follow the European traditional spa model of 7-21 day retreats for a ‘cure’. The project bid was based on a partnership basis with the accommodation, health sectors, residents associations, organisations
and businesses of the City of Bath. The fundamental credo of the bid was that the new spa would not only re-vitalise thousands of years of spa culture in Bath and the UK, but would also benefit the local economy by:

- The creation of 90 direct and 190 indirect jobs in the local economy.
- An additional estimated annual spend in the local economy of £5.4 million.
- Generating buildings, training and local contracts worth and estimated £12-17 million over two years.
- Offering further spin off projects, e.g. new hotels, casino, private hydro-clinic and training facilities.
- Offering increased confidence for further inward investment to the city.

The bid also indicated that the spa would be a major boost for the city. Converting only 2% of day visitors to overnight stays in Bath would add 54,000 customers and 92,000 bed-nights. A shift in the average length of stay from 1.7 to 1.8 nights (plus 6%) would add a further 56,000 bed-nights. It was projected that the spa would also increase the reason to visit Bath all year round thereby boosting the less busy period between October and March.

The Project Director and the Project Manager anticipated that the marketing strategy for the new spa would be based on the concept of a unique ‘Spa Experience in Bath’ and would be managed through a joint marketing initiative. The marketing of the concept would, therefore be brought together by the Bath Tourism Bureau, (the destination), the accommodation sector (made up of local hotels and guesthouses) and TDC (the spa operator) who, working in partnership, would be responsible for the commercial success and performance of the venture. The project officers perceived a successful coming together of these parties on the basis that they would cooperate
with marketing the new venture as they would be the main beneficiaries of a successful commercially operated spa.

### 6.3 BATH SPA MILLENNIUM COMMISSION PROJECT

In all, the project received funding of £20.6 million; including £7.7 million from the MC. The following shows the key partners (stakeholders) and their value of contribution to the project:

<table>
<thead>
<tr>
<th>STAKEHOLDER</th>
<th>CONTRIBUTION TO PROJECT: CASH</th>
<th>CONTRIBUTION TO PROJECT: OTHER</th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;NES</td>
<td>£11,097,169</td>
<td>£1,160,000 VALUE OF BUILDINGS</td>
</tr>
<tr>
<td>BATH SPA TRUST</td>
<td>£100,000</td>
<td>-</td>
</tr>
<tr>
<td>THERMAE DEVELOPMENT COMPANY (TDC)</td>
<td>£5,619,487</td>
<td>-</td>
</tr>
<tr>
<td>BATH SPA RESIDENTS</td>
<td>£100,000</td>
<td>-</td>
</tr>
</tbody>
</table>

| Table 6.3: Stakeholders Contribution to Project |

The partners and the B&NES project officers perceived the project as building on existing market strengths and not attempting to create a new volume market. TDC have the responsibility for the commercial success performance and management of the spa complex and in return B&NES will receive rent, a fee for the supply of the thermal water and a profit share. The projected turnover for the new development was £4.2 million a year, three quarters of the turnover coming from the leisure spa, based on a given average admission of £23 with an audience potential of 937,000 staying visitors, and 2.7 million day visitors for a half day visit. There is a 'one-off' charge for the spa users which entitles the use of all of the facilities within the leisure spa; one-to-one treatments will incur a further separate charge. As a lottery-funded scheme the rules dictated that there could be no membership fee for using the spa and the operator will be unable to introduce one in the future. These figures assume 165,000 local residents and 3.6 million visits to the town from regional shoppers within a 90-minute
drive. The projection is based on the rationale that if one third of the 20,000 visitors that Bath receives each day use the spa it would be full every day. If every resident of Bath used the spa just once a year on this basis the project would be therefore be viable. In all, the project assumes 1,156,000 visitors per annum to the main leisure spa for viability and future sustainability.

During October 2002 the new Millennium spa was built on the site of the 1920s municipal swimming pool in Beau Street. The new building is a cube shape design, built in Bath stone and supported by four giant columns surrounded by glass and houses thermal pools, steam and massage rooms (see Figure 6.7). The new spa facility makes Bath the only place in the UK where it is possible to bathe in natural, hot thermal water. TDC will dedicate twenty five per cent of the spa facilities to medical treatments (illness) and 75% of the facilities for relaxation and modern therapy treatments and leisure use (wellness).

![Figure 6.7: Model of the Bath Spa Project (British Broadcasting Corporation 2008)](image)

The new spa was due to be opened to the public on the 7th August 2003 in front of a live televised, international audience. One week away from the high profile opening B&NES was forced to make an announcement to the waiting media that JM the construction company contractors had refused to sign the New Spa Millennium building ‘off’ to the operators TDC and further, could not give a firm date for the opening of the facilities. No other information was given at this time. It was in these circumstances
that the opening night went ahead as planned. Figure 6.8 shows official opening ceremony by the world-famous tenors Jose Carreras, Placido Domingo and Luciano Pavarotti ('Three Tenors') and Figure 6.9 shows the grand finale firework display.

While this scenario needs explanation, it also needs to be set against the following:

- the criterion set up for the project in its prospectus, to see how far it achieved its objectives.
- what occurred and what were the circumstances that forced a serious delay in the opening of the project.
- and finally, what the lessons were / are available for the transfer of the knowledge and procedure to other locations and organisations.

The following describes the findings of meetings and interviews with the key members of the B&NES project team. The combined results of the methods used describe the story of the BMS project from its original conceptual stage through to completion, and further, the final frank reflections of personal regret and professional disappointment when the project could not be completed on time.
6.4 BATH SPA MILLENNIUM COMMISSION PROJECT A STAKEHOLDER PERSPECTIVE

The following section describes the outcome of an interview with the key members of the B&NES project team: Rhodri Samuel, (Client Policy Manager and Bath Spa Co-ordinator), Paul Simon (Bath Spa Project Director) and Mike Gray (Bath Spa Project Manager).

B&NES became involved in the BSM project when they recognised the positive benefit of the sustained and emotive campaign ‘Bring Back Our Spa’. B&NES regarded the application as relatively straightforward in that it required a huge capital outlay, but for the MC (the body responsible for allocation of funding) it was more difficult. This project was unique and the Commission had no comparable projects for guidance. This resulted in the Council ‘guesstimating’ project costs, rather than making responsible estimated expenditure costing based on previous ‘like’ projects. This unique situation led to several problems for the team. There were, for example, no exemplar architects and no exemplar projects to draw on. Selecting architects was resolved by B&NES advertising in the Official Journal of the EU (OJEC) and finally selecting from 11 written responses. The commission was given to NG&P on the basis of their response to the ‘development brief’ with the initial construction costs being estimated between £11 and £13 million.

The size of the contract, and the sources of funding, required that the tendering process for contractors should also be placed in the OJEC. There were 140 applicants each of whom were given questionnaires developed by B&NES from the replies; a short list of 10 was selected with an invitation to tender for the contract. From the tenders received, the contractor JM was selected on the basis of price rather than a
partnering contract. Rhodri Samual explained that it is unusual to select a contractor on this basis but it is a familiar arrangement with the construction industry where it is used to break down overheads and profit.

The original 'guesstimate' became a real impediment to the project at the outset and the lack of certainty over the real cost of the project meant that the bid was delayed and did not go in on time. Another major concern for the Council was the scale and impact of both the capital and revenue 'budget'. The Council devolved the responsibility for overseeing this 'budget' to three elected members of B&NES. Rhodri Samual described these members as 'representatives' of B&NES. The process was described as 'informal' (which means there are no records) and the three members' status when working with the Millennium Commission was as 'representatives' of B&NES. As such, the elected 'representatives' negotiated directly on behalf of the Council with the MC. A major difficulty occurred when these three key elected members were not re-elected and it fell to the three B&NES project officers to give a steer to setting up a new working group within a new structure. There followed private sessions in tandem with public meetings, which included 21 public bodies, with meetings arranged monthly over twelve months. A strategy was formulated to bring everyone who had any interest in Bath and its future 'in scope' and 'on line'. The strategy worked in so far as all parties, in the event, supported the scheme. A consultation strategy, in line with a development strategy, identified those who might be for and against the project. For example, the 'Bath (Preservation) Society' preferred to see the new development in 'pastiche' style, but, such a style was considered by others in the consultation process as to be 'limiting' and 'unworkable. Instead of this being an irresolvable issue, the 'Bath (Preservation) Society' was invited to become part of the team that selected NG&P (the architects). Rhodri Samual said that as far as he was
Chapter 6: Case Study Bath Millennium Spa

centered the message was resoundingly loud and clear - *take all of the people with you if you want to be successful*.

At the outset there were critical operational problems concerning TDC which had to be overcome. TDC staff were made up of Dutch Nationals who had to understand the cultural nuances of listed building legislation whilst still fulfilling the brief. The officers described how the company had to be 'educated' in the ways of dealing with listed buildings – one instance occurred over limitations on maximising floor space. The developers wished to maximise the floor space within the envelope of the existing building, this was not possible by virtue of the listed status of the building, (meaning that the buildings features and structural integrity had to be retained within any proposal). TDC learned quickly to be sensitive to other partners including organisations such as English Heritage, whose mission is to ensure that the historic environment of England is properly maintained and cared for and to understand there were other issues more important than floor space. In order to iron out further complications in order to fulfil all of the requirements of the project bid, the project team arranged a three-day workshop in London for all of the partners in the offices of the architects NG&P with the proviso that 'no one was going home' until all the outstanding issues were resolved. Rhodri Samual who organised the London event said that the level of agreement reached at this meeting (where all partners 'signed up' to the project) was the basis of the eventual success of the bid.

B&NES had been responsible for putting together the planning application (the planning process took 18 months in total) and had ensured that there was consultation at every stage from concept to detailed planning. The brief to the consultees, (Bath Spa Trust, Bath Preservation Trust, The British Spa Federation and Access Bath) required that the project should match the eligibility criteria of the funding mechanism.
Sir Nicholas Grimshaw told the council officers that his firm had never before taken in this level of consultation and the notion of keeping the public on board was exceptional.

When the interviewees were asked the critical question: 'did the final approval match the original aspirations?' (See Appendix 6.4 questionnaire - used as an aide memoir) the answer was given as 'Yes and No'. The reason for this ambivalence was that some cherished ideas and original concepts over a period of time had been lost. The project team gave examples such as a fundament idea of working a filigree of pipes into a glass window had on plan looked 'sensational'; but the subsequent estimated cost of £2,000 per square metre had rendered the design an untenable feature. Another issue emerged regarding the available floor space of the spa itself, which had to be reduced as the scheme progressed making the entrances less dramatic than anticipated from the initial plans. More importantly, real problems emerged concerning the basic concept of the design of the spa: TDC were committed to organic (curved) architecture, whereas Bath is known for its classical (straight) architecture. The architects resolved this issue by designing curves, squares and rectangles which resonated with Bath’s famous curved architecture.

The project’s success centred on the commitment of B&NES committing capital monies to the project but not revenue support, which meant that the long-term success of the project depended on the contribution by paying guests. The project team had no hesitation in saying that the new spa would be both viable and competitive since the City of Bath welcomes 3.8 million tourists per year. Currently the Roman Baths receives 915,000 visits per year and as a result the new project is based on people who will come to the City to relax to appreciate the experience and the expectation is that once the doors of the new spa are open, there are already sufficient numbers of visitors to Bath to make it viable. The only problem that they could foresee is that ‘the
project might be too small'. In the event the project ran into very serious problems and the spa was not operational until 2006.

6.4.1 THE DELAY IN THE OPENING OF THE BATH SPA MILLENNIUM COMMISSION PROJECT: THE REASONS

The reason for the delay in the opening of the BSM project was a sensitive subject, which at the time of the interview was sub-judicæ with the media mounting a daily campaign to attempt to unravel the reasons for the delay. It would have been understandable if the interviewees had declined to answer questions relating to the problems surrounding the delayed opening of the new spa. The original opening date was set for 2001; the gala opening event occurred in 2003, this interview took place in February 2004. However, despite the difficult situation the interviewees were open and straightforward and said the spa had not opened on schedule due to legal contractual issues between B&NES, the contractor and the architects.

The dispute centred on the application of paint in the newly built spa baths. This issue, it appeared, was the last in a series of disputes and was not an isolated incident between B&NES and JM the contractor. In the main, the issues had arisen over the conduct of the contract, both in building progress and fiscal propriety. Rhodri Samual said that in his opinion the problems had all emanated from JM the contractor. Initially, they appeared to be satisfactory in terms of competence and the ability to deliver, until it became apparent to B&NES that the contractor was viewing the contract as a method to extract more from the Council via claims for variations and disputes. The interviewees cited as a major problem the issue that 'the contract programme was never properly managed'. In addition, the site management personnel had changed which caused interruptions in continuity. This was paralleled by concerns over the
quality of the work by the project manager who said that what emerged from this was an atmosphere of 'suspicion and mistrust' between the parties. The delay, the interviewees felt, was, from such circumstances inevitable since the situation was politically unacceptable, but equally 'backing down' to an apparently unscrupulous contractor was equally invidious and not an option; hence the delay had occurred. The interviewees, agreed that the contract should have been finished by October 2001, but by February 2003 there was from this point 'no faith in the programme'. The relationship, they continued was 'soured' and 'suspicious' and B&NES realised 'they were not in the boat together'. Rhodri Samuel said 'a brave client would have ignored the contract', but the advice from the legal team 'was not to' since 'relationships had deteriorated so badly' and to have wilfully ignored the terms of the contract would have laid B&NES open to significant claims, which in the view of the project officers appeared to be exactly the position the contractor wished to be in.

These difficulties centred on a single main issue; the paint finish 'bubbled', the pool was subsequently drained which precipitated 'more bubbling'. Following a High Court injunction (2003), the Council won its appeal, whereby an agreement was reached. The action centred on an issue of paint application and paint specification, the contractors; claim that the bubbling of the paint was entirely due to the specification by the architects who take the alternative view that it was the contractor who has applied the paint wrongly. The High Court injunction ruled for a forensic analysis of the paint and its application, but the report produced was inconclusive, in as much as it did not attribute clear blame on one side more than the other: The report said that it was mostly the fault of the contractor who applied the colour to the cement, but on the other hand there could have also been fault with the application which would have been prescribed by the architects. B&NES for its part said that these issues did cause a problem; the building remained closed to all parties (except the contractor) for eight
months. The final denouement occurred in the High Court (2003) ostensibly over the quality and application of paint, but in reality, it was the nadir of a soured and prolonged poor relationship between B&NES and the contractor.

The interviewees agreed that it had been a most difficult project; Rhodri Samual said it had turned into a *project from hell* and cited the main problems as:

- The site itself and its restriction on the footprint of the building limited the opportunities for commercial success as far as TDC were concerned.
- The site was Grade 1 Listed with implications for material specification and project management.
- The site was surrounded by Roman and medieval archaeology limiting off-site operations.

6.5 SUMMARY OF FINDINGS: B&NES WORKING IN PARTNERSHIP WITH KEY STAKEHOLDERS OF THE BATH SPA MILLENNIUM COMMISSION PROJECT

The impetus for the project came from B&NES who embedded community leadership as a success criteria objective in the original BSM project prospectus document: The following summary focuses on the relationship between the key stakeholders: J M, the project architects: NG&P and TDC the spa operators and attempts to show the local authority role in the development of the project and if it has succeeded in matching its own benchmark for success.

JM were appointed by B&NES, but the partnership was fraught from the start. Construction was scheduled to begin on the 4th September 2000. The first delay was caused when the Council received an application from a local resident who applied for a Judicial Review claiming the water was contaminated as a direct result of which all work on the new project was suspended. A further delay occurred while B&NES employed a geothermal technical consultant who carried out tests on the water, the
findings of which refuted the charge of contamination; as a consequence the High Court issued a consent order on the 9th November 2000 delaying the start of the project by two months.

The contractors started construction work on the 10th November 2000, the delay resulted in a further litigation when JM actioned a High Court Order against B&NES for the delay in starting the project. The relationships between B&NES and JM were soured by this action at this early date. The breakdown continued when B&NES did not receive promised progress reports and deadlines for completion of section builds. The target completion date: 10th May 2002 was not achieved nor was the revised completion date 6th August 2003. The final breakdown in relationships concerned the application of paint in the spa pools and B&NES were forbidden to enter the site of the new spa. The matter was contested in the High Court where J M sued B&NES for £6 million compensation. The final cost of the development was £45 million, the court case with J M amounted to £20 million and the local government minister Phil Woolas asked the Audit Commission for an official inquiry.

The other main issues which emerged from the interview were: TDC, were largely untested as spa operators they did not meet the partnership agreement deadline of 1st August 2000 which forced B&NES to become the sole underwriter of the project (a decision made in Council 13th July 2000 in the event of a suitable private partner not being found). Following a realistic European advertising campaign and search for a spa operator only TDC expressed an interest in operating the completed project. TDC submitted a belated unsolicited offer on the 18th August 2000, which was reported to the members of B&NES Council on 19th October 2000 who made no decision (Bath Spa Sub Committee: 23rd November 2000). Three unsolicited offers followed which were reported during a consultation meeting between the strategy spokesperson for
the Council and the Council Chief Executive. The meeting concluded with a set deadline of 30th November 2000 to resolve any outstanding issues the Council may have had with the proposed TDC offers, which may preclude the Council from consideration should it wish to go ahead. On the 20th December the Chief Executive reported to Council his intention to commission Veale Wasbrough (B&NES’s leading counsel) to establish the council’s lawful position in first accepting TDCs latest offer in the light of their failure to comply with the original deadline of 1st August 2000, and second, given that situation, the B&NES position should TDC not re-tender. In the event, the result of the legal investigation deemed that B&NES had a duty to consider the substantial offer TDC made as a council requirement of ‘best value’.

Meetings held on 11th December 2000 between lawyers representing both parties confirmed TDC’s offer, heads of agreement (briefing paper on Procurement of New Operator dated 20th December 2000) were drawn up which committed TDC to a closed contract with a deadline of 14th February 2001, and this agreement went before the Council on the 12th January 2001.

Cultural differences between the operators and the architects quickly emerged. While TDC had extensive experience in Europe they seemed to misunderstand the importance of the site as a World Heritage site which they did not see as limiting factor for more space and curved architecture, whereas for other stakeholders it was the whole point of the exercise. These issues were eventually resolved by incorporating both elements of design into each floor of the building within the original building ‘footprint’. The remaining economic problem for TDC was their continued inability to open to the public. The company had a fully-trained, uniformed staff ready to work with the public at the original opening date but they were forced to make all but a few key managers redundant and TDC had invested £4.75 million in the infrastructure of the


spa. Relationships between B&NES the local authority and TDC as a private sector partner did remain positive and the spa is now fully operational.

On a personal level, for seven years the B&NES project team had worked together and had wanted to finish the project with the 'Three Tenors' concert as the pinnacle of its success. They all 'became very depressed' when; because of 'time-factors' they had to move on to other projects before seeing the work completed. They had felt continually frustrated by the legal issues, which bound people to say nothing to defend their position and betray the legal injunction, which could have affected litigation. At a professional level the experience with the BSM project demonstrated clearly that this (or any other) Council must, in future, manage projects better, particularly at the outset. However, they also felt that they did manage the planning consent well and moved the contemporary planning from the 'boring pastiche'. The advice they would give to any local authority should they wish to embark on a similar venture would be 'authenticity of evolution' taking the identity of the place and 'build on cultural identity': 'build on what's there rather than the example of the Millennium Dome where the location was arbitrary, play to your strengths and ask, for example, what is special about Powys and Mid Wales?'.

6.6 EVALUATION AND CONCLUSIONS OF APPLIED STAKEHOLDER THEORY

The case study of the Bath Spa project was used to identify and establish the roles and responsibilities of a local authority acting as dominant stakeholder in leadership of a major public-private partnership to inform the potential development of a similar regeneration project in Powys. The Mitchell et al. (1997) stakeholder model was used to analyse positions of the key stakeholders in the project in terms of their power,
legitimacy and urgency – attributes identified by Weber ‘as core attributes that are expected to affect stakeholder salience and, when combined, to constitute authority’ (Weber 1947: 56) - and to see how these attributes shifted over the lifespan of the project and how the dominant stakeholder dealt with this to ensure that the project reached completion.

In the case of the Bath Spa Millennium project the key stakeholders were identified as follows:

1. BATH AND NORTH EAST SOMERSET COUNCIL B&NES;
2. THE MILLENNIUM COMMISSION;
3. J. MOWLEM (CONTRACTOR);
4. THERMAE DEVELOPMENT COMPANY (TDC);
5. LOCAL POPULATION OF BATH (RATEPAYERS).

The Mitchell et al. (1997) typology was used to analyse the positions of these stakeholders and their possession of the core attributes of the attributes power, legitimacy and urgency. Case study methodology proved invaluable for collecting data relating to the BSM project. Yin (1984: 80) indicates both the strengths and weaknesses of case study research. The strengths of case study methodology include the use of multiple methods, in this case interviews and documentation on the historical background of the project including the minutes of public meetings, to collect pertinent data. The interviews with the B&NES project team were particularly important but as Yin (1994) identifies caution must be taken as the interviewee may express what the interviewer wants to hear. Tellis (1997: 5) similarly cautions the use of documents which ‘may lead to false leads’. To ensure the validity and the reliability of the research, data collected through interviews was corroborated with the documentary evidence and data from documents was corroborated with the interviews.
During the life of the Bath Spa Millennium project 'stakeholder salience' shifted dramatically. Initially the officers and elected members of B&NES demonstrated power, legitimacy and urgency. **Urgency** in wanting to respond to local press coverage of the campaign to 'Bring Back Our Spa', **power** from the electorate to set up a project team to write a Millennium bid and **legitimacy** as representatives of the people of Bath to match fund a capital project.

Since B&NES could not fund the project alone they were forced to use a mechanism so to do, in this case, the MC. At this point **power** was transferred to the MC who held the future of the project within their control and required the local authority to write a bid to meet their funding criteria. The funded proposal was therefore not necessarily the proposal that the authority might have otherwise made had they been in a position to solely fund the project. Thus, the MC held **power, legitimacy and urgency** until they had satisfied themselves that the local authority had completely satisfied the funding criteria and hosted the official opening celebration. Following the celebration the MC no longer held **legitimacy** to wield power and further influence the project. This was despite the fact that the project was in dispute and remained closed to the public.

It was the local authority, as dominant stakeholder, which selected the contractor (JM) and the spa operator (TDC). During the construction phase JM held the legal responsibility for the site, and all other stakeholders were effectively barred from the site except by invitation from the contractor. Thus JM were effectively the dominant stakeholder during the construction phase. Planned meetings between the contractor and other stakeholders did not take place as had been agreed resulting in mistrust which led to the eventual breakdown in relationships within the partnership. The project facility closed immediately after the opening celebration giving the contractor sole **power** and **legitimacy** to solely occupy the site. However in this phase they
lacked urgency and the project reached an impasse which had to be resolved in court. In this phase TDC, as the spa operator, had legitimacy and urgency, but had no power to move into the spa and start its commercial enterprise.

The residents of Bath and local backers, many of whom were local businesses who had hoped to secure an increase in revenue at the earliest opportunity, initially had power since local support was a fundamental criterion for legitimising the initial bid with the MC. However they now, along with the local authority and the MC, had the urgency to see the project successfully concluded but lacked the power and legitimacy to make it happen. Although these stakeholders can draw their own conclusions about the project and can ultimately demonstrate their power through the electoral process this is very much in the longer term.

For the MC to have waived its option for power and legitimacy and withdrawn from the scheme before the commercial enterprise had started is surprising since another of its enterprises ‘The Millennium Dome’, also funded from public lottery monies, was a controversial project that had hit similar problems. It would have perhaps been beneficial to the project if the MC had remained the dominant stakeholder with the power, legitimacy and urgency to bring all parties together to resolve the situation and reach a solution to the problems.

There are features of the project that are unique to Bath, in particular, the site and its listed status, but the complexity of the contractual arrangements and the management of the project would be common to any similar projects elsewhere. Any Council-led project would need to find funds and a project team to manage the project in a timely and effective manner.
The BSM project has shown that to build a new capital project needs both passion and commitment by key stakeholders. From interviews I got the distinct impression that the successful outcome of this project, that is to say, the building of the spa, was due in large measure to the personal commitment and passion displayed by Rhodri Samuel, Mike Gary and Paul Simons who openly confessed to being obsessed with the project and were ‘deluded into thinking it was fundamentally important to the City of Bath’. While they still felt that it was an important project to undertake (primarily since the public wanted it) they would, if starting out again, have avoided the ‘project having a detrimental effect’ on their personal lives. The one single issue that they felt would have had a major impact on the outcome of the project would have been to have carried out effective risk assessments of the project before starting. Today (2008) the Council would have to go through the formal process of carrying out risk assessment on the project.

There was ‘negligible’ impact on local businesses according to the interviewees, the spin-off from the positive publicity generated from the Gala concert (which in the event ceased to be talked of as an ‘opening,’ but rather went ahead as a ‘celebration of the new spa’) received ‘fantastic coverage’. Finally, the team said they were untroubled in real terms since Bath is both a good summer and winter facility with 70% of tourists being made up of day visitors, while 25% are short-break destination. The project, they concluded, would give a wider offer to the existing tourism market, thus fulfilling their long-term marketing strategy of using tourism as a primary economic generator.

The main conclusions that can be drawn from this case study are that:

- B&NES were successful in demonstrating that they could lead a project with partners where others had failed. B&NES showed that they could both set up and work in partnership by working with all interested parties and gaining
support for the project cross sector at the outset and secure MC funding for the project.

- When forming a partnership between disparate partners all parties should be clear at the outset on what they are trying to achieve and the roles and responsibilities of each partner.
- There needs to be clear leadership and ownership of the project throughout its lifespan by the dominant stakeholder.
- The BSM project did not undertake effective risk assessment and management.
- Enormous personal commitment was required by the dominant stakeholder to carry the project through to completion.
- It is critical to employ people who are expert in their own field, TDC had a vast amount of experience operating spas and an in-depth knowledge of water treatments in the Netherlands but critically they did not understand the cultural context in which they were operating.

6.7 RECOMMENDATIONS AND TRANSFERABLE LESSONS FOR POWYS

The revitalisation of the economic pre-eminence of Bath through the development of a modern world-class spa is an excellent exemplar of the kind of project proposed in this thesis for Powys. The transferable lessons for Powys from the BSM project seem clear:

- There needs to be a lead partner within the public-private sector partnership with the power, legitimacy and urgency to act as dominant stakeholder.
• The lead partner needs to maintain the trust of all partners throughout the project implementation.
• There needs to be clearly defined roles and responsibilities for each project partner and a consensus amongst all stakeholders of the performance indicators for success.
• A risk assessment undertaken at the start of the project and throughout the project and appropriate risk control measures implemented.
• The dominant stakeholder must recognise the enormous personal commitment required to carry the project through to completion.
• Any sub-contracting of the project must be to parties that are expert in their own field and understand the cultural context in which they were operating.

6.8 CONCLUSIONS

Bath Spa showed itself to be a good example of a major capital build project implemented through public-private partnership. It also demonstrates the usefulness of the Mitchell et al stakeholder typology in understanding stakeholder behaviour in relation to such a project. The local authority were the lead partner in the project and should have ensured that they retained their power, legitimacy and urgency throughout the project. During the construction phase they relinquished dominance to JM and when the 'bubbling paint' problems emerged with JM the local authority did not have sufficient power to regain dominance and resolve the problems in a timely manner.

The data collected in this case study derives from interviews with B&NES and was corroborated through documentation including the minutes of public meetings and direct observation. Were I to do this study again I would probably seek to supplement the interviews through interviews with the wider set of stakeholders, particularly JM and
TDC, to explore in more detail contractual and other mechanisms to avoid the impasse reached in the BSM project.

The next chapter, chapter seven, will present a case study of Powys in Mid Wales to apply the lessons learnt from the French case studies in chapter five and the Bath Spa Millennium Project in this chapter to the development of a blueprint for health/spa tourism in Powys.
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CHAPTER 7

CASE STUDY: POWYS

7.0 INTRODUCTION

The towns of Llangammarth Wells, Llanwrtyd Wells, Builth Wells and Llandrindod Wells developed as Victorian spa resorts in the 19th century for several reasons: the sources of mineral water; the fashion for cures in Victorian times; the construction of the Central Wales Railway line (1868) passing through Mid Wales and stopping at each spa town offering a direct link to the North West of England, the Midlands and South Wales (Archives Network Wales, nd a). The railway was extremely important as many of the curistes travelled by train from the industrial and mining areas of South Wales, particularly to Llangammarth Wells, Llanwrtyd Wells and Builth Wells. Llandrindod Wells, in contrast, had established itself as a Roman spa and later in C18 as a destination for wealthy visitors seeking the cure. In C19, the working and living conditions in the Welsh valleys were generally poor and the wells of the spa towns provided workers with a break from hard work for a holiday in clean and pleasant surroundings with good quality air and the opportunity to take the waters.

In the 1880s as many as 80,000 visitors came annually to Llandrindod Wells alone. However, by 1927 the Mid Wales spa resorts were in decline (History of Llandrindod Wells 2005). Several factors contributed to the decline. First, was the effect of the First World War second, was a preference for holidaying in the newly-built seaside resorts of
Porthcawl and Barry Island in South Wales which competed favourably with the efficacy claims made by the spas for taking the waters and were geographically closer to the industrial towns. Third, was the depression of the 1930s and the concomitant reduction in disposable income. Finally, in 1948 the introduction of the NHS which would provide guaranteed medication and hospitalisation for the population. These factors combined to sound the death knell for the wells and spas of Powys from which they never recovered.

However these now-defunct spas provide the basis for the proposition that there is the potential to regenerate the spa towns of Powys using health/spa tourism as an economic driver and creating a tourist destination focused on spa and wellness based on key elements identified in the French spa towns’ case studies in Chapter 5. Critical attributes found in the Auvergne and Saint-Malo are also evident in Powys. The proposed health/spa tourism agenda would capitalize on the comparative advantage of Powys: beautiful peaceful countryside, rural landscapes, scenery and water, a developed tourism infrastructure through its history of traditional spas, and training courses for health/spa tourism, to create competitive advantage through the development of a Spa and Wellness Trail leading from Ystradgynlais, through Brecon to the historic spa towns: Llangam march Wells, Llanwrtyd Wells, Builth Wells and Llandrindod Wells and the Elan Valley Dams (see Figure 7.1). This chapter will test that proposition through an audit of Powys against the elements of the model for health/spa tourism proposed in Chapter 3 and used in Chapter 5 for the presentation of the case studies of the spa towns in the Auvergne and Saint-Malo.
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CHAPTER 7

CASE STUDY: POWYS

7.0 INTRODUCTION

The towns of Llangammar Wells, Llanwrtyd Wells, Builth Wells and Llandrindod Wells developed as Victorian spa resorts in the 19th century for several reasons: the sources of mineral water; the fashion for cures in Victorian times; the construction of the Central Wales Railway line (1868) passing through Mid Wales and stopping at each spa town offering a direct link to the North West of England, the Midlands and South Wales (Archives Network Wales, nd a). The railway was extremely important as many of the curistes travelled by train from the industrial and mining areas of South Wales, particularly to Llangammar Wells, Llanwrtyd Wells and Builth Wells. Llandrindod Wells, in contrast, had established itself as a Roman spa and later in C18 as a destination for wealthy visitors seeking the cure. In C19, the working and living conditions in the Welsh valleys were generally poor and the wells of the spa towns provided workers with a break from hard work for a holiday in clean and pleasant surroundings with good quality air and the opportunity to take the waters.

In the 1880s as many as 80,000 visitors came annually to Llandrindod Wells alone. However, by 1927 the Mid Wales spa resorts were in decline (History of Llandrindod Wells 2005). Several factors contributed to the decline. First, was the effect of the First World War second, a preference for holidaying in the newly-built seaside resorts of
Porthcawl and Barry Island in South Wales which competed favourably with the efficacy claims made by the spas for taking the waters and were geographically closer to the industrial towns. Third, was the depression of the 1930s and the concomitant reduction in disposable income. Finally, in 1948 the introduction of the NHS which would provide guaranteed medication and hospitalisation for the population. These factors combined to sound the death knell for the wells and spas of Powys from which they never recovered.

However these now-defunct spas provide the basis for the proposition that there is the potential to regenerate the spa towns of Powys using health/spa tourism as an economic driver and creating a tourist destination focused on spa and wellness based on key elements identified in the French spa towns’ case studies in Chapter 5. Critical attributes found in the Auvergne and Saint-Malo are also evident in Powys. The proposed health/spa tourism agenda would capitalize on the comparative advantage of Powys: beautiful peaceful countryside, rural landscapes, scenery and water, a developed tourism infrastructure through its history of traditional spas, and training courses for health/spa tourism, to create competitive advantage through the development of a Spa and Wellness Trail leading from Ystradgynlais, through Brecon to the historic spa towns: Llangammarch Wells, Llanwrtyd Wells, Builth Wells and Llandrindod Wells and the Elan Valley Dams (see Figure 7.1). This chapter will test that proposition through an audit of Powys against the elements of the model for health/spa tourism proposed in Chapter 3 and used in Chapter 5 for the presentation of the case studies of the spa towns in the Auvergne and Saint-Malo.
Chapter 7 opens with Section 7.0 which is an introduction to the County of Powys. Section 7.1.1 is a profile of the Powys population and some of the environmental projects set up in Powys with EU funding. Section 7.1.2 looks at the economy of Powys; the resultant health inequalities found in the county and some of the measures set up to combat these issues. Sections 7.1.3 looks first at the strategy for employment in Wales and Section 7.1.4 outlines the difficulties the county faces in the implementing a tourism strategy for Powys. Section 7.1.5 looks at the mineral waters available in Central Wales and Section 7.1.6 investigates recent attempts to revive the once buoyant spa industry in Central Powys.
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The focus of the audit is found in Section 7.2 and has taken place in the six locations associated with the Powys Spa and Wellness Trail the profile of each town is found in the following sections: Ystradgynlais (7.2.1); the Brecon Beacons (7.2.2); Llangammarch Wells (7.2.3); Llanwrtyd Wells (7.2.4); Builth Wells (7.2.5) and Llandrindod Wells and the Elan Valley (7.2.6). Section 7.3 continues the audit where each town has been examined under eight headings, which are: infrastructure (7.3.1), tourism superstructure (7.3.2), human resources (7.3.3), training (7.3.4), links to other sectors (7.3.5), festivals and events (7.3.6), coherent marketing and promotion (7.3.7) and branding (7.3.8). Section 7.4 is a discussion of the findings of the audit and section 7.5 discusses the conclusions.

7.1 THE COUNTY OF POWYS

7.1.1 INTRODUCTION

The principal communities in Powys are: Montgomery; Newtown; Llandrindod Wells; Llanfair Caereinion; Llanfyllin; Llanidloes; Llanwrtyd Wells; Machynlleth; Hay-on Wye; Brecon; Knighton; Builth Wells; Crickhowell; Presteigne; Rhayader; Talgarth; Welshpool; Ystradgynlais.

The county has acknowledged landscape assets - the mountains of the Brecon Beacons National Park; the rolling hills of Radnor Forest; the Berwyn Mountains in the north. Additionally, the county incorporates three river valleys: Severn, Wye and Usk.

PCC is the largest employer in Powys with some 8,000 staff working in several locations including the previous, now-constituent, shire councils: Brecknockshire; Montgomeryshire; Radnorshire. Powys is a large expanse of largely upland, extreme
rural terrain covering 2000 square miles - approximately a quarter of the area of Wales. The southwest and northeast extremities of the county are 83 miles apart. With only one person per ten acres (4 hectares) it is one of the most sparsely-populated local authorities in England and Wales (PCC nd a).

In 2006 the Powys population was 131,141 - 4.4% of Wales’s 2.96 million population (PCC 2003a). Natural decline due to deaths out-numbering births and out-migration of young adults threatens the sustainability of communities, although, due to net in-migration, the population increased by 6% between 1991 and 2001. Compared with rest of the UK, Powys has: an older age profile; fewer babies and very young children; a lower proportion of young adults; a higher proportion of both older working age and retirement-age people (the average age of the Powys population (2006) was 43 years compared with 41 in Wales and 39 in England and Wales (Research and Information Unit of PCC nd). Traditionally Powys experienced unemployment black-spots with marked variations between north and south which, despite recent improvements, secured Powys Objective 2 status.

A number of EU projects have been based on enhancing opportunities in Powys and led by Glasu - Powys’ LEADER + Programme. LEADER+ is a network of groups across the United Kingdom facilitating co-operation and exchange experiences across Europe (UKLEADER+ Network nd). The Glasu programme is charged with adding value to local natural products through innovation and sustainability and describes itself as a ‘laboratory’ for innovation sharing information across Europe to maximise benefit. Glasu is funded from the Welsh European Funding Office, the European Agricultural Guidance and Guarantee Fund, WAG and PCC. Glasu is involved with three key projects: Country Store, Energy and Waste and New Harvest. Country Store focuses on non-food natural products, e.g.: trialling strains of willow for willow-weaving;
commercially testing various herbs; investigating more sustainable building materials; using ground re-cycled glass instead of sand in plaster mixes. Energy and Waste also explores more sustainable approaches for Powys. New Harvest trials new food products for Powys (e.g. blueberries and shitake mushrooms), formulates new recipes (such as beetroot and carrot juice drinks) and explores new methods of distributing produce, e.g. 'vegetable box schemes' in collaboration with HLC to get reasonably-priced fresh produce to local people. The whole point of these projects is:

\[
\text{for farmers to add value to food production through branding and niche development}
\]

(Mid Wales Partnership 2007a: 2)

Alongside these projects, and in response to the new interest in the provenance of foods, there are five farmers' markets in Powys - Brecon, Rhayader, Llandrindod Wells, Knighton and Welshpool - held in permanent venues in each community - market halls, community centres and designated streets closed to traffic for the market. The markets enjoy the support of local communities and visitors to Powys who can buy various local products.

7.1.2 THE ECONOMY, EMPLOYMENT AND HEALTH INEQUALITIES IN POWYS

The WAG economic development strategy - A Winning Wales (2002) - stated that:

\[
\text{The way forward is clear, we need to increase the number of new and growing businesses in modern economic sectors, we need to modernize the industrial structure of the Welsh economy to ensure that Wales has a higher share of employment in high growth, high skill and high value added industries and occupations, and moves up from the assembly line branch factory economy.}
\]

(Welsh Assembly Government 2002a: 2.3.10)
This vision is reinforced in the *Wales: A Better Country* (2003) policy document:

Promoting a diverse competitive, high added value economy, with high quality skills and education, that minimizes demands on the environment.

(Welsh Assembly Government 2003: 3)

The underlying proposition of this thesis is that the development of a Spa and Wellness Trail in Powys is in line with the economic development policies for Wales and would be an appropriate focus for the regeneration of the former spa towns of Powys.

The Powys economy is largely based on agriculture and tourism. Self-employment, employment in small businesses and public-sector employment predominates. A key issue for Powys, affecting all aspects of health, social care and well-being, is that the average GDP is less than the rest of Wales and less than the GDP-average of Europe making Powys eligible for EU structural funding (PCC 2003c). The Powys Needs Assessment Report (PCC 2003b) shows that the agriculture and manufacturing sectors in Powys show continuing decline and that many businesses are tourism-related. There are low levels of registered unemployment across the county, except in Ystradgynlais, Machynlleth and Llandrindod Wells - Ystradgynlais and Llandrindod Wells are key nodes on the proposed spa trail. Diener *et al.* (2002:12) claims unemployment has 'deleterious effects on well-being', a view with which many others agree (e.g. Clark *et al.* (1994); DiTella *et al.* (2001). Among the worst 10% of Welsh wards for employment deprivation were Abercraf, Ystradfellte, and Ystradgynlais. The proportion of Powys residents with limiting long-term illness rose from 14% in 1991 to 20% in 2001, reflecting the rising average age of the population (PCC 2003b).

Low household incomes coupled with high living costs, especially of housing, housing repairs, food and heating, reduces disposable income and increases risk of housing deprivation, fuel poverty and food poverty for Powys residents. Disproportionate
expenditure relates to travel – for work, shopping or accessing services. Disproportionate time spent traveling results directly in loss of income and indirectly in additional costs, e.g. childcare. Public-service delivery costs to sparse population are also increased.

The Powys Needs Assessment Report (PCC 2003b: 3) describes the state of health, social care and well-being in Powys: ‘Powys is an extreme example of a deeply rural county impacting adversely on all aspects of health, social care and well-being’. One example of the result of health inequalities is in Ystradgynlais which is designated one of the 100 most deprived areas in Wales. As a consequence of the Healthy Living Centre (HLC) was established (see Figure 7.2) through lottery funding (see section 2.4) and is managed by members of PCC and the Communities First Programme. WAG’s Communities First Programme exists to provide local people with opportunities to be active in shaping the future of their community.

Figure 7.2: Healthy Living Centre Ystradgynlais (British Broadcasting Corporation (2002-2007))

The credo for the HLC is that health is more than simply lack of illness but is related to many extraneous issues - housing, education and income. The HLC is intended to promote health in its widest context and help people of all ages to maximise well-being. The focus is on ‘positive health’, allowing people to get the most out of life, through improving physical, social and mental well-being. The HLC offers specialist advice, support and training for many areas, including: children’s health, mental health, heart disease, cancer, drug, alcohol and tobacco abuse, depression and asthma. The centre
is well resourced and has two large teaching rooms that have modern teaching aids, plus a room with courses, including: body massage, Indian head massage, aromatherapy, reflexology and computer training, run in conjunction with Coleg Powys and networked with Learn Direct (enabling access to various e-learning courses) - 80 part-time students were enrolled in 2007. The HLC is located in a deprived area enabling the most needy to benefit. Funding is a problem year-on-year the centre is not self-financing and needs continual financial support to remain open.

Local Agenda 21 is being implemented through PCC’s ‘Local Futures’ initiative involving individuals from all sections of society identified as having a role in the sustainability agenda: young people, farmers, women, people working in businesses, charities and local government. The Local Futures process included the setting up of eight round-tables - each focussed on a particular aspect of everyday life: People and Communities; Housing and Shelter; Environment; Work and Recreation; Education and Information; Food and Farming; Health and Fitness; Transport. Further sub-committees were developed from the round-tables, e.g. the Healthy Lifestyles (Powys Health Alliance) sub-group which creates projects and influences policies for creating healthy lifestyles in Powys. It was originally responsible for the setting up the HLC and developing new approaches to the environment, the economy and society (PCC, 2003c). This is in line with the wider view of Mid Wales as:

> high-quality living and working in smaller-scale settlements set within a superb environment, providing dynamic models of rural sustainable development, moving all sectors to higher value added activities"

(Mid Wales Partnership 2007a: 2)

One important issue for Powys is to promote health awareness across the county. Leisure centres, which provide reasonably-priced access to sport/recreation activities for the general public, are an important part of this promotional strategy. Many of
Powys' leisure centres are linked to local high schools. They support an extensive range of sport and leisure activities as well as catering for private functions, concerts, local play groups, festivals, conferences and sports courses. Seven Leisure centres are located along the proposed Powys Spa and Wellness Trail, i.e.: Ystradgynlais; Sennybridge Sports Centre; Hay Pool & Gwernyfed; Brecon; Builth Wells; Llandrindod Wells; Rhayader. PCC's Strategy for Sport, Leisure and Recreation (2005-2010) (PSSLR) identifies leisure centres as vital to the quality of life, social well-being and the local economy with a mission:

To promote healthy lifestyles for people in Powys, through the provision and development of opportunities for participation in active sport, leisure and recreation.

(PCC 2005: 10.3)

These high-quality facilities could complement the health/spa tourism concept in Mid Wales exploiting commercial wellness programmes and linking with EU-funded healthy lifestyle, wellness, and spa programmes developed over time with other agencies in Powys. Gareth Oldham, PCC’s Sport and Recreation Development Manager, said he would ‘welcome any opportunity to engage in commercial fitness, wellness and healthy lifestyle programmes in the county for the indigenous population and for the visitor’. He continued:

active participation in physical activity leads to better health and well-being and to increase the number of people participating in such programmes would be welcomed’, and that ‘this fits in well with the council’s key objectives.

7.1.3 STRATEGY FOR EMPLOYMENT IN WALES (2004-2008)

A set of measures to support communities like Ystradgynlais has been developed by WAG: to stimulate the growth of businesses already based in Wales; to attract organisations looking to expand their existing operations to Wales; to encourage start-up business to locate in Wales. Three promotional videos support these activities -
Chapter 7: Case Study Powys

Locate in Wales - Business, Locate in Wales - Technium and Locate in Wales - Leisure (Welsh Assembly Government 2006). Additionally WAG offers two other services to prospective customers - financial services and pan-Wales land services. This latter service is run by a team of experts including surveyors, planners, engineers and technical support, with experience of developments in both urban and rural Wales. They will identify sites, resolve planning issues and, where necessary, organise compulsory purchase for commercial and large-scale residential projects. There are three designated sites in Powys, including one in Ystradgynlais. Additionally established businesses and start-up companies can get free impartial advice from Business Eye. Business Eye operates in three towns on the Powys Spa and Wellness Trail: Ystradgynlais, Brecon and Llandrindod Wells.

7.1.4 TOURISM STRATEGY: POWYS

The importance of tourism in Mid Wales is acknowledged by the regional and sub-regional tourism strategies for the area (see Chapter 1:4). The overall economic target of PCC for tourism in Mid Wales is to grow by 18% (£41M) by 2008, when the industry will be 'worth' £274M in today's values' (Locum Destination Consulting 2003:2.2). The tourism strategy states that economic growth is a key goal for the tourist industry; sustainability must be core to cultural, economic and environmental strategies to provide long-term benefit to Mid Wales. At an all-Wales level, WAG adopted the Wales Spatial Plan (WSP) in November 2004 with an agenda for investment in the sustainable future of Welsh communities over the next 20 years. There are three Spatial Plan Areas in Wales: Powys is included in the Central Wales Area.
Partners have been working together to take forward the vision and agreed objectives for the area to:

*Capitalise on the region’s outstanding and diverse environment, including its inland and coastal landscape, ecological and historic heritage and strong cultural identity to both build higher value sustainable tourism and create high value production opportunities for the sustainable future of the land based economy.*

(Mid Wales Partnership 2007b: 3)

Tourist, or Visitor, Information Centres (TVICs) advise on local attractions, transport and accommodation, and often stock a range of useful publications, leaflets and maps. Prior to local government reorganisation in 1996, TVICs were delivered through the District Councils either directly or by through intermediaries (e.g. Mid Wales Tourism). An alternative model in Powys is a community-run TVIC initiative providing services meeting operational standards set by WTB/VisitWales. In 1996 all 16 Powys TVICs became part of the new PCC. Since then budgetary constraints have forced PCC to review its support for tourist promotion to provide the best support for industry and the communities in which tourism is most important. The use of TVICs has to be weighed against other tourism promotion channels - annual brochures, the use of the Internet (PCC’s two web-sites: Explore Mid Wales and the Brecon Beacons) (see Figures 7.5 and 7.6) and attendance at tourism trade-events across Europe. At the time of writing Powys had TVICs in: Brecon; Builth Wells; Crickhowell; Elan Valley; Hay-On-Wye, Llanidloes, Llanwrtyd Wells; Machynlieth; Offa’s Dyke; Presteigne; Talgarth; Welshpool.

In 2003, Jeremy Wright, then Head of Economic Development in PCC, said:

*PCC has real difficulties in fulfilling its ambitions in developing tourism, principally from the restraints on the amount of money available to the service in the face of the competing demands on PCC’s budget. Whilst key to the long-term development for the county, tourism comes a poor second to the more immediate and pressing needs of education and social services. We have to adjust our approach to achieve a good long-term result. Put another way, we are using PCC money for leverage and pump-priming to release other resources - such as community action.*
He went on to say:

a key issue for community-developed TVICs is the sustaining of standards in presentation and quality. There is a reluctance to meet WTB standards, but a desire to have the support. The answer lies largely in flexibility – all information points do not have to be the same and every option – from a fully-staffed PCC-run centre to unmanned notice boards and leaflet holders - needs to be pursued as appropriate. Moreover, it is important to keep provision under constant review and adjust in the light of changing circumstances e.g. changing personnel at a community-run TVIC or changes in the tourism offer itself.

The Explore Mid Wales website (see Figure 7.3) offers a diverse and comprehensive range of features to prospective visitors to the region. The website includes an advanced search option with a 'virtual' tourist information centre this option allows potential visitors to download town plans, guide books and brochures. The site also features an excellent 'build your own' brochure feature, where it is possible to add accommodation; attractions; and activities to a bespoke brochure which can be converted into a pdf for download.

Figure 7.3: Explore Mid Wales website (PCC 2007a)
7.1.5 MINERAL WATERS OF CENTRAL WALES

The four historic spa resort towns in the proposed Powys Spa and Wellness Trail are: Llangammarch Wells, Llanwrtyd Wells, Builth Wells and Llandrindod Wells. For the purposes of this study it is important to ascertain the future likelihood of using spa water for commercial purposes. The supply of mineral water in Mid Wales has not been sustained by a programme of continuous development and is in stark contrast to the continued supply and use of waters in Europe as in the Auvergne. Moreover it is likely that the mineral waters that do exist would not pass any EU standards for human consumption. This lack of integrity in water quality may be a limiting factor in developing a spa trail as is recognised in Europe, but there are many other attributes in Powys that would facilitate the development of a legitimate Powys Spa and Wellness Trail. Moreover the Saint Malo case study in Chapter 5 emphasises that water per se is not an essential requirement to underpin the spa tourism concept.

It is important in the light of this failure to establish the types of treatment that would be both suitable and appropriate for treatments in the twenty-first century in Powys. Clearly the region is landlocked so the use of sea-water is not available for thalassotherapy treatments, however, a British Geological Survey of Mineral Waters in Central Wales for Radnorshire District Council (RDC) noted that 'it is likely that the Victorians' depended, as far as bathing were concerned, on artificial waters'. The report went further by saying 'we do not see a problem in using artificial waters based on the Llandrindod formulae'. The treatments used for wellness and remise-en-forme are based on spa treatments which according to the report have been perfected and modernised in France using similar formulas (Edmunds et al 1991:36).
The last survey on the waters of Mid Wales were carried out in 1991 following informal discussions in Llandrindod Wells on 23rd April 1991 between representatives of RDC, the Development Board for Rural Wales (DBRW) and the British Geological Survey (BGS). Tenders were invited and a contract was eventually awarded to BGS to carry out a detailed scientific investigation of the mineral waters of Central Wales. BGS carried out the main field work on the 9th and 10th July 1991 and subsequently produced a report: Mineral Waters at Llandrindod Wells and Central Wales Technical report WD/91/60C Hydrogeology Series British Geological Survey. The following information is derived from the findings and conclusions of the report (Edmunds et al 1991).

Eight samples were taken of various waters at Llandrindod Wells (Rock Park) and two at Llanwrtyd (Dol-y-Coed and Victoria Wells). Access at Llangammarch Wells on the first visit was impossible since the spa building was in a state of collapse and was partly obscuring the well, but on the next visit BGS successfully cleared the well and obtained a sample. The team found that the wells in Builth Wells had been recently filled in by private owners. The sources of mineral waters in central Wales lie on, or close to, two major structures: the Tywi lineament and the adjacent Welsh borderland Fault System comprising the Pontesford and Church Stretton lineaments, which can be traced from Shropshire to Carmarthen (see Appendix 7.1). The report presented five conclusions (10.1-10.5) and six recommendations (11.1-11.11).

The conclusions indicated that the Llandrindod Wells waters owed their unique quality to the discharge of saline water along the line of the Rock Park fault and was best represented by the Chalybeate Spring. The saline water has arisen from deep circulation of meteoric water via the relatively-permeable volcanic rocks of the Builth Inlier. This in turn has probably mixed at depth with ancient saline water before rising along fault(s). The report concluded that a mean residence time of several thousand
years is possible for this water. The recommendations of significance for the purposes of this case-study state that since the natural flows of saline water in the Rock Park are low it would be impossible to develop the springs themselves to yield the quantities of water necessary for commercial usage. Any development of Llandrindod Wells must therefore depend, as far as bathing and spa treatments are concerned on artificial waters (recommendation: 11.1). The report (recommendation 11.4 -11.6) continues:

the historical and scientific attributes of the spa could be developed in the context of a theme park in which the mineral waters feature strongly and could proceed either as an independent venture to improve the amenity value of the Rock Park site, or to form an integral aesthetic part of a commercial development of a treatment centre.

Also of interest is: 11.6 which states:

as far as the waters for a commercial venture are concerned we do not see any problem in using artificial waters based on the Llandrindod formula, this is possibly what the Victorians did. There was unlikely to have been sufficient volumes of saline water in those days to meet demands and blended waters probably were used (natural or artificial).

(Edmunds et al 1991:46)

Indeed, the report asserted the advantages of using an artificial formula, since the high iron and manganese concentrations (which would be discoloured) of the natural sources would be difficult to manage. Additional recommendations for other Powys sites were as follows:

RECOMMENDATIONS

THE LLANGAMMARCH SITE (well) should be properly protected so as to preserve the mineral waters. There is scope for a small bathing establishment linked to Cammarch Hotel (see page 61) if sufficient volume exists. (However, there is a caveat which warns that there is high barium, iron and manganese content which might require treatment prior to use) (see Figure 7.4).
Figure 7.4: The Wells at Llangammarch Wells site opened in 1988

**LLANWRTYD (DOL-Y-COED)** was considered the most attractive of the Welsh spa sites since the mineral water is well contained and the flow is considered as reasonable. The recommendations show that there is scope for a bathing establishment linked to the existing site at Victoria Wells.

**LLANWRTYD (VICTORIA WELLS)** offers scope for development for mineral water bottling. It has a good name and historical associations. The quality of the water is also excellent as a possible table-water.

**BUILTH WELLS** is no longer accessible, but steps should be taken to re-discover the saline source (the highest in Central Wales) and to assess its use in modern terms. The report asserts that attempting to rediscover the source is important to give credibility to the name of the town.
7.1.6 TWENTY-FIRST CENTURY ATTEMPTS TO REVIVE THE EIGHTEENTH CENTURY SPA INDUSTRY OF POWYS

Since 1942 the wells and spa resorts of Powys have ceased to operate and function for the purpose they were built. There have been three attempts to revive spa interests in Powys all of which centre on the Grade 2 (1868) Listed building: Rock Park Spa Llandrindod Wells, which is a historic spa building complex including historic treatment rooms, houses, and a restaurant which is located in the old pump room (see Figures 7.5a and 7.5b), the building is currently leased from PCC to Llandrindod Wells Spa Town Trust. The first re-emergence of interest was in 1988 when the Llandrindod Town Spa Trust, Radnorshire District Council, (RDC), Brecknock Borough Council (BBC), Welsh Development Agency (WDA) and Coleg Powys were involved in several European projects (1988-1993), to look at innovative ways of exploring the potential of the spas in Mid Wales. However, these projects did not result, at that time, in any successful spa re-development programmes (see Chapter 1). The Director of Planning and Architecture for the then Radnor District Council (1989-1996), Mr. Jeremy Wright explained:

The reasons for this failure were several, but the principal reason was that the offered level of intervention through any European scheme was too low to make any capital scheme viable for local authorities whose capital budgets were already significantly overloaded. As an Objective 2 area, Europe will only offer 30-40% contribution to approved works on an approved scheme that meets all the relevant criteria of the programme and at the same time offers trans-European partnership and transferable and innovative ideas and technology. This is too difficult for bodies that are using already scarce capital resources to meet myriad demands in a changing and uncertain domestic environment. European success is not sufficiently tangible or realisable to make it an attractive political ambition at this time, no matter how laudable the long-term opportunities offered.

The ambition for a centre offering bathing facilities with spa treatments was not achieved; however, the Town Trust established treatment rooms and a receptionist to
facilitate appointments for alternative health practitioners to practice in the Rock Park Centre.

The second attempt occurred in 1995 following the renovation of the old Rock Park Centre through grants obtained from the WTB, RDC and the Llandrindod Wells Town Council in the original grade 2 listed buildings. The Rock Park Centre is leased from PCC to the Llandrindod Wells Spa Town Trust for 28 years (1995-2023) which allows the trust to be in full control of the operation. A chairman leads the issue of funding of the trust, there are 10 registered directors and currently 12 members who have equivalent rights to the directors, but are not registered; any interested person is entitled to be a member of the Trust. The Centre has a full-time salaried secretary/receptionist and two treatment rooms which are rented out to 12 therapists who offer a range of treatments that including: acupuncture; allergy testing; aromatherapy; counselling and psychotherapy; environmental and nutritional therapy; homeopathy; kinesiology; massage; medical herbalist; osteopathy; reflexology; remedial massage; sports therapy; surgical chiropody.

Conditions set out by the Trust include: all practitioners being interviewed by a 4-member panel of the Llandrindod Wells Spa Town Trust which includes a retired medical general practitioner (GP). All business conducted must be for the benefit of the
community and is therefore non-profit making. The Trust does not offer a product but rather acts as a service to the local community and the tourist trade by providing a multi-functional organisation to promote:

- Health and Fitness through the Complementary Centre and Lifestyle group based at the Rock Park Centre;
- A Heritage Restaurant situated in the old Pump Room (adjacent to the Rock Park Centre) where the restaurant presents home-style cuisine and acts as a tourist attraction;
- The work of the ACTION TEAM, which is a pressure group set up to drive the social-economic development of the town with projects that range from playground improvements to action a regeneration plan for the town devised by PCC.

On Wednesday 26th February 2003 a meeting was set up by the author with Michiel Blees (the Llandrindod Spa Town Trust co-ordinator heading an action team charged with the responsibility of rejuvenating the ancient spa town). One of the proposals was to set up a project called ‘Life-style’ in the Rock Park Centre. The idea was based around four therapists forming a team to promote health and well-being through complementary and holistic treatments offering a limited range of therapy treatments (massage therapy) and giving nutritional and dietary advice combined with exercise programmes. The aim of the scheme was to provide a more flexible service both in and out of the centre by serving the local community and tourists to the area (such as walkers, pony trekkers, cyclists and sports people attending the many sporting events in the area (e.g. the Welsh Two Day Enduro – the biggest Motor cycling event of its kind in Wales). This more flexible service was designed to improve on the current facilities where treatments had to be pre-booked for the day-time (09.00-17.00) with no week-end or evening facility available. The ‘Lifestyle’ project was launched in August
2004 but closed after its second week primarily, in the first instance, because the other practitioners in the centre objected to not being included in the scheme. In October 2004 Mr. Blees explained that (in his opinion) the project had failed principally because:

- The management lacked experience in running an operational spa;
- They concentrated on trying to make the project work with complementary therapies and not pampering treatments;
- The programme was not marketed;
- The staff did not have a wide range of skills, such as holistic therapy, spa therapy, reflexology, aromatherapy and beauty therapy.

The Llandrindod Wells Spa Town Trust views the current arrangement as Phase 1 of the 'Spa Project' to be followed by Phase 2 which would involve: the re-instatement of the modern-day equivalent of taking the waters – Hydrotherapy. To complete this phase the Llandrindod Wells Spa Town Trust is looking to attract a suitable developer. The Trust has commissioned a development brief prepared by consultants which is available to interested investors, who may be able to invest £2 - £3 million in partnership with PCC. The aim would be for the partners to work together towards securing development grants. When the phase is complete the Trust hopes that eventually the premises can be opened at weekends as well as in the evenings (Rock Park Heritage Centre nd). There is currently very little activity at the Rock Park Centre and many of the former of the spa patients now receive holistic therapy treatments at Coleg Powys. As a consequence of this failure, and unlike their French counterparts, the Powys spas in the twenty-first century retain a largely redundant spa infra-structure.

On March 15th (2000) Nick Bourne: (National Assembly Member for Mid and West Wales) tabled a question regarding Llandrindod Wells's urban regeneration programme and asked if the programme would be put in place. The answer was given by Peter
Law, WAG’s Assembly Housing Secretary (1999-2000), on the WAG website which publishes answers to oral questions not reached in Plenary, in this case on March 15th (2000).

- **Q8 Nick Bourne:**
  
  Will Peter Law state if programme of urban regeneration will be put in place to regenerate the derelict parts of Llandrindod wells (OAQ4142)

- **Peter Law:**
  
  The needs and priorities for the regeneration of local areas are best identified by local partnerships of key players from the public, private and voluntary sectors alongside the local community itself. I am aware that a partnership involving PCC the Welsh Development Agency (WDA), Mid Wales TEC and Menter Powys, is actively involved with the town Council, the Chamber of Trade and the Llandrindod Wells Spa Town Trust in developing a town revitalization programme for Llandrindod Wells. The programme will include tourism initiatives, traffic management, environmental improvements, marketing and promotion of town skills development and several business development activities aimed at enterprises in the town centre. Financial support in Wales’s rural; towns are available from Assembly budgets, such as the new local regeneration fund, relevant European funds and the WDA.

  (Welsh Assembly Government 2000)

During March 2003, PCC in partnership with the WDA, Llandrindod Wells Spa Trust Action team, CADW: Welsh Historic Monuments and a number of other local organisations made an application to the Heritage Lottery Fund to support a Townscape Heritage Initiative (THI) scheme for Llandrindod Wells. In order to protect any investment in the town’s buildings, the Lottery Fund requested that a Regeneration Strategy for the Llandrindod Wells area accompany the bid which set out possible projects and actions for helping to regenerate the Llandrindod Wells area. The framework consisted of 16 actions in total. One action specifically sought to actively support the notion of health/spa tourism as a major regeneration strategy for the town and to increase the appeal of the town centre to visitors and tourists by diversifying the range of shops by:
Action: S4.
- Expanding financial assistance to ventures that contribute to developing health/spa tourism, including shops, cafes and restaurants.
- Providing local retailers with training and advice on customer care and business management.
- Actively promoting Llandrindod Wells as an investment opportunity to national (and international) health and beauty-related retailers, reinforcing the spa town image.

Action: 15.
- Provide assistance to prospective inward investors, through the Spa Town Trust, in promoting Llandrindod Wells, in finding premises, recruitment, access to grants and loans.

(PCC 2003:27)

7.2 AUDITING THE SPA TOWNS OF POWYS

7.2.1 YSTRADGYNLAIS AND DISTRICT
The town of Ystradgynlais is the gateway to the Powys Spa and Wellness Trail (situated 12 miles from the M4 motorway). Within close proximity to Ystradgynlais are a group of communities: Abercraf; Cwmtwrch (Upper and Lower); Cwmgledd; Glanrhyd; Gurnos; Penrhos, with a total of about 8,200 inhabitants. Ystradgynlais is the largest community in the group (Ystradgynlais Town Council Wards 2000). Ystradgynlais and District developed as a result of the coal-mining and steel-making industries (see Chapter Two) which went into decline through the 1970s with all the mines closed by the end of the 1980s. Towards the end of the 1990s, the valley lost another 1500 jobs when Lucas SEI and Dewhirst plants closed. Job losses in the petrochemical industry further south also impacted upon the community.

The problems of the area (see Chapter 2) are evident - low economic activity; high unemployment, high rates of long-term illness, outward migration of young people
seeking opportunities further afield and the scars of a post-industrial landscape. In 1999, as the Lucas SEI plant closed, the Amman and Swansea Valleys Regeneration Partnership was formed to regenerate the community. From this partnership came the Ystradgynlais Communities First Partnership. Its objectives were:

To promote and strengthen the economic, social and environmental regeneration of the community of Ystradgynlais and the Upper Swansea Valley

Communities First Ystradgynlais (2007:2).

The partnership also set further sub-objectives:

- Build the confidence and self-esteem of those living in the community and develop a “can do” culture.
- Encourage skill-training for work.
- Create job opportunities and increase the income of people in the Community.
- Promote the improvement of housing and the surrounding environment.
- Promote health and well-being through an active and healthy lifestyle and by addressing a range of issues that affect people’s health.
- Make the community a safer and more secure place in which to live, work and play.
- Encourage sports recreation and foster cultural and recreational facilities.
- Foster and develop a partnership approach to tackle all of the above objectives.

(Communities First Ystradgynlais 2007:3).

Ystradgynlais is the gateway to some of the most dramatic and unspoiled scenery in Wales in an area dominated by the Black Mountains. While Ystradgynlais does not have a history of spas, it has to a large measure depended on the influence of water for its past and present existence. The River Tawe which runs through the town has allowed heavy industry to prosper: woollen mills, collieries, and iron smelting works have enjoyed the town’s plentiful commercial water supplies.

Today it is enjoying the benefits of its water and exploiting it through new markets: locally-sourced mineral water bottling plants, creating tourist attractions which depend on the water resources: waterfalls, country caves, potholing and reservoirs.
Ystradgynlais is a market town but its history is not linked to agriculture as the rural setting would suggest, but with the industrial age it was the home of some of the first Welsh ironmasters with evidence of smelting reaching back to the reign of Elizabeth I. The old Ystradgynlais and Ynyscedwyn iron works estate (see Figure 7.6a) emphasises a time when the prosperity of the town was forged with the ironworks and the Wern Plemys Colliery where anthracite was both mined and burned for the first time. Iron-making ceased in 1941, Ynyscedwyn Ironworks Park has been created on the site of the old works the arches and preserved machinery (see Figure 7.6b) are all that now remain.

The site of Wern Pemlys colliery has also been reclaimed for modern post-industrial use, and is now a nature reserve which consists of three wildflower meadows and a large area of woodland which is run by the Brecknock Wildlife Trust.

### 7.2.2 BRECON BEACONS

Brecon is both a Cathedral and Market town with a population of 7,500. The town is set in an Area of Outstanding Natural Beauty (AONB) which has a National Park situated below the Brecon Beacons. The character of the town reflects its mediaeval origins and retains its 11th and 12th century street pattern. Much of the architecture of the
town is 18th century Georgian, with over 500 protected buildings in the town centre; it is
the administrative centre of the 519 square miles of the Brecon Beacons National Park.

The Brecon Beacons National Park was established in 1957, under the National Parks
and Access to the Countryside Act of 1949. It was the tenth area in England and
Wales to be given such status. The park measures 15 miles from north to south and 45
miles from west to east, comprising four mountain ranges and a variety of terrain (see
Figure 7.7).

Figure 7.7: Map Brecon Beacons National Park (Brecon Beacons Park Society nd)

In recent times a new theatre has been built in the town and in the twenty-first century
the town has developed an international reputation for its annual Brecon Jazz Festival
(see Section 7.3.6).
7.2.3 LLANGAMMARCH WELLS

Llangammarh Wells was a purpose-built spa town resort which focused on a barium well (now closed). It is situated eight miles west of Builth Wells and sits at the junction of the rivers Cammarch and Irfon. Today the area of Llangammarch Wells and the nearby villages of Cefngorwydd and Tirabad has a total population of 475 in (Directgov 2005). The old spa town is now classed as a village and is overlooked in the south-east by the Mynydd Eppynt which rises abruptly to over 400 meters and is frequently used by the British Army for training purposes (see Figures 7.8a and Figure 7.8b). Today the village is popular with tourists for salmon and trout fishing (on the rivers Wye and Irfon) and pony-trekking.

Figure 7.8a: Centre of Llangammarh Wells (Picture taken from Saint Cadmarch Church)

Figure 7.8b: Centre of Llangammarh Wells (Picture taken from Saint Cadmarch Church)

Llandrindod Wells had the most prestigious reputation of the Powys spa resorts and catered for the prosperous and fashionable. This was in contrast to the other smaller Mid Wales spa resorts of Llangammarh Wells, Llanwrtyd Wells and Builth Wells which attracted miners and steelworkers and their families from the valleys of South Wales (Victorian Powys for Schools, nd a).
7.2.4 LLANWRTYD WELLS

Llanwrtyd Wells was developed as a traditional health resort and spa which was based around the Ffynon Droelwyd spring, which like the railway station still exists. The town reached the height of its popularity as a Victorian spa resort for manual workers from South Wales around 1890 (See Figure 7.9). Today Llanwrtyd Wells is recorded as the smallest town in the UK (PCC 2003a) it has a population of 649 (Directgov 2005).

Figure 7.9: Curistes at Llanwrtyd Wells Spa Resort circa 1895 (Victorian Powys for schools, nd b).

Dolecoed House (See Figure 7.10a) was located close to the Dolecoed well and the Dolecoed park where the main spa activity took place. The spa water produced at the Dolecoed well was almost pure sulphur-water with very high levels of sulphurated hydrogen. When the rate of flow was measured it was found to produce around 4,500 gallons a day. The sulphur water came out naturally, and was not stored; supplies were thought to be almost unlimited (Victorian Powys for schools, nd c). The source was sealed in Victorian times in a massive round marble pedestal which was decorated with mosaic stones (see Figure 7.10b).

Figure 7.10a: Dolecoed House Llanwrtyd Wells circa 1890 (Victorian Powys for schools, nd)

Figure 7.10b: Marble Pedestal: Sealing Source of Sulphur Water (Victorian Powys for schools nd c)
The purpose of sealing the source was to prevent the loss of natural gases produced in the well which were thought added to the goodness of the water. There was a thick glass top to the tank and visitors could see the gas bubbling through the water in an angled mirror placed above the well. The sulphur water was fed through ebonite pipes under natural gravity to the baths in the Dolecoed Hotel, where it was heated to the required temperature for medicinal purposes. The temperature gauges governing the thermal flow to the baths ensured that any required temperature could be prescribed without altering the therapeutic powers of the mineral water. The Dolecoed Pump Room also offered water from the Chalybeate Spring, a spring providing water containing iron salts, which unlike the sulphur water had no smell.

7.2.5 BUILTH WELLS

Builth Wells grew as a traditional Welsh market town with fine buildings and examples of architecture built in the late 19th century when the discovery of healing waters elevated it to 'spa' status. The town is well-known nationally as the location of the Royal Welsh Showground which is home to the Royal Welsh Show (RWS). The population of Builth Wells is: 2,352 (Directgov 2005). The town is surrounded by hills and has a six-arched bridge originally built in 1779 and widened in 1925, it crosses the River Wye not far from its confluence with the Irfon. The river marks the boundary between the old counties of Breconshire and Radnorshire (see Figure 7.11).

Figure 7.11: Builth Wells Bridge (Builth Wells, nd)
Builth Wells developed as a traditional health resort and spa and followed the fashion for taking the waters at the inland spas of Mid Wales and like the other Mid Wales spas reached the height of its popularity as a spa resort at around 1890. The following pictures show early 1900s hand-tinted memento view-postcards from a range of prints published by Newman and & Co (1900) which were printed for holiday visitors to Builth Wells. Figure 7.12a shows Glanne Wells Pump House circa (1900) which is the pump room at the mineral water spring of Park wells. Figure 7.12b shows the boathouse on the riverside area known as the Gro (or Groe), The Builth Wells Tourist/Visitor Information Centre (T/VIC) now stands on this site.

One of the healthy outdoor activities for curistes when taking the waters was hiring rowing boats on the river Wye. Like the rest of the spa activity in the town, this opportunity no longer exists.

7.2.6 LLANDRINDOD WELLS AND THE ELAN VALLEY RESERVOIRS

Llandrindod Wells is positioned on a mountainside and was purpose-built in the eighteenth century as a traditional health spa resort. The town was known as 'the 18th century watering place', for good reason as it has four different mineral springs: sulphur; saline; magnesium; chalybeate, in several sources throughout the town. The beneficial effects of taking these waters was known to the Romans who occupied a
settlement in the area known as Castell Collen (AD43), which is on the perimeter of Llandrindod Wells and is today an acknowledged Roman site (Anon 2005a).

The major development of the town occurred between 1865 and 1914 as the taking of the waters became a fashionable part of Victorian Britain. During this period twelve hotels and boarding houses were built and the town like its counterparts in the Auvergne developed walkways with shops and amusements between the sources of the mineral springs where curistes could be entertained in newly-built ornamental gardens. The building of the town was prolific and included: new spa treatment centres; two pavilions; a golf course and bowling and putting greens; and a 14-acre boating lake. These facilities catered for as many as 80,000 visitors a year in 1880 (Anon 2005a) (see Figure 7.13).

![Figure 7.13: Llandrindod Wells (BBC - British Broadcasting Corporation Wales/Mid 2002b)](image)

Today, not unsurprisingly, the townscape is of Victorian architecture: turrets, towers and ornate ironwork, which is well preserved and reflects the heyday of the town. The population of Llandrindod Wells is 9,403 (PCC, 2003a) and is successful as a conference centre due to its central (in Wales) geographic location.
In 1880 Radnorshire County Council established its offices in the town making Llandrindod Wells the county town of Radnorshire. In the twenty-first century the town is the administrative centre of PCC. The newly-built headquarters of PCC was built on the site of the Pump House Hotel (see Figure 7.14a) which opened around 1870 to cater for the increasing number of visitors able to travel to the resort by the then newly-developed rail link. The hotel was initially converted for office use by local government and finally demolished to make way for new PCC offices in the 1980s (see Figure 7.14b).

Figure 7.14a: Pump House Hotel: Llandrindod Wells (1905) (Powys County Archives Office, nd c)  
Figure 7.14b: County Hall Llandrindod Wells Photograph by Ruth Hargest 2003) (Powys County Archives Office, nd c)

Llandrindod Wells as previously mentioned has a long spa history; the following information of the town was sourced through the Radnorshire Literary Society Transcripts and the literature of Yeo (1904), Luke (1919), Morton (1932) and Edwards (1992). The first local documented discovery of the springs of Llandrindod Wells was in 1732 when a Mrs Jenkins re-discovered saline spring waters and waters from a sulphur well on her tenanted farmland and used these waters to cure her daughter’s ulcerated head she later became well-known for curing the ailments of local inhabitants. Two articles published in the 18th century drew these waters to the attention of a wider public, the first in a Gentleman’s Magazine (1748), the second featured in: A Journey to Llandrindod Wells in Radnorshire (1747), both articles raised awareness to the efficacy of the mineral waters available in Llandrindod Wells. This position was further enhanced when a scientific treatise on the waters was published in 1756 by Dr.
Diederich Wessel Linden, following the publication many visitors came to the town seeking a cure for their ailments. Some of the farms which bordered the site of the wells, together with a local hostelry; the Llanerch Inn, provided some basic accommodation to support the new visitor population, this situation continued until 1749 when a deserted farmhouse known as Llandrindod Hall was converted into a hotel. The hotel was described in 1749 by William Grosvenor of Shrewsbury as the 18th Century Watering Place in which he found:

*here were accommodation for the invalid of whatever rank and distinction, field amusements for the healthy...balls, billiards and regular assemblies varied the pastimes of the gay and fashionable.*

(Llandrindod Wells and District Chamber of Trade, nd a)

The hotel established itself as a resort for the healthy and infirm alike and was filled with visitors from Easter to November every year until the late eighteenth century when fashions in health-care changed and sea-bathing was seen as a new and efficacious health cure. At that time Llandrindod Wells in line with other inland British spa resorts fell into sharp decline, as a result the Llandrindod Hall Hotel fell into disrepair and eventually burned down before the end of the century and a farm, which still stands, was built on the land. Small amounts of visitors continued to frequent the town during the 19th century, but it was not developed in any serious way due to the town's isolated geographic position and the lack of a suitable building site.

During 1862 two factors brought a change in the fortunes of the town, first, when an Act of Parliament was sought to enclose common lands in the area, (the new common land was divided among local landowners leaving land for foot-paths, roads and recreation areas). Second, the construction of the Central Wales Railway line (1839-1868), this new development offered a direct link to the north west of England, the Midlands and South Wales, (Archives Network Wales (nd b). Thirty acres of land from the Rock House Estate was purchased by the town to develop a park around one of the main
sources of water and in 1867 and a further spring was discovered on this site which prompted the building of a pump room and bath house to be erected near the source. The surrounding land was laid into formal gardens and was named the project was named the Rock Park Centre (Poskitt, 2003), (See Section 7.1.6; Figure 7.8 and 7.9). The Rock Park Centre is located between the southern edge of the town and the River Ithon, the springs flowing from the Spa were referred to by the Romans as Balnes Siluria which translates as the Baths of the Silurians. The shortest course of treatment available in the spa was usually three weeks and required the patient to drink a combination of waters during the course of the day. Typically this would be saline water before breakfast, sulphur water at mid-day and mid-afternoon and concluding the treatment with a drink of chalybeate after the evening meal and before retiring. Curistes were required to take exercise by having constitutionals (leisurely walks) in between the prescribed taking of the waters, (which had a cost of 6d per day to be taken as prescribed) (PCC nd a). Morton (1932:12) described Llandrindod and the Rock Park Spa thus:

*It is a spa set in a garden. Nature has shot up its medicinal waters in a rustic glen; wisdom improved and cultivated the surroundings. I went to the pump room and tried a glass of saline, which I thought pleasant and just the sort of thing a doctor would offer when there is nothing seriously wrong with you....I was interested in the spa's most recent measure, one of the latest and most expensive X-Ray outfits in the country. You stand behind a kind of screen, there is a flare of light and those on the other side of the screen can see through your head or any other part of you.*

Figures 7.15a and 7.15b show patients in the 1930s receiving the type of electrical therapy Morton refers to for rheumatic disorders. Many of these treatments were in fact found to be highly dangerous and were discontinued.
The Rock Park Spa is the only surviving spa in Powys and the raison d'être of any links Llandrindod Wells has to a future spa development. Currently the only waters available from the Rock Park Spa are from the chalybeate spring via a fountain (see Figure 7.16). The Llandrindod Wells Spa Town Trust are restoring the Spa and Pump House buildings in the Rock Park and have recently completed the initial restoration of the Pump House which is now a conference facility with one conference room seating 45 and a break-out room (see Section 7.1.6).

From Llandrindod Wells it is 10 miles to one of the oldest towns in Mid Wales which dates back to the 5th century. Rhayader is the gateway to the Elan Valley Trail which is an impressive route from the town centre (see Figure 7.17) leading to the flooded Elan Valley Reservoirs (see Figure 7.18). The Elan Valley Reservoirs were built to provide water for the people of Birmingham on the Elan Valley Estate which is owned by Dwr Cymru (Welsh Water), and mostly vested in the Elan Valley Trust Charitable Trust.
Dwr Cymru is committed to furthering the conservation of the environment as well as protecting both natural and archaeological heritage and promoting access and recreation at their sites (Dwr Cymru Cyf 2008). The dams and reservoirs of the Elan Estate are situated within an area of outstanding scenic beauty. There is a 13km (8mile) Elan Trail - a cycle trail running from Rhayader through scenic countryside around the Elan Valley reservoirs.

7.3 AUDITING THE POWYS SPA TOWNS

7.3.1 INFRASTRUCTURE

It is axiomatic in public expenditure on infrastructure - road, rail and telecommunications - that investment is made where the perceived cost / benefit is highest. In Mid Wales, the absence of large centres of either population or significant employment has meant that infrastructure investment has lagged behind. There is no motorway access to Mid Wales: the principal routes are long established (A 483 Ystradgynlais to Shrewsbury, A44 Hereford to Aberystwyth, and A470 Cardiff to Llandudno) and whilst they are designated trunk-roads and subject to maintenance by WAG rather than the LA, they are not dualled and driving times are much extended by scenic, but twisting, roads. Ystradgynlais is probably the easiest town to access on the spa trail as it is only 16 miles from the M4 motorway via the A4067, which has been improved over time with the road rerouted to avoid settlements up the valley so
improving journey times considerably. It is 24 miles to Brecon from Ystradgynlais via the A4067 and A40 from Sennybridge. Brecon’s nearest railway link is in Abergavenny which has a direct service to Cardiff and Manchester - all other services require change at Newport or Shrewsbury. The route from Brecon to Llangammarch Wells winds over the dramatic scenery of the Epynt, but is a time consuming journey via the B4591 and unclassified roads. The A483 links Llanwrtyd Wells to Builth Wells (13 miles). The A483 links Builth Wells to Llandrindod Wells (7 miles) and from there, the Elan Valley reservoirs are reached via the A483 / A44 and the B4518 (16 miles).

In recent times investment has been based on existing characteristics and projected volumes, which for Powys means that the investment is at the lowest acceptable level. Investment is done largely through political lobbying which is not based on direct need, but rather on political equity. The political make-up of Powys does not reflect national party politics and so the collective potential influence of local politicians is much reduced. PCC has acted with the local airport operator of a small former wartime airfield currently used for light-aircraft, near Welshpool in the North of the county to secure EU funding as well as its own to extend the runway to make it capable of handling larger aircraft giving local industry and others direct access to Europe, at the time of writing the air operator is unsure if the extension will happen.

Powys’s low population density challenges the viability of its information and communications technology infrastructure. However, despite this in 2000 MLL Telecom installed a wireless regional communications backbone network to Ceredigion, Carmarthenshire and Powys enabling affordable high-speed, internet access, and a platform for delivering services regionally and creating economic and social development opportunities and higher-qualified, better-paid jobs to locate to an area traditionally dependent on low-paid work in agriculture and tourism. Powys’s Head of
Economic Development, Jeremy Wright, commented that the issue for Mid Wales was to secure a recognizable level of quality in the product it offers and suggesting that:

While everyone would agree that the environment and landscape in Powys are world class, the tourism infrastructure is often let down by: poor accommodation, under-investment in attractions and frequent experiences of indifferent hospitality, particularly in relation to offering food.

Similarly, as farming declines, the aim of any investment strategy geared to commerce and industry must be to offer the opportunity for higher-paid quality jobs rather than volume lower-paid jobs that may be the target of urban areas facing similarly-changing patterns of employment.

The Central Wales Railway was extremely important in the establishment of the spa towns:

Though many places along the route had been famed for their healing waters since the early part of the seventeenth century, it was the coming of the railway which established the spa townships, though the modern railway has dropped the 'Wells'suffix from Llandrindod, Llangammarch and Llanwryd stations in present-day timetables

(Heart of Wales Travellers Association 2007)

However the line closed in the 1960s following Dr. Richard Beeching’s report: The Reshaping of British Railways (1963) in response to the Government’s attempt to reduce the cost of running the UK rail system. Parts of the old Central Wales line now forms the much-reduced service known as the Heart of Wales Railway line - a single track running from Llanelli to Craven Arms with four trains a day. The line has stations in each of the historic spa towns of Powys, but does not link with Brecon or Ystradgynlais (see Figure 7.19).
Arriva Trains Wales's train service has the franchise for running the service between Swansea and Shrewsbury stopping at Llanwrtyd Wells, Llangammarch Wells, Builth Road (serving Builth Wells) and Llandrindod Wells (Travel Search 2008) (see Figure 7.20).

Following the introduction of the Traws Cambria bus service in 2006 it became possible to travel between Newtown and Brecon with connecting services to Shrewsbury, Cardiff, Abergavenny and Llandovery every two hours. Using the Travel Line web-site (see Figure 7.21) it is possible to plan complicated journeys on-line.
The area is well-provided with small cottage hospitals at Ystradgynlais, Brecon Builth Wells and Llandrindod Wells. There are Secondary schools at Ystradgynlais, Brecon, Builth Wells and Llandrindod Wells (Estyn 2004).

7.3.2 TOURISM SUPERSTRUCTURE

TOURIST ATTRACTIONS

The region has a diverse range of tourist attractions including: the Henrhyd Falls; Craig-y-Nos Castle and Theatre; Craig-y-Nos Country Park and Visitor Centre and the Dan-yr-Ogof Show Caves near Ystradgynlais; Brecon Beacons National Park; Black Mountain Activities; The Black Mountains Gliding club; Llangorse Lake and Common; The Llanwrtyd Wells Cambrian Woollen Mill and visitor centre; Monmouthshire and Brecon Canal; Brecon Cathedral; Theatre Brycheiniog; The South Wales Borderers Museum; Wye-side Arts Centre; Builth Wells Golf Club; Llandrindod Wells Spa Walks: Lakeside; Albert Hall Theatre; Porticus Art Gallery; Radnorshire Indoor Bowling Centre; Llandrindod Wells bowling club; and National Cycle Exhibition housed in Llandrindod Wells.
YSTRADGYNLAIS

Three miles from Ystradgynlais is the Henrhyd Falls (see Figure 7.22) where it is possible to walk behind the highest waterfall in the Brecon Beacons National Park with a drop of 27 metres. The Henrhyd Falls are particularly spectacular in cold winters when extensive icing occurs and this, like the other attractions, offers year-round fitness opportunities which are organised and run by Craig-y-Nos outdoor activity centre (Craig-y-Nos Castle 2005).

Craig-y-Nos Castle, which in translation means Rock of the Night, is four miles from Ystradgynlais on the edge of the Brecon Beacons. From 1879 until 1919 it was the home of Madame Adelina Patti a world-renowned opera singer who for 25 years sang by private invitation for Queen Victoria. She regularly entertained the rich and famous of the era at the castle, including many of the crowned Kings and Queens of Europe, Edward VII visited when he was still Prince of Wales. Today (2008), the castle is a major tourist attraction in the area with a restaurant, high-quality hotel facilities, accommodation and a Grade One listed theatre (See Figure 7.23). The Craig-y-Nos Patti theatre holds 150 people and is home to the Opera School Wales which provides pre-vocational training for young professional opera singers.
In 1976 the Brecon Beacons National Park Authority turned the grounds of the castle into a country park which attracts 73,000 visitors per annum. The centre has information and displays about the industrial and social history of the area, the geology of the nearby Cribarth Mountain and the walking areas available to the visitor around the extensive grounds of the Park.

The Dan-yr-Ogof National Show-cave Centre for Wales is situated on the borders of Ystradgynlais and the Brecon Beacons and attracts around 90,000 visitors per annum. The caves are the largest complex of their kind in northern Europe. The site offers a range of tourist attractions and boasts 22 major tourism awards, which include Wales Tourism Award and the Prince of Wales Award for Tourism and was nominated Visitor Attraction of the Year Award (2000) (The National Show caves Centre for Wales 2007). The caves are situated in a valley which is flanked by mountain ranges of 2300 feet and 2600 feet, amid country-side which lends itself as a starting place for walks.

**BRECON BEACONS NATIONAL PARK**

There is a wide variety of outdoor activities available in the Brecon Beacons National Park: which include: walking, cycling, pony-trekking, golf, motor-sports, fishing, climbing, sailing, wind-surfing, hand-gliding and para-gliding and clay-pigeon-shooting lessons. Also in the National Park is Black Mountain Activities which was established
in 1992 as an all-year centre situated on the banks of the River Wye. The centre is run by an outdoor-pursuits company and offers a range of activities: climbing, abseiling, caving, pot-holing, gorge-walking, kayaking, canoeing, white-water-rafting, orienteering, mountain-biking and archery. The park also houses the Black Mountains Gliding club which is based at Talgarth airfield which is 970 feet above sea-level to the west of the town of Brecon. The club is considered unique in British gliding, as the location offers more ‘soarable’ days than any other site in the UK. The club trains all levels from beginners to advanced pilots (Black Mountains Gliding Club 2008d).

Llangorse Lake and Common is located in the National Park it is the largest natural lake in South Wales and is known as a haven for wildlife, particularly birds. The Lake is popular for fishing, sailing, and windsurfing. At the lake site there is also an iron-age inspired Visitor Centre which attracts 75,000 visitors per annum (Brecon Beacons Park Society nd).

LLANWRTYD WELLS

The Cambrian Woollen Mill and visitor centre is based on the outskirts of Lianwrtyd Wells since 1917 disabled people have been employed at the Mill; many of the employees were the victims of foreign conflict. The Mill features an exposition which takes visitors through 700 years of weaving history named The Wonderful World of Welsh Wool. The tour concludes with a model of a veteran of the Great War surrounded by examples of the long association the mill has had with the armed forces and the Royal British Legion (The Royal British Legion 2008).
BRECON

During 1797 work began on the Monmouthshire and Brecon canal to link Brecon with Newport (see Figure 7.24) 37 miles of canal have been restored to award-winning standards. The canal travels along the mountainside above the River Usk from the Theatre Basin in Brecon to Cwmbran. Over recent years the area has been redeveloped and provides moorings with a backdrop of the Theatr Brycheiniog.

Figure 7.24: Route of the Brecon and Abergavenny Canal (Victorian Powys for Schools, nd e)

BRECON CATHEDRAL

The Cathedral is the Mother Church of the Diocese of Swansea and Brecon is regarded as one of its finest buildings of its kind in Wales. The buildings in the Cathedral close are the remains of the former monastic buildings and today provide the administrative centre for the Diocese as well as housing for the Cathedral clergy. There is a heritage exhibition and restaurant in the grounds.

THEATR BRYCHEINIOG - BRECON

Theatr Brycheiniog opened in 1997 and has established itself as a leading middle-scale venue and has attracted leading artists and companies, including: The Royal National Theatre, BBC National Orchestra of Wales and the Northern Stage Ensemble.
SOUTH WALES BORDERERS MUSEUM
The South Wales Borderers Museum in Brecon town centre stands adjacent to the barracks of the Royal Regiment of Wales, the museum houses extensive archive material, particularly relating to the 1879 Zulu war. The medal room provides a large display of regimental weapons and traces the evolution of soldier's weapons from the 18th century to the present day.

BUILTH WELLS WYE-SIDE ARTS CENTRE
Wye-side Arts Centre in Builth Wells is built in early Italian style and has been extensively modernised over recent years. Originally the building was the Assembly Rooms and Market House and also functioned as the town Court House. Today it houses a theatre, cinema and gallery, and also offers a full range of conference and exhibition facilities.

BUILTH WELLS GOLF CLUB
Builth Wells Golf Club was originally a Welsh Long House, built between 1520-1550 where animals lived at one end and the family at the other. The club claims to be 'probably' the oldest building being used as a golf club-house in England and Wales (Heart of Wales Golf Breaks nd).

LLANDRINDOD WELLS SPA WALK: LAKESIDE
In the centre of Llandrindod Wells is an artificial lake with a lakeside restaurant. The site is the starting off point for conducted one-hour walks – the Llandrindod Wells Spa Walks (Woodland Walk, Shaky Bridge Walk, Newbridge-on-Wye Walk and Hawk Walk (accompanied by hawks) (see Figure 7.25).
ALBERT HALL THEATRE

The Albert Hall Theatre is the base for the Llandrindod Wells Theatre Company which also houses an annual drama festival during the first week of May.

PORTICUS ART GALLERY

Porticus Art Gallery also in Llandrindod Wells has four rooms refurbished and decorated in the traditional style of the Arts and Crafts Movement (1880-1910) with a purpose-built area for exhibitions which are held throughout the year.

LLANDRINDOD WELLS BOWLING CLUB AND RADNORSHIRE INDOOR BOWLING CENTRE

The Radnorshire Indoor Bowling Centre is a modern six-rink indoor green, purpose-built to international standard facility. The Llandrindod Wells bowling club built is an out-door bowling green in 1912 is of an international standard.

NATIONAL CYCLE COLLECTION

The National Cycle Exhibition is a permanent display in Llandrindod Wells. The exhibition attracts enthusiasts to the town where there are over 200 cycles, memorabilia and videos of cycling through the ages. The collection is housed in the original 1890s showroom based on London's Michelin Building; the buildings architecture can be seen as yet another demonstration of the wealth created through
the spa industry in the town (see Figure 7.26a). In 1986 it was sensitively refurbished as seen in Figure 7.26b.

![Figure 7.26a: Automobile Palace (mid-1900s) (PCC nd b)](image)

![Figure 7.26b: Automobile Palace (2008) (National Cycle Collection 2008)](image)

**ACCOMMODATION**

The following survey was carried out for the PCC Economic Development Department (2006). Table 7.1 shows the number of accommodation establishments in named town locations in Powys – of these the overwhelming majority are verified.

<table>
<thead>
<tr>
<th>TOWN</th>
<th>VERIFIED</th>
<th>NON VERIFIED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abercraf and Crai</td>
<td>03</td>
<td>0</td>
</tr>
<tr>
<td>Brecon</td>
<td>90</td>
<td>19</td>
</tr>
<tr>
<td>Llangammarch Wells</td>
<td>03</td>
<td></td>
</tr>
<tr>
<td>Llanwrtyd Wells</td>
<td>12</td>
<td>02</td>
</tr>
<tr>
<td>Builth Wells</td>
<td>28</td>
<td>08</td>
</tr>
<tr>
<td>Llandrindod Wells</td>
<td>33</td>
<td>05</td>
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<td>Rhayader and</td>
<td>18</td>
<td>02</td>
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<tr>
<td>The Elan Valley</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 7.1: Powys Accommodation Survey (PCC 2006)

**ABERCRAF AND CRAI**

One of the verified accommodation providers in Abercraf is the Maes-y-Gwernen Hotel. The hotel won National Quality Awards from the AA, the RAC and Les Routiers in 1994, 1995 and 1997, respectively. A Health Chalet is situated in the grounds of the hotel which is an all-year round facility for tourists and guests, with: spa-bath, sauna, and solarium and gym equipment. The hotel has also introduced a ‘Wholistic’ [sic]
Centre in the hotel and provides courses for therapy, which includes yoga, and meditation. The hotel aims to use locally-produced organic fruit and vegetables.

BRECON

The town of Brecon has a wide variety of accommodation, hotels guest houses, caravan and camping sites. There are 90 WTB-verified accommodation providers in Brecon and 19 non-verified accommodation establishments, an example of which is Peterstone Court Hotel which is a luxury spa hotel with a fully-equipped gymnasium, and outdoor pool (see Figure 7.27).

Figure 7.27: Peterstone Court (Peterstone Court Country House and Spa nd)

There are three WTB-verified accommodation providers in Llangammarch Wells the largest of which are described and shown.
LLANGAMMARCH WELLS

The Cammarch Hotel in Llangammarch Wells was purpose built as a spa hotel (see Figure 7.28a). Figure 7.28b shows the spa treatments available in the hotel, taken from a tourist guide circa 1890.

Figure 7.28a: Cammarch Hotel: Llangammarch Wells from a tourist guide 1890 (Victorian Powys for Schools, nd a)

Figure 7.28b: The Spa Treatments available in the Cammarch Hotel 1890 (Victorian Powys for Schools, nd a)

During this time curistes were able to take the cold mineral baths containing: sulphur, calcium and magnesium in the hotel, the remainder could take (i.e. drink) the waters at the various sources in the town. There is no evidence today of the towns historic springs and wells or their medicinal quality, including one of the springs which was shown to be charged with chloride and barium. The Llangammarch site (well) is discussed in section 7.1.5 where the recommendations of the British Geological survey of Mineral Waters in Central Wales (1995:10) showed the well should be properly protected so as to preserve the mineral waters and that there is still scope for a small bathing establishment linked to Cammarch Hotel if sufficient volume exists.

Today, (2008) the hotel is a centre for walking and mountain biking and has access to 9km of fishing along the rivers: Cammarch and Irfon, which yield: brown-trout, chub, grayling and Atlantic salmon, In 2005 the hotel was awarded an AA 4 Diamond Rating and was named Venue of the Year in Wales 2005 by London &
Thames *Today Magazine* (Stay in Wales .co.uk 2008). Figures 7.29a and 29b show the improvements that have been made to the hotel in recent times.

![Figure 7.29a: Cammarch Hotel (1955) (Francis Frith 2008)](image1)

![Figure 7.29b: Cammarch Hotel (2005) (Stay in Wales .co.uk 2008)](image2)

The Lake Country House also in Llangammarch Wells is a fully modernised spa hotel (see Figure 7.30) which is set in 50 acres of parkland and a large trout and salmon lake which has no closed season. Guests can access many activities at the hotel which include; tennis, croquet, clay-pigeon shooting and a nine-hole golf course. The hotel has a helicopter landing pad, gym, sauna, indoor swimming pool, health and beauty therapy suite and three meeting rooms.

![Figure 7.30: The Lake Country House & Spa, Llangammarch Wells (Best Loved Hotels, nd)](image3)

**LLANWRTYD WELLS**

There are 12 WTB verified accommodation providers in Llanwrtyd Wells, and 2 non-verified accommodation establishments', the largest of which are the Neuadd Arms Hotel and the Lasswade Country House Hotel. The Neuadd Arms Hotel was built in C19 and is situated in the centre of the town, the hotel has 23 rooms on 3 floors, the hotel welcomes tourists who enjoy outdoor pursuits, and the hotel foyer bears a notice: 'we do not mind the dirty boots or the wet clothing in the front hall' (see Figure 7.31).
The Lasswade Country House Hotel is an Edwardian hotel built in 1904 with restaurant and conference facilities (see Figure 7.32).

Figure 7.31: Neuadd Arms Hotel Llanwrtyd Wells (Information Britain 2008b)  Figure 7.32: Lasswade Country House Hotel (iKnowWales nd)

BUILTH WELLS

There are 28 WTB-verified accommodation providers in Builth Wells and 8 non-verified accommodation establishments the largest of these are the Caer Beris Manor Hotel and Llangoed Hall. Caer Beris Manor Hotel, the former home of Lord Swansea (see Figure 7.33) is set in 27 acres of parkland and surrounded by the River Irfon. The facilities of the hotel include: golf, tennis, river-bathing, canoeing, and paragliding.

Figure 7.33: Caer Beris Manor Hotel Builth Wells (Caer Beris Manor nd)

Llangoed Hall is a five star hotel holding various awards for its food. It is five miles south of Builth Wells and located on the site of the former Welsh Parliament. The hotel looks out at uninterrupted views of the Black Mountains (see Figure 7.34). The hotel
provides transport for its guests including a 45-minute helicopter journey from London or use of the establishment's private jet.

LLANDRINDOD WELLS

Llandrindod Wells has 33 WTB-verified accommodation providers and five non-verified accommodation establishments. The following gives examples of the three hotels situated in the centre of the town: the Commodore Hotel, Glen Usk, and Hotel Metropole., (Powys Accommodation Survey 2004). The Hotel Commodore facilities include: 51 en-suite bedrooms, four function and conference rooms, a modern 180-seated ballroom, a themed restaurant, a carvery and bars (See Figure 7.35). The Glen Usk hotel's facilities include 79 en suite bedrooms. Three spacious bar lounges, two restaurants, a large function room with dance floor and a patio which overlooks the central gardens in the town (See Figure 7.36).
The Hotel Metropole is located in the centre of Llandrindod Wells (see Figure 7.37a), the hotel's facilities include 120 en-suite bedrooms, 16 function rooms, ballroom, restaurant and and indoor spa and leisure complex. The leisure and spa complex facilities include: solarium, steam room, sun terrace, beauty suite, massage rooms, hairdressing salon, spa whirlpool, exercise facilities and indoor pool see Figure 7.37b showing the beauty and leisure facilities building at the rear of the building.

During a meeting between the author and the owner of the Hotel Metropole, Justin Baird-Murray, said:

*We have an ongoing market in the conference trade and have made substantial extensions and alterations to the hotel, not only to provide adequate meeting rooms but also the quality that the conference delegates expects. It is because of this level of expectation that we are re-vitalizing and investing in our leisure facilities – the modern conference delegate wants a complete package-it is not just work it is a mini-break and the opportunity to network and we are seeking to provide an ambience to facilitate all that*

This statement from Justin Baird-Murray is in accord with the Wikipedia free encyclopaedia web-site article on Llandrindod Wells which states:

*Following Devolution in Wales, Llandrindod has developed a reputation for being the place where important decisions are made by political parties. Because of its position in Mid Wales close to the A470, Llandrindod is favoured by political parties for meetings that require representatives to turn out from across Wales.*

Wikipedia (2008)
7.3.3.  **HUMAN RESOURCES**

The largest employment catchment area of the towns in the Powys Spa and Wellness Trail is Ystradgynlais which contains a resident population of more than half a million people, thereby ensuring a potential ready supply of key commercial and industrial skills for high-quality businesses. The profile of the local workforce is shown below in Table 7.3.

<table>
<thead>
<tr>
<th>AGE</th>
<th>MALE</th>
<th>FEMALE</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-15</td>
<td>101,927</td>
<td>96,275</td>
<td>198,202</td>
</tr>
<tr>
<td>6-64</td>
<td>297,969</td>
<td>275,428</td>
<td>573,397</td>
</tr>
<tr>
<td>65+</td>
<td>67,871</td>
<td>128,996</td>
<td>196,867</td>
</tr>
</tbody>
</table>

*Table 7.3: Profile of the Local Workforce (Welsh Assembly Government 2004a)*

As identified in Chapter 5 the spa industry is extremely labour-intensive employing a number of cure-related jobs and those with no cure content. Many of these jobs are highly skilled. If the proposal for the Powys Spa and Wellness Trail were to be implemented there would be a massive demand for a range of staff including skilled therapists. In looking for potential employees in the existing labour market probably the most likely source would be the many hairdressing and beauty and holistic therapy practitioners based in the area. In Powys there are some 62 hairdressing micro-SMEs with over half of these performing beauty therapy treatments such as Indian Head Massage (IHM) and nail-treatments, e.g. nail extensions, manicures and pedicures. Each of the micro-SMEs has an estimated five part-time employees per business giving an approximate workforce of 310 persons employed in the hairdressing sector in Powys. From the 62 hairdressing micro-SMEs in Powys 38 are located in the Powys Spa and Wellness Trail (see Table 7.4).
These practitioners may need additional training in relation to the provision of remise-en-forme treatments. Other staff could be attracted into the area or indigenous people could be trained with requisite skills. Training in Powys for this sector is discussed in the next section.

7.3.4 TRAINING

Coleg Powys is a College of Further Education (see Chapter 1) serving the whole of Powys, the structure and organisation of the College responds, at least in part, to the demographic details of the population. The college itself has centred provision on three main sites in Brecon, Llandrindod Wells and Newtown with satellite centres in Ystradgynlais (south Powys) and Welshpool (north Powys). The college is one of the ten largest employers of full and part-time staff in Powys (the largest being PCC) and provides education and training for a population of 126,000 people distributed over 2,000 square miles.

In Ystradgynlais, the college administers the delivery of courses in anatomy and physiology, reflexology, aromatherapy, beauty, health and holistic therapy in the college there has been an increased interest in these courses which has promoted the college
to respond to this demand within the community by providing additional training at the Healthy Living Centre in Ystradgynlais.

In Brecon Coleg Powys offers a wide range of health/spa tourism vocational courses for adult learners which include: sport and leisure, agriculture, catering and tourism (see Figure 7.82 and 7.83) (details of these part-time courses are shown in Appendix 7.2). Coleg Powys Brecon also offers a two-year course Higher National Certificate (HNC) in Outdoor Education (full-time and part-time route) exploiting the benefits of the Brecon Beacons National Park and covering the knowledge and skills needed in the outdoor industry. The course is delivered in partnership with the University of Glamorgan. There are plans to expand the training provision to include: beauty therapy, sports therapy holistic therapy and hairdressing.

There is no training as such in Llangammarch Wells, Llanwrtyd Wells or Builth Wells however the residents have access to Coleg Powys Llandrindod Wells and Coleg Powys Brecon. College students from these towns have access to transport to these college sites and for certain categories transport is provided free of charge.

In Llandrindod Wells Coleg Powys is located in a former spa hotel known as Ye Wells Spa Hotel (see Figure 7.38). The building is largely unchanged from the time when mainly wealthy visitors arrived bringing with them their own entourage of servants who further swelled the numbers in the town.

Figure 7.38: Coleg Powys: formerly Ye Wells Hotel, Llandrindod Wells (Anon, 2005)
Today the college site houses the School of Hair and Beauty (see Chapter 1) it is a recognised centre of excellence for the vocational training of beauty therapy, sports therapy, holistic therapy and hairdressing (see Appendix 7.3). The college has good relations with spa hotels in Powys and offers advice, training for its staff, and student support when required. The college is also part of the town’s tourism super-structure since its extensive beauty facilities and modern gym are open on a commercial basis to the community and visitors. The thriving commercial business has 2,000 gym clients and an annual turnover of £25,000 in the college’s commercial salons. Figure 7.86 shows beauty and hairdressing students working on clients in the college commercial salons.

Given the low turn-over in staff in the Powys Beauty Therapy sector and the current limited growth of these indigenous businesses together with the number of students achieving beauty therapy qualifications in Coleg Powys (on average 60 plus students leave with beauty and holistic therapy qualifications each year), it means that the College is not training people solely for the local job market. Student destination and employer feed-back shows that the college has a positive reputation with national and international employers and all students, once qualified, have found well paid jobs within the industry. Many of the cohorts (in particular those pursuing careers in holistic therapy) are mature entrants and have become sole trading self-employed mobile businesses.
7.3.5 LINKS TO OTHER SECTORS

GLENDALE WORKSHOPS

The Glendale workshops site in Ystradgynlais was developed and is run by PCC and has been expanded, over a period of time, in four phases, this has produced a total letting stock of 50 units. The workshop units were set up to provide start-up facilities for the business community which was not able to take on the WAG built larger units, which have workspace of 2500 sq ft upwards. The County Council instead concentrated on providing space below and charged per square foot, with rent inclusive of rates, water-rates, building repairs and maintenance, decoration of communal areas, cleaning of communal areas, refuse collection, communal security and signage. PCC considers this a success story for the County Council and its predecessor authority (Brecknock Borough Council) (PCC 2002).

WOODLANDS ENTERPRISE PARK: YSTRADGYNLAIS

Woodlands Enterprise Park (see Figure 7.39) is a speculatively-developed enterprise site for SMEs. It has mixed-use quality accommodation units up to 20,000 sq. ft. The latest project (2008) incorporates two advance 5,000 sq. ft. units, there is also building land for bespoke units of similar sizes.

Figure 7.39: Woodlands Enterprise Park: Ystradgynlais (Welsh Assembly Government 2005a)

There are high quality telecommunication links to the site which could attract new call-centre operations. Swansea University provide a skills development network and
strong technical support for firms moving in who require the back up of international standard professional business services.

DANONE (CRAI)

There are seven companies bottling water in Powys which are on the official United Kingdom (UK) Natural Mineral Waters List, the list is recognised by the UK and published by the Food Standards Agency (Zenith International, 2007). The companies bottling water on the UK Natural Mineral Waters list in Powys are:

- Celtic Spring Churchstoke: (Montgomery)
- Cerist Dinas Mawddy (Machynlleth)
- Crystal Falls Glyntawe (Penycae)
- Montgomery Spring (Churchstoke)
- Radnor Hills Heartsease (Knighton)
- Springbourne Churchstoke (Montgomery)

The company Danone owns a bottling factory in Ystradgynlais where the water is drawn from source; Danone is a leading global-food, bottled water and beverages company. The company also bottles water for Evian, Volvic, Aqua, Bonafont, and Font Vella (see Figures 7.89 and 7.90). The companies branded water products include Volvic and Evian. The Danone factory is based at the foot of the hill leading to the Crai Reservoirs and Dams which supply water to Swansea.

BRECON WATER JET

Brecon Water Jet is a company that manufactures state-of-the-art integrated water-jet technology to cut materials including; Mild Steel, Stainless Steel Plastic, Tile, Marble, Granite and Titanium.
BRECON PHARMACEUTICALS LTD
Brecon Pharmaceuticals Ltd. is a subsidiary of AmerisourceBergen Corporation and a leading outsource services provider to the global pharmaceutical industry. The business is centred around the specific areas of packaging, clinical trials and manufacturing pharmaceutical products.

3W-THREE WELLS WATER COMPANY: LLANDRINDOD WELLS
The 3w-Three Wells Water Company: Llandrindod Wells is based in Three Wells Farm and is situated on the site of an old blacksmiths workshop. During the late 1800’s the farmhouse was a private school before being vacated for use as a cattle shed in 1901, the building has been preserved, and retains most of its original features. The farm is still a family house and in the last few years the opportunity has arisen for the water to be captured at source and distributed in a uniquely-developed pouch (See Figure 7.40).

Figure 7.40: 3w-Three Wells Water Company Advert (Three Wells Water Company 2006)

7.3.6 FESTIVALS AND EVENTS
Powys hosts a large number (395) of smaller local events, such as the Mid Wales Beer Festival in Llanwrtyd Wells, Ystradgynlais unlike Llangammarch Wells stages local events, e.g. occasional concerts by Cor Meibion Ystradgynlais (Ystradgynlais Male Voice Choir), various sporting events in Ystradgynlais Rugby Football Club and exhibitions, cinema-shows and plays in the Ystradgynlais Miners Welfare and Community Hall. The area attracts several major sporting events, but there is no obvious tourism literature available to advertise them. Events such as the Wales GB
Rally feature one (forest) staged in Powys and the two-day Mountain Bike 'Enduro' are also staged in the region. Probably the largest and most prestigious hallmark event held in the Powys spa towns is the annual Brecon Jazz Festival when the top names from the jazz world descend on the town for three days each August for simultaneous concerts and events. The Times Review (2001) described the Brecon Jazz Festival as: 'The most enjoyable of all Britain's festivals,' (British Broadcasting Corporation Wales/Mid nd).

The annual week-long Hay Festival of Literature in May or June takes place close to the spa towns in Hay-on-Wye attracting leading celebrities, writers and poets, Nobel prize-winners, Hollywood stars, Booker novelists and international politicians.

Builth Wells is the home of the Royal Welsh Showground (see Figure 7.41) The Royal Welsh Agricultural Show (RWAS): is a four-day event held annually in July it is the biggest of all of the major agricultural events in Britain and attracts more than 200,000 visitors, up to 7,000 entries of livestock and over 1,000 trade stands together with sections which cover the whole of farming and rural life in Wales. The Showground also hosts two other annual events: the Smallholder and Garden Festival (comprising shopping, food, flowers, crafts, rare breed animals, competitions, children's entertainment and displays) and the Winter Fair (livestock competitions, trade stands and various attractions).

Figure 7.41: Royal Welsh Showground (The Royal Welsh Agricultural Society nd a)
Llandrindod Wells annually stages a much smaller hallmark event – the Victorian Festival - for one week in August when the streets close to normal activities and locals and tourists wear Victorian dress and ride in horse-drawn carriages as well as participating in over 300 events, including: street-theatre; walks; talks; exhibitions (see Figure 7.42). The Pavilion Conference Centre situated in the centre of the town is an increasingly popular venue for events and can hold up to 500 delegates, with a smaller meeting room which can accommodate up to 60 delegates. The town is also the regular venue for the start/finish of over 25 annual National and international car and cycle rallies (see Figure 7.43).

In contrast Llanwrtyd Wells has a year-long calendar of local events and activities; Green Events Ltd was set up in 1979 to enhance the local economy. The prime objective of the company was to organise a new event each year, it is a non-profit making business which markets unique events within the town and surrounding area. In 2005 Green Events was the winner of the Welsh Tourist Board (WTB) ‘Top Day(s) out in Wales’ award (see Figure 7.44).
The town hosts many events to showcase its unique resources; e.g. a Gourmet Festival of Fine Food and Wine; the two most famous are: the Man versus Horse Competition (see Figure 7.45a) and the World Mountain Bike Bog Snorkelling Championship (see Figure 7.45b). The Man versus Horse competition is an annual International sporting event held on August Bank Holiday Monday. It is a marathon race which attracts runners and riders from across Europe. In 2005 - famously - man beat horse precipitating enormous media attention for the town. In the Bog Snorkelling Championships competitors have to cycle or swim two lengths of a channel cut in a bog using snorkels and specially-adapted mountain bikes.

Figure 7.45a: Man v Horse Marathon Llanwrtyd Wells (2005) (Green Events Tourism Partnership Mid Wales nd).

Figure 7.45b: World Mountain Bike Bog Snorkelling Championships Llanwrtyd Wells (Green Events Tourism Partnership Mid Wales nd).
The Bog Snorkelling web site (see Figure 7.46) is dedicated to the one event and shows the results of previous years to the competition and has applications for the 2008 the site is not linked to any other events which occur in the town. The Green Events web-site and the Bog Snorkelling web site both achieve what they set out to do which is to advertise the special and unusual events in the town.

Figure 7.46: Bog Snorkelling - Llanwrtyd Wells (Bog Snorkelling, nd)

7.3.7 COHERENT MARKETING AND PROMOTION

The marketing of Powys is very fragmented with little coherence, in Ystradgynlais there is one tourist brochure which for example simply majors on its industrial past by showing ink drawings of the Ynyscedwyn Ironworks Park; this is a missed opportunity the town has within its region award-winning caves, major mineral water bottling plants (Danone) Craig-y-nos-Castle and the Adelina Patti Opera House. The Ystradgynlais English Home Page is the web page of Ystradgynlais and District It has been created by Ystradgynlais Town Council which serves Abercraf, Cwmtwrch, Ynyscedwin and
Ystradgynlais wards. The web-site gives a brief history of the town but is ostensibly aimed at investors in the town and not at the tourist market (See Figure 7.47).

The marketing and promotion of the Brecon Beacons National Park is made up of two brochures (2008) and four web-sites. First, the Brecon Beacons National Park - Online Guide Book (see Figure 7.48). The first page has the tag line: *Take Nothing but Photographs Kill Nothing but Time, Leave Nothing but Footprints* the second web page features the menu.
The Guardian newspaper is quoted on the web site thus: an extraordinarily comprehensive site which while not as flashy as some of its rivals proves a great deal more useful. It is not clear why this site was developed and what is its purpose; it clearly supports the interests of the National Park and states that:

*The website is non-profit making and there is no charge for listing and the website does not accept advertising or payment of any kind*

The following comment which has been added might suggest it was developed by people with the view that the 'official' site did not do the Brecon Beacons National Park justice. First, there is a quote from Chris Bonington (a mountaineer who is a Member of the Council for National Parks):

*Your web site is excellent...a real leader in the National Park Field*

Second, the site quotes Tim Berners-Lee (creator of the World Wide Web, who has a home in the Brecon Beacons) saying that Brecon Beacons National Park is

*a world class landscape.*

Whether Mr. Berners-Lee has supported the notion of a site to rival the official National Park site is not stated however there is a clear implication in a further statement that the official site was not felt by several parties to be of an appropriate standard, it reads as follows:

*The Brecon Beacons National Park Authority has renewed its website which now contains additional information all in a user friendly new design.*

(Brecon Beacons National Park Information at the Mountain Hut 2008)

Figure 7.49 shows the official Brecon Beacons National Park tourist information web site: the strap line is *Brecon Beacons National Park: One of Britain’s breathing spaces*
Figure 7.49: Brecon Beacons National Park (Brecon Beacons National Park nd)

The official site is well-constructed and easy to follow; the third site is the Brecon Beacons Tourism website (see Figure 7.50) which has been developed with support from Tourism Partnership Mid Wales (TPMW) This web-site offers links to various types of accommodation.

Figure 7.50: Brecon Beacons National Park Tourist Information (Brecon Beacons Tourism nd)
The fourth site (see Figure 7.51) shows the ‘Cycling in the Brecon Beacons National Park’ web-site which gives general information about the National Park and specific information regarding the locations of how to get to various information centres and cycle hire centres.

![Figure 7.51: Cycling in the Brecon Beacons (Cycling in the Brecon Beacons National Park nd)](image)

There is obviously duplication of information on the sites, they do not complement each other and do not give a coherent image of the town of Brecon, the Brecon Beacons National Park, the branded product (water) or the facilities and activities that take place in the region.

There is no coherent marketing and promotion of Llangammarch Wells. The main website for the town is very dated with scant and basic information (see Figure 7.52). There is an email address on the site which invites questions regarding further information of the town. On placing a request for information on 28.04.08 the following was received.

*Hi. This is the qmail-send program at yahoo.com. I'm afraid I wasn't able to deliver your message to the following addresses. This is a permanent error; I've given up. Sorry it didn't work out [lynn@curlew1.free-online.co.uk](mailto:lynn@curlew1.free-online.co.uk). Sorry; I couldn't find any host named curlew1.free-online.co.uk. ([#5.1.2](#))

Llangammarch Wells 2007*
The Llanwrtyd Wells Tourist Information has established an independent Tourist Centre in the town which offers accommodation services and information regarding local events. The centre is a voluntary organisation set up following WAG's decisions to cut back on local Tourist/Visitor Information Centre (TVIC) services. See Figure 7.53 Llanwrtyd Wells (official website): 'The Secret Heart of Wales'.

Figure 7.52: Llangammarch Wells Web-site (Llangammarch Wells 2007)

Figure 7.53: Llanwrtyd Wells Web site (Llanwrtyd Wells Mid Wales Powys UK nd)
The 'Llanwrtyd Wells Visitors Guide to the Area' web-site (See figure 7.54) is also produced by the Llanwrtyd Wells Tourist Information Centre and is mostly a duplication of the information found on 'The Secret Heart of Wales' web-site.

Figure 7.54: Llanwrtyd Wells - A Visitors Guide to the Area (Welcome to Llanwrtyd Wells 1999)

There is evidence of coherent marketing and promotion in Builth Wells of the Royal Welsh Show and of the established hotels in the Builth Wells district e.g. Llangoed Lake Hotel. The town's official web-site (Figure 7.55) looks very promising at the outset with a notice board and seemingly interesting links, however the links are mainly for the resident population with little tourist information. The web-site states:

*it could be argued that, with the disappearance of the railway and its absolute decline as a Spa, Builth's heyday has passed. This however, could not be further from the truth. The ancient function of a market town remains and Builth without doubt has a lot to offer the resident and visitor alike.*

This remains a debatable point.
There are four web-sites advertising Llandrindod Wells. The first: Croeso I Gymru website is shown in Figure 7.56, the site does not have an author or webmaster but the information is taken directly from the Llandrindod Wells in Powys website (see Figure 7.57). The information contained on that site is attributed to the booklet 'Llandrindod Wells Town Guide' which was produced by Llandrindod Wells and District Chamber of Trade no date is given but the style would indicate circa 1990. Figure 7.58 the Welcome to Llandrindod Wells website contains the same information as Figures 7.56 and 7.57. Following investigation (a telephone call to the Spa Town Trust) the site was found to be produced by the manager of the Spa Town Trust when the Llanddoby (a mythical figure that appears in various places throughout the town) was launched in 2001 the site has not been updated since then.
The fourth web-site (Figure 7.59) is dedicated to the town’s annual Victorian festival and is sponsored by PCC and the Llandrindod Wells Town Trust. The site gives very basic information regarding the festival and does not have links to other facilities or events in the town.

Figure: 7.59: Llandrindod Wells Victorian Festival Web-site (Powys and Llandrindod Wells Town Council, 2008)

7.3.8 BRANDING
One product has the branded image of Brecon and that is Brecon Carreg Natural Welsh Mineral Water. The water is sourced within the Brecon Beacons National Park and has won several awards including a True Taste Award (Bronze in 2005). The ‘True Taste’ logo is a distinguished mark of excellence. The award is organised by the Welsh Development Agency (WDA) - in 2005 there were over 500 entrants (see Figure 7.60). The Brecon Beacons National Park is synonymous with healthy outdoor activities but does not have any branded products as such.
There is no evidence of any branded products in Ystradgynlais. The town continues to have an image and reputation of a heavy industrial coal mining and steel producing town in the Upper Swansea Valley.

There is no branded image or branded products in Llangammarch Wells or Llanwrtyd Wells.

Builth Wells was an established market town before spa tourism in the town. The town hosts the Royal Welsh Agricultural Show which is an established major British event but the show is not synonymous with the town but rather with Llanelwedd which are the grounds on which the show takes place. The town has in recent years developed as a conference centre, due in the main to its geographic location, marketing information describes Builth Wells as a spa town without actually being a bone fide working spa. As a consequence the town does not have any branded image.
7.4 DISCUSSION

This discussion is based on the findings of the audit of Powys which focused on the seven towns / locations in Mid Wales associated with the *Powys Spa and Wellness Trail*, namely Ystradgynlais, Brecon Beacons National Park, Llangammarch Wells, Llanwrtyd Wells, Builth Wells, Llandrindod Wells and the Elan Valley Dams and Reservoirs. The concept for a Powys Spa and Wellness Trail in Powys is derived from the findings of Chapter Five which looked at specific spa regions of France which were Vichy, La Bourboule, Châtel-Guyon and Saint Malo. The case study and audit followed the framework for a competitive health/spa tourism destination developed in Chapter Three (see Figure 3.1).

The premise of this analysis is that the spa towns of Auvergne and Saint Malo have features and characteristics that constitute exemplar models of health/spa tourism and that those features are themselves transferable, given adjustment to accommodate alternative local circumstances – in this case Powys. The analysis starts by looking at selected characteristics and strengths identified in the France model and then considering how far these are applicable to Powys based on the idea of using the promotion of a Powys Spa and Wellness Trail as a vehicle for economic regeneration. This then reveals the shortfalls in the region to successfully exploit health/spa tourism and the necessary action to create a branded image of Powys as a Welsh health/spa tourism destination.

The Powys audit revealed that it shares geographic, social and historic attributes and conditions with the Auvergne and Saint-Malo. The Powys economy is largely based on agriculture and tourism, with a high incidence of self-employment and small businesses predominating, together with employment opportunities from the public sector.
(particularly local and central government and the army). The audit showed that the promotion of health/spa tourism in Powys is in line with the major economic development policies and tourism strategies produced by WAG for Wales in C21 (see Section 7.1.2) and the Mid Wales Regional Tourism Strategy- Naturally Different (1999-2008).

SOCIO-ECONOMIC PROBLEMS OF POWYS

There are inherent economic weaknesses in the Powys economy with its heavy dependence on agriculture and poorly-developed manufacturing sector. Three quarters of the population of Powys live in the countryside or in settlements of less than 2000 people. Two of the trail towns fit into this category - Llangammarch (pop: 475) and Llanwrtyd Wells (pop: 601). The trail incorporates larger Powys settlements: Ystradgynlais (pop: 8,200), Brecon (pop: 7,500), Llandrindod Wells (pop: 5,024) and Builth Wells (pop: 2,352), but regardless of location there are shared social factors. For example, whilst unemployment is generally low (with the highest tending to be in Llandrindod Wells and Ystradgynlais), the average wage and household incomes of people residing in the Powys Spa and Wellness Trail are among the lowest in England and Wales. At the time of writing, inflation figures from the Bank of England have exceeded government targets as a result of significant price increases in living costs of housing, transport, food and heating. Local wages are not rising at an equivalent rate which places a squeeze on disposable income. It is a reasonable assumption; therefore, that discretionary spending is strictly limited and may not necessarily be directed towards healthy living. These are the pre-conditions for housing deprivation, fuel poverty and food poverty, exemplifying the thoughts and findings of Diener et al (2002:12) who claimed unemployment has ‘deleterious effects on well-being’.
Recognition of the clear link between unemployment, low wages and poor health led to the Ystradgynlais Community Hospital being set up specifically to provide regular clinics to treat chronic disorders of: chest conditions, cancer and injuries to the musculoskeletal system as well as offer psychiatric treatment. When the opportunity for developing social facilities arose for Ystradgynlais through the Communities First programme, this preoccupation with well-being emerged as an important sub-objective, which was to: *Promote health and well-being through an active and healthy lifestyle and by addressing a range of issues that affect people's health* (p 54). A properly structured development of health/spa tourism would not only promote regional economic regeneration, it could also act as the very necessary catalyst to actively support this sub-objective by raising the issues of healthy lifestyle to a wider indigenous audience.

If access to jobs and good wages is a given to secure a healthy lifestyle, then for most living in Mid Wales the real issue for healthy living is transport poverty. Public transport provision in rural Powys appears to be a difficult issue: high capital costs for set-up and refurbishment together with high revenue costs with relatively low-usage rates, means that its provision is, at best, a marginal enterprise. Deregulation of transport in the 1980s from being an entirely public enterprise to being entirely private or private / public partnerships has often reduced both capacity and frequency of services. As a result, to gain access to jobs and homes most people have to run at least one car, so a disproportionate part of net family income characterised by low wages, is dedicated to transport. In addition, with low capital assets any car may well be older and of a poorer quality with the concomitant impact of higher servicing costs and reliability issues. Consequently any increase in fuel costs or other running costs, either by taxation or by production costs, has a real affect on the local economic prospects with a dependence on agriculture and tourism. Moreover, if rural families have only one vehicle, and that is
taken on a daily basis by the main breadwinner, then there is a real social issue of isolation and its impact on healthy living for those left behind. It is ironic that the issues of inaccessibility and rurality could be considered a major plus factor when promoting the region for health/spa tourism as seen in the Auvergne.

WATER, AIR AND COUNTRYSIDE IN MID WALES

Mid Wales, is characterised by remoteness and its sparse population, which compares favourably with the Auvergne however, unlike the spa regions of rural France it is relatively unexploited by tourism. As a consequence the Mid Wales towns which have suffixes synonymous with water i.e. ‘Wells’ now have no real association with the mineral waters which were their raison d’être. Throughout the Powys Spa and Wellness Trail i.e. from Ystradgynlais through to the Elan Valley the predominant natural resource is water which provides tourist attractions including waterfalls, country caves, potholing and reservoirs for fishing boating or just enjoying.

Within the trail, Ystradgynlais stands alone in having an industrial rather than agricultural heritage however the importance of the town’s water resources – critical to its industrial origins - are once again significant to its economic future. Examples of this are found in the Danone bottling plant sourcing water from the region and the opening of the Dan-yr-Ogof caves

The natural resources of the towns in the Powys Spa and Wellness Trail area are the clean air and the green landscape of the surrounding countryside - most particularly in the Brecon Beacons National Park and the Elan Valley.
CONSERVATION OF THE ENVIRONMENT

Countryside tourism is already a major contributor to the economy of Mid Wales; health/spa tourism would provide the region with an opportunity to increase its share of the market, by promoting its unique spa history, healthy lifestyles and recuperation. Health/spa tourism would not affect the current strategy of conservation of the existing rural environment in fact it could be enhanced by promoting the whole region as a peaceful and tranquil area whose main appeal is its lack of development.

The architectural remains of the region’s historic health/spa tourism industry, the sparse population, few towns, its underdeveloped and unsophisticated tourist amenities and the rural way of life raise a long-term potential for a modern health/spa tourism concept, which can enable the conservation of the environment and preserve a rural Mid Wales.

To exploit these attributes effectively would require a coordinated marketing campaign, and this may well be best delivered by using the marketing model as developed by Therauvergne in the spa towns of the Auvergne.

TOURISM INFRASTRUCTURE OF THE POWYS SPA AND WELLNESS TRAIL

What emerges from the audit findings are that there is an opportunity to develop a unique identity which will appeal to a new generation, as well as new categories of tourists through health/spa remise-en-forme treatments and fitness and programmes to improve lifestyle patterns. The historic spa legacy in Powys has resulted in many first class hotels which provide a large amount of tourist accommodation in relation to tourist numbers. Health/spa tourism tourist’s direct expenditure on accommodation, food, petrol, events and attractions would stimulate indirect expenditure, resulting in reinvestment and a better offer to the tourists over time. In addition the more recent
development of broad band in Mid Wales means that the visitor can keep contact with their busy life during their vacation.

The information super-highway will be important to the development of the area since it offers equality with urban areas without the distorting effect of time and distance. Broadband will offer, at the very least, the opportunity to develop branding and marketing and in exploiting training as part of the economic development package. At best it offers an economic lifeline to the area in allowing the development of new businesses that are not location specific, and can therefore move to Mid Wales and bring with them jobs geared to urban markets further away rather than local low wages. Raising the bar to bring wages up to at least the UK average is the first target in seeking economic parity.

INCREASING VISITOR NUMBERS THROUGH A POWYS SPA AND WELLNESS TRAIL

There are important ways in which the Mid Wales accommodation providers could benefit from the France case study findings. First, the European experience of the spa sector in the ISPA report discussed in Chapter Three (p36) shows that it is very lucrative with the global spa market population estimated at 160 million and in Europe was valued as being worth £9 billion. It also showed British residents taking around 13.6 million spa trips per year with about half of these trips to foreign destinations, which means that only 17% of the total spend of £8 billion (i.e. £1.4 billion) stays in the UK. If Powys could attract only a fraction of the total spends through a new health spa tourism market, it would make a significant contribution to the Powys tourism economy. Second, the hotels in the Powys Spa and Wellness Trail can provide year-round accommodation and facilities - unlike some of the hotels in Auvergne where, for example, in La Bourboule the hotels are unable to extend their season as they do not have appropriate heating systems and apparently lack sufficient capital financial
resources to up-grade the premises (there could also be a market assessment here that the market is insufficiently large to warrant the investment, but currently, without the accommodation, it cannot be tested). This is not a problem for Vichy who offer remise-en-forme fitness packages and Saint Malo who have developed wellness and wellbeing ‘stays’ which are available throughout the year. For Powys, this is a significant opportunity to promote ‘Short, (week-end) breaks/stays’ year-round.

The ETC identified five key segments of consumers for health/spa tourism products: radicals, independents, seekers, conformists and sentimentals. Each segment has marginally different characteristics and as a consequence is attracted to slightly differing products. The audit shows that all of the segments of consumers can be attracted to a Powys Spa and Wellness Trail ‘Short (week-end) breaks/stays’ year-round promoting wellness and relaxation.

In terms of accommodation in Powys, the existing hotel infrastructure is undersubscribed. Vichy and Saint Malo use their extensive accommodation to facilitate the conference and convention trade by developing short, health stays which include out-door activities. They have also developed language tourism where the visitor can learn a foreign language and combine their studies with de-stressing remise-en-forme programmes. Using the accommodation to coordinate such multiple uses, is the result of good management of the resource itself, as well as effective branding and marketing to make other sectors aware of the combined opportunity available at a spa resort.

There is evidence as shown in the, the Pavillion in Llandrindod Wells and the Wyeside Centre in Builth Wells that Mid Wales is developing an expertise in the conference market this could be improved by extending the link between it and the wellness market
e.g the spa hotels such as the Hotel Metropole Llandrindod Wells, The Lake Hotel Llangamarch Wells and Coleg Powys beauty, holistic and sports facilities.

Part of the success of ‘Short (week-end) breaks/ stays’ either in Wales or France, is through personal recommendation and repeat visits and will be predicated on quality and reputation. The example of Châtel-Guyon: where children go because their parents/grandparents visited them. As a direct result the town has a loyal clientele despite its lack of modernisation. In terms of significant numbers this method of marketing takes time to evolve.

For France there is a distinct advantage accrued in terms of visitor numbers to spa resorts. The curistes stay will be covered (wholly or in part) by French Social Security. The UK government does not support curative stays. However, there may be a similar way forward for Mid Wales through a bespoke Powys Spa and Wellness Trail ‘Corporate Fitness Break’.

**POWYS SPA AND WELLNESS TRAIL: CORPORATE FITNESS BREAKS**

As discussed in Chapter Three (p36), the UK Health and Safety Executive estimate that five million workers in the UK believe that they are exposed to work stress (HSE 1995:2) and that health care costs can be reduced by evaluating the role of disease and illness-related behaviours such as: smoking, high cholesterol levels, lack of exercise, high blood pressure, alcohol consumption and stress (Chapter Three p25). Redress for this issue could be achieved, at least in part, by linking the growing conference market in Mid Wales with corporate fitness. This would encourage another major health/spa tourism market sector which could benefit from the existing hotel provision and the new and emerging spa hotels and the Leisure Centres in the Powys Spa and Wellness Trail.
It was suggested in Chapter Three that all accommodation businesses are able to exploit the health/spa tourism niche, regardless of size. Larger hotels can invest in spa facilities, providing a mix to appeal to targeted segments and different life stages. Although Bed and Breakfast and guest house operators are unlikely to be able to offer spa facilities themselves, they could package concessionary deals to facilities operated by other providers of appropriate quality. Potential health/spa tourism accommodation providers can exploit their location and natural local distinctiveness, be it mountain, lake, seaside or rural setting as well as offering healthy eating options and provide optional extras to add value, ’such as visiting massage or other treatments’ (ETC 2002:29).

REVIVING THE SPAS AND WELLS OF POWYS

The spa towns of the Auvergne and Mid Wales were purpose built as spa resorts. The French spa resorts have survived; the spas in Mid Wales have been closed for many years. It is ironic that these closures have come about at least in part as a result of the introduction of the NHS, whereas in France they remain open because of their support. There is little scope to revive the traditional spa industry in Mid Wales. The culture of traditional spa in France is unbroken and ongoing: the visitors are loyal to particular spas. The French spa industry benefits from medical endorsement of the curative powers of thermal spa waters this tradition extends to the belief in the medical effectiveness of spa treatments. These beliefs enable French curistes to spend main holiday times in the traditional spa towns.

The recommendations of the Mid Wales geological survey (1988) of the spa waters show: 
The Llanwrtyd Wells site (Dol-y-Coed) is considered the most attractive of the mineral water sources. It is contained and the flow is considered as reasonable. There is
scope for a bathing establishment linked to the existing site at Victoria Wells (in Llanwrtyd Wells). There is scope for the bottling Llanwrtyd Wells mineral water as it already has a good name (i.e. Wells), which, together with the historical associations and the quality of the water give it excellent potential as a table-water.

That the Llangammarch site (well) should be properly protected (to preserve the mineral waters) and could be a drinking well feature in the town. Also that there is scope for a small bathing establishment linked to the local Cammarch Hotel.

The Builth Wells waters are no longer accessible, but steps could be taken to re-discover the saline source (the highest in Central Wales) and to assess its use in modern terms.

The survey suggests that there are commercial possibilities for these waters if the area was to feature the regions historic spa past as a link for future commercial prosperity. Reviving the spa waters as recommended would encourage renewed interest in this heritage of Mid Wales and create opportunities for positive economic benefits to hoteliers and local businesses through additional bed nights and tourist expenditure in these smaller spa towns.

Unlike the smaller spa resorts Llandrindod Wells has made several concerted attempts to regenerate the once highly-successful Rock Park Spa. The audit may have thrown some light on why these attempts have been unsuccessful.

**ROCK PARK SPA CENTRE LLANRINDOD WELLS**

The Llandrindod Wells Town Trust is responsible for the day to day running of the Rock Park Centre in the town of Llandrindod Wells. The Trust has sought to identify
opportunities for capital investment to develop the centre, first in the private sector and subsequently through EU capital project schemes, but the projects have to date been unsuccessful. The interview with Jeremy Wright said the reasons for this failure were several, but principally because the offered level of capital intervention via the EU was too low to make any scheme viable for local authorities whose capital budgets were already significantly overloaded. This contrasts sharply with the Objective 1 areas of West Wales and Valleys where many capital schemes could be entertained simply because the intervention rate was so much higher. Nonetheless, the aspiration of the local authority was to re-energise the traditional water cure facility in a modern idiom to act as an economic driver for the future.

The pre-conditions for take-off for such a scenario included the need for local politicians to have a clear and joint vision of the idea, the mechanisms to realise it and the commitment to its long-term delivery. For a small local authority, with limited fiscal resources, no recognised political structure (for instance based on national recognised political parties) and no leadership either from the officer class (as in the Bath Millennium Spa project) or politicians, this was an aspiration too far. Their thinking – that there was potential for a health based tourism initiative was right, but there was no facility beyond that to bring any of it to fruition.

The concept of a trans-European marketing strategy allied to the development of a world-class facility may well have been in the mind of some sitting round the table at early day discussions, but such a scheme requires confidence, resources, tenacity and belief to bring it into being as shown in La Bourboule and Vichy. None of those attributes were available in a sufficiently clarified form for the scheme to have ever been anything but a muddle from the start. The Local Authority passed the operation of the Rock Spa to a Trust based on both the idea that it was right that a specific and
expert body rather than the LA should be the operator, and as a mechanism to gain an effective and enduring use for a council-owned Listed Building. In hindsight, the faults with this thinking were two-fold: first, there was no evidence that the Trust so formed had the expertise to carry the whole idea forward and to operate a spa to the level of success that would be a palpable addition to the economic life of the town and second, that this “off loading” would deal with the issue of sustaining and maintaining a Listed Building. In the matter of the latter, the Trust was even less qualified than the LA were for the spa operation and the LA found it having to try to deal with its responsibilities for the building with a less than co-operative partner.

In other words, the scheme was inspired by a fine idea, but marred in its execution by a real lack of understanding of the business, a poor organisational structure and inadequate resources. In addition, it took no note of the likely market the centre would serve: would customers for modern day treatments and therapies actually want to visit the Rock Park? There was no market analysis to lead to the conclusion that it would be viable: just a wish and a belief that if reopened the Rock Park would work as a spa.

In reality what was needed then, and would be needed now, is a new build which could be designed on the same lines of La Choissey in La Bourboule to provide modern remise-en-forme treatments to a new health/spa tourism market. Another exemplar would be Les Celestins in Vichy who have combined the branded Vichy product laboratories within the modern remise-en-forme spa. In any event, a new spa project for Llandrindod Wells should, in the light of past failures, be designed to world-class standards and run competently, based on adequate market research with a budget to maximise market share. It could be viewed that the reality is that PCC is constrained in resources with real problems in delivering its statutory duties let alone discretionary opportunities and would look to others to pick up the baton of the idea of a rejuvenated
spa, but might act as file-carrier at any meeting. For Powys, the initiative would have to be picked up at all Wales level (i.e. WAG) facilitating trans-European partnerships and maximising the opportunities afforded by convergence monies, but ultimately building a model that was sufficiently attractive to survive on its own terms in the private sector.

THE WATERS OF LLANDRINDOD WELLS
Llandrindod Wells does not have an infinite supply of mineral waters and there are bacteriological and chemical problems with the mineral waters which currently breach EU regulations. These problems can be overcome with UV treatment, but that may create a new problem in that if the content of the water is changed to meet these regulations as the healing properties might not be the same. It would, however, still provide mineral water for drinking from a spa source which would add a USP to the towns in the Powys Spa and Wellness Trail.

The lack of mineral water would not prevent thalassotherapy treatments and remise-en-forme being the primary purpose of any new centre, since adding common salt to waters to perform saline treatments was done in Llandrindod in Victorian times and is commonly used in spa therapy today. An example of this procedure can be found in the new St. David’s Spa in Cardiff.

HEALTH SPA TOURISM TRAINING IN MID WALES
The development of a new health/spa tourism market should rest firmly on training. Currently, students trained in Coleg Powys in health, fitness holistic therapy and hairdressing largely find jobs outside the region, giving other areas the benefit of these skilled and qualified people. The establishment of a major initiative in health/spa tourism in the region would create the job opportunities for locally trained people to
remain in their communities. This situation would be a direct indicator of health/spa tourism being an economic driver in providing capital investment and jobs.

Coleg Powys is a centre of excellence for health/spa tourism training in Ystradgynlais and Llandrindod Wells. If health/spa tourism was adopted as a vehicle for economic regeneration the college would be well placed to create a Powys Health Spa Training Academy on the lines of INFATH. The primary aim would be to provide training and employment opportunities with a special emphasis for the indigenous population.

In addition Powys Health Spa Training Academy could offer English language courses with remise-en-forme treatments available to foreign students would also be spa clients as in Vichy. In this way the education, training and employment opportunities created by health/spa tourism would raise the profile of Powys as a premiere location for health/spa tourism training and raise awareness amongst tourists of the facilities on offer in the area.

In this way a Powys Health Spa Training Academy would facilitate the growth of an indigenous health/spa tourism service sector, catering for people travelling to Mid Wales to access complementary and wellness programmes, as well as therapies developed and available locally which could be endorsed by a brand name. This latter could also sponsor and endorse the courses and the health/spa tourism qualification on offer. These measures would provide a clear advantage in providing graduates of health/spa tourism new local employment opportunities.

Health/spa tourism would not affect the current strategy of conservation of the existing rural environment in fact it would be enhanced by promoting the whole region as a peaceful and tranquil area whose main appeal is its lack of development. The architectural remains of the regions historic health/spa tourism industry, the sparse
population, few towns, its underdeveloped and unsophisticated tourist amenities and the rural way of life of Powys raise a long-term potential for a modern health/spa tourism concept, which can enable the conservation of the environment and preserve a rural Powys. These attributes will, however, as in the Auvergne France require coordinated and effective marketing of Powys as a healthy and environmentally friendly tourist destination.

HEALTH SPA TOURISM IN MID WALES

The development of health/spa tourism offers a point of change for the Mid Wales economy away from the primary dependence on agriculture and should complement the existing tourism infra-structure in both the maximum use of existing accommodation and the association of the area to its history of spa waters and health. The strengths of a Health/Spa tourism strategy are: - Coleg Powys and the Rock Park Spa Llandrindod Wells, reviving the traditional spas and wells of Powys as visitor attractions, conservation of the environment and the development of health/spa tourism products. The concept of a Powys Spa and Wellness Trail is also intended to benefit the wider community directly in opportunities for industrial expansion by associated product development, agricultural diversification, direct employment and the use of local resources and to create new opportunities for developing new markets associated with health/spa tourism. This would give a real potential of qualified higher skilled jobs for local people through therapy, new related industry, increased visitor stay and yet still retain and support the amenity and character that is Powys.

7.5 CONCLUSIONS

The case study of Powys evidences the appropriateness of adopting a health/spa tourism focus for regeneration in Powys. The economy of Powys offers few
development opportunities and unemployment is high and there are massive health inequalities. Whilst the tourism strategy for Mid Wales recognises the importance of tourism and emphasises the importance of defining and developing a distinctive tourism proposition and building higher value tourism products, it does not suggest how this might be achieved. A health/spa tourism proposition would address this lack of direction and vision offering employment and health benefits for the indigenous population.

The audit of Powys’s spa towns shows that, like Bath Spa, there has been a history of people recognising the importance of the spas and attempting to regenerate the spa industry. Such attempts, e.g. in Llandrindod Wells, have failed because the proposition promulgated has not matched market needs and attracted visitors in. It is imperative that any new initiative develops a viable market proposition that reflects today’s spa market and health and wellness focus rather than offering cures for illness. A marketing strategy and brand offering the potential to link to other local products and develop new products through brand extension is essential. Such an initiative must work within the extant political framework, draw on policy initiatives, and bring together key public and private sector stakeholders. However, there is not a good track record for leadership by the public-sector in Powys and this is a critical issue that must be addressed.

The next chapter will present a blueprint for developing Powys as a competitive health/spa tourism destination and will develop an action plan for the implementation of a Powys Health and Wellness Trail.
CHAPTER 8

BLUEPRINT AND ACTION PLAN FOR THE POWYS SPA AND WELLNESS TRAIL

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CHAPTER 8

BLUEPRINT AND ACTION PLAN
POWYS HEALTH AND WELLNESS TRAIL

8.0 INTRODUCTION

This study shows that Powys has a tourism industry with unfulfilled potential which would benefit from the development of a coherent market proposition that builds on its comparative advantage to achieve competitive advantage. In particular health/spa tourism could provide the basis for such a proposition, and the conclusions emanating from chapters 5, 6 and 7 identify the building blocks for the creation of a competitive health/spa tourism destination as a vehicle for economic regeneration in Powys.

This chapter will discuss how the critical building blocks for the health/spa tourism proposition might be assembled and operationalized in Powys through the development of a blueprint. Key stakeholders who need to be involved in the customization of the concept to the specific needs and context of Powys will be identified and an outline action plan developed. Implementation of the blueprint would lead to the creation of high-quality, well-paid jobs for local people in a number of sectors, including light manufacturing, pharmaceuticals, complementary therapies and professions allied to medicine as well as agri-food and tourism. This economic development initiative would be underpinned by high-quality training provided locally in world-class facilities with excellent staff.
8.1 BUILDING BLOCKS FOR THE HEALTH/SPA TOURISM PROPOSITION IN POWYS

Figure 8.1 shows the framework for a competitive health/spa tourism destination to convert comparative advantage to competitive advantage that emerged from the literature review. Chapter seven identified through the audit of Powys focusing on each of the elements of the framework. In this chapter each of the elements will be discussed in turn to show how the case studies presented in Chapters 5 and 6 inform the development of the blueprint.

![Framework for a competitive health/spa tourism destination](image)

Figure 8.1: Framework for a competitive health/spa tourism destination

The five recommendations for developing the health/spa tourism proposition in Powys as outlined in Chapter 7 are focused on the development of a Powys Spa and Wellness
Trail complemented by supporting products and programmes across the region and are shown as follows:

1. **Powys Spa and Wellness Trail**
   - Powys Spa and Wellness Trail Short Stay Activity Break
   - Powys Spa and Wellness Trail Corporate Fitness Breaks
   - Powys Spa and Wellness Trail Pamper Weekends
   - Powys Spa and Wellness Trail Gourmet Weekends
   - Powys Spa and Wellness Trail Healthy Lifestyle Weekends

2. **Powys Spa and Wellness Programme**
   - Powys Spa and Wellness Trail Remise-en-forme Treatments
   - Powys Spa and Wellness Trail Thalassotherapy Treatments
   - Powys Spa and Wellness Trail Stress-buster Treatments

3. **Powys Health/Spa Training Academy and Centre of Excellence**
   - Powys Spa and Wellness Trail Welsh Cuisine courses
   - Powys Spa and Wellness Trail Welsh Language Courses
   - Powys Spa and Wellness Trail English as a Foreign Language Courses

4. **Powys Spa and Wellness Trail Industrial Park**

5. **Powys Spa and Wellness Trail Branded Products**

The point of the Powys Spa and Wellness Trail (see Figure 8.2) is to create a coherent health/spa tourism package as a market proposition, functionally (by sharing facilities, passing on clients for specialist treatments, sharing knowledge and best practice in health/spa product development) and geographically (encouraging visitors to tour to find the treatment/event/activity that meets their requirements).
It is anticipated that the Powys Spa and Wellness Trail will be instrumental in:

- Developing a variety of short breaks based on remise-en-forme and thalassotherapy treatments;
- Securing research into new product development to encourage commercial expansion;
- Offering the opportunity for local agricultural diversification, e.g. the production of organic food products to match the emphasis on lifestyle promoted by health/spa tourism;
- Using local products, e.g. locally-sourced essential oils to produce complementary therapy products;
- Encouraging leisure centres to extend their remit to incorporate products/programmes and activities aimed at health/spa tourists in line with the spirit of the proposed health/spa programme which will enable them to increase their visitor numbers;
- Creating the demand for fully-trained staff which will mean that the skills of the local population can be improved to enable the exploitation of the physical resources and ambience of the region;
- Developing a Powys brand and ensuring that products meet the quality standards underpinning the brand and any associated provenance marks to signify product quality, creating opportunities for new product development by small and medium-sized local enterprises.

Thus the blueprint is based on key elements from the theoretical model developed in chapter three informed by the experience from the Auvergne, Saint Malo and Bath Spa case studies in chapters five and six assembled into a market proposition based on the audit of Powys in Chapter 7. The blueprint will enable Powys, Mid Wales/VisitWales/WAG to deliver on the four priority areas for action set out in the strategic aims of the National Tourism Strategy for Wales Achieving Our Potential (WAG 2006), i.e.:

8.1.1 COMPARATIVE ADVANTAGE

Powys undoubtedly has the appropriate comparative advantage on which to base its health/spa tourism proposition – its reputation as a former spa region, the natural beauty of its landscape and its people. It does not however promote a coherent image of its tourism offer with its towns vying for the attention of potential visitors. The Auvergne Powys Spa and Wellness Trail provides the basic concept on which the blueprint is based and provide a useful way of 'joining the dots' to develop a linear route drawing visitors through the region to sample its various delights.
8.1.2 INFRASTRUCTURE

In terms of infrastructure to support the health/spa tourism blueprint there are hospitals in Ystradgynlais, Brecon, Builth Wells and Llandrindod Wells. There are also secondary schools in Ystradgynlais, Brecon, Builth Wells and Llandrindod Wells. Coleg Powys has a presence in Ystradgynlais, Brecon and Llandrindod Wells.

Transport is a more complex issue. Travel by car is reasonably straightforward. Entering the region through Ystradgynlais – 15 minutes from the M4 along the A4067 the Powys Spa and Wellness Trail would run northwards on the A4067 through Crai and turn right onto the A40 and into Brecon. From Brecon the trail continues on the B4520 through Upper Chapel and left on the B4519 turning left onto an unclassified road to reach Llangammar Wells. From Llangammar Wells it is a short run along the unclassified road to Llanwrtyd Wells. The Llanwrtyd Wells to Builth Wells and the Builth Wells to Llandrindod Wells legs of the trail both run along the A483. From Llandrindod Wells the A4081 cuts across to the A470 running to Rhayader from where a left turn onto the B4518 takes the trail up to the Elan Valley Reservoirs (see Figure 8.2).

Travelling by public transport is not quite so straightforward and would involve a combination of buses and trains. The Swansea to Shrewsbury train stops in Llanwrtyd Wells, Llangammar Wells, Builth Road (which is about eight miles from Builth Wells) and Llandrindod Wells. Therefore to follow the trail from Ystradgynlais one would need to reach Ystradgynlais by bus using services running from Swansea. Similarly travel from Ystradgynlais to Llanwrtyd Wells could be achieved by bus. The Llanwrtyd Wells to Llangammar Wells and Llangammar Wells to Builth Road legs of the journey could be travelled by train. From Builth Road a bus would carry visitors to Builth Wells.
Chapter 8: Blueprint and Action Plan: Powys Spa and Wellness Trail

Builth Wells to Llandrindod Wells and Llandrindod Wells to Elan Valley Reservoirs similarly could be travelled by bus.

Telecommunications in the area is on a par with any other rural area in the United Kingdom, i.e. it is good in parts, despite VisitWales proclaiming various parts of Wales to be: 'areas of outstandingly bad mobile reception' (see Figure 8.3).

Figure 8.3: VisitWales promotion of parts of Wales as areas of outstandingly bad mobile reception (Welsh Assembly Government 2008).

8.1.3 TOURISM SUPERSTRUCTURE

Obviously spa needs to be at the heart of the health/spa tourism destination. There are spas in each of the towns along the Powys Spa and Wellness Trail apart from Ystradgynlais and the Elan Valley. However, both Ystradgynlais and the Elan Valley link to the health/spa theme: Ystradgynlais by acting as the gateway to the Powys Spa and Wellness Trail and an ideal site for an Industrial Park on the lines of Vichy's
Bioparc; the Elan Valley through extension of the water theme and the rich diversity of adventure activities on offer there.

The spa proposition needs to be supported by high-quality accommodation - ideally a spa hotel or a five-star hotel near a spa. Closest to Ystradgynlais is the Maes-y-Gwernen hotel in Abercraf which promotes itself as a holistic hotel. In Brecon is the Peterstone Court Luxury Spa Hotel. In Llangammarch Wells is the Lake Country House and Spa Hotel. Also in Llangammarch Wells is the Cammarch Hotel which is not a spa hotel but is a walking and mountain biking centre and offers over five miles of fishing along the rivers Cammarch and Irfon. In Llanwrtyd Wells, despite its embarrassment of riches in terms of its events schedule, there is no spa hotel although it has the Lasswade Country House Hotel and the Neuadd Arms Hotel which would be a good base for walkers. In Builth Wells there are two hotels of an appropriate calibre to support the health/spa tourism proposition - the Caer Beris Manor Hotel is a major conference hotel and the Llangoed Hall Hotel. Llandrindod Wells has one spa hotel - the Hotel Metropole – and two other hotels of an appropriate calibre – The Commodore Hotel and The Glen Usk Hotel – plus one guest house – The Highland Moors Guest House. In Rhayader and the Elan Valley there are a number of accommodation providers – small hotels, pubs, bed and breakfasts. There is however no spa hotel. Many of these providers have high-quality restaurants and their food offer could be further developed to support the health/spa tourism proposition.

On the lines of the offer at La Bourboule, Wales has a rich portfolio of activities to support its health/spa tourism proposition, including abseiling and climbing, caving and diving, fishing and mountain biking, horse riding and pony trekking (see Figure 8.4). Each of these activities, e.g. mountain biking, is developed in more detail on specialist websites (see Figures 8.5 and 8.6). Activity tourism is of particular interest to
VisitWales in developing its tourism strategy and comes under the banner of green tourism. Similarly Powys has a rich and diverse set of attractions as identified in Chapter 7.

Figure 8.4: Visit Wales UK Wales Active (Welsh Assembly Government 2008).

Figure 8.5: Mountain biking Wales Rough Rides (http://www.roughrides.co.uk/)
8.1.4 HUMAN RESOURCES

Table 8.1 identifies the population in each of the towns along the Powys Spa and Wellness Trail. As emphasised in Chapter 7 whilst unemployment is relatively low, average wages and household incomes in Powys are amongst the lowest in the United Kingdom. The health/spa tourism proposition would provide a focus for economic development and a diversity of jobs as outlined in Chapter 5, many of which would be high-quality jobs with few career prospects. Tourism is often criticised for providing only poorly-paid employment with poor career opportunities (e.g. Jones and Haven-Tang, 2005). The spa/health variant of tourism has a more glamorous image and the potential to attract high-spending market segments.

<table>
<thead>
<tr>
<th>Town</th>
<th>Population</th>
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<tbody>
<tr>
<td>YSTRADGYNLAIS</td>
<td>8,200</td>
</tr>
<tr>
<td>BRECON</td>
<td>7,500</td>
</tr>
<tr>
<td>LLANGAMMARCH WELLS</td>
<td>475</td>
</tr>
<tr>
<td>LLANWRTYD WELLS</td>
<td>601</td>
</tr>
<tr>
<td>BUILTH WELLS</td>
<td>2,352</td>
</tr>
<tr>
<td>LLANDRINDOD WELLS AND THE ELAN VALLEY</td>
<td>5,024</td>
</tr>
</tbody>
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Table 8.1: Population of each of the towns along the proposed Powys
8.1.5 TRAINING

The health/spa tourism proposition would open up an enormous demand for generic and specialist training. Across all job roles one priority in terms of generic training would be the development of transferable skills amongst which interpersonal skills and the provision of a professional, caring ‘welcome’ to ensure satisfied customers return would be paramount. Tourism Training Forum for Wales has recently overhauled its Welcome Host programme and launched its successor – Croeso Cynnes – on 16 October 2008 (Tourism Training Forum for Wales, 2008).

Coleg Powys is well placed to support the training need and to develop new bespoke courses. New further education courses could be developed on Coleg Powys’ own initiative. New higher education courses could be developed in partnership with appropriate departments in higher education institutions across Wales, e.g. the new Medical School in Swansea University for specialist health/spa-oriented medical practitioners; the Welsh School of Pharmacy at Cardiff University for support in relation to the formulation and production of phytochemicals and pharmaceutical/cosmetic products; the National Centre for Product Design and Development Research at UWIC in relation to the development of health/spa tourism-related equipment. Coleg Powys already has a good track record of working in partnership with higher education institutions across Wales, including: UWIC; the University of Glamorgan; University of Wales, Lampeter; Newport University.

There is also a need for the development of courses which are likely to straddle the further and higher education divide, e.g. for:

- **Facilities and Activities** - customer service, management, sports and leisure facilitators, instructors and supervisors;
- **Manufacturing** - management, production, sales and marketing;
Therapists - a full range of courses available from an informal weekend for nail treatments through to NVQs in hair and beauty to higher education courses in sports therapy and tourism development.

What all this adds up to is the potential for regional development and regeneration based in a self-sustaining local economy, using the indigenous natural and human resources of Powys. The Powys Spa and Wellness Programme would make diet and nutrition a central and integrated part of an individual’s treatment regime to complement the fitness and lifestyle management element of the programme. The cuisine of participating hotels would be based on the use of local (organic) produce thus further enhancing linkages to the local economy. It would however be customized to meet the needs of this market segment but based on dishes that are low-salt, low-sugar, low-cholesterol and high-complex carbohydrates which are the recognised approaches to eating for health.

Regular gourmet food demonstrations, banquets and weekends could be organised in participating hotels using local produce which might well stimulate the production of an increasingly diverse range of premium (organic) foods. This feature would ensure that health tourists do not feel deprived, thus enabling them to learn that control over eating habits is not only possible, but highly pleasurable. Critical to the success of this element is that the food is produced by appropriately trained and qualified catering personnel and that specialist staff are available to offer nutritional advice as required. Coleg Powys with support from various higher education institutions across Wales could deliver courses covering:

- a range of complementary therapy courses including thalassotherapy courses and de-stress/detoxify programmes;
courses in practical management for running health/spa tourism facilities, SMEs, pubs restaurants, small factory enterprises;
- catering courses, particularly incorporating healthy food and healthy eating, as well as nutrition courses;
- design engineering courses for the design and manufacture of health/spa equipment;
- courses in pharmaceutical chemistry to support the extraction of phytochemicals from local organic produce and their incorporation into unique locally-sourced and branded products;
- courses in agri-diversification to encourage crop diversification and the growing of organic produce, e.g. lavender fields.

8.1.6 LINKS TO OTHER SECTORS
Local businesses in Powys should be encouraged to gather behind the health/spa tourism proposition on the lines of the Vichy Bioparc producing Powys Spa and Wellness Products to be used in the treatments comprising the Powys Spa and Wellness Programme. This encouragement could be reinforced by the offer of capital grants for buildings and plant from WAG through their diverse regeneration funding pots and for individual businesses through the newly-announced (in mid-2008) Single Investment Fund. PCC also has a number of funding pots open for economic development initiatives. The various authorities could offer match funding to support applications to the Regional Competitiveness and Employment programmes which cover the East Wales region, including Powys (see Figure 8.7). The Regional Competitiveness and Employment programmes replace the former separate European Structural Funds (ERDF and ESF).
Figure 8.7: Map of Wales showing eligibility for Regional Competitiveness and Employment (Welsh European Funding Office, 2008)

A range of unique treatments using locally-made products could be developed under the health/spa tourism banner in conjunction with the expertise of Coleg Powys and higher education institutions across Wales. By integrating local and European expertise the programme could offer, for example, facial and body treatments using locally-developed skin-care products and fango treatments using clay and mud sourced locally and incorporated into mud baths, massage oils, detoxification products, cellulite treatments all based on Powys-grown produce. GLASU, the LEADER+ group in Powys, could take responsibility for developing these innovative products from local sources and be instrumental in promoting development of health/spa products. Clearly this would need to be underpinned by market research to ensure any such products are financially-viable. The opportunities for diversification and new enterprise within Powys would be considerably enhanced through the focus provided by the Powys Spa and Wellness Programme.
There would be a real benefit were these products to be gathered in one area - benefits of scale and immediate sharing of information would add to the site securing a nationwide reputation as a centre of excellence for the health/spa industry supported in relation to knowledge exploitation and technology transfer by Coleg Powys and the various further and higher education institutions across Wales according to their particular expertise. Woodland Park, Ystradgynlais would be well placed given its close links to the M4 motorway and the ready supply of local labour as found in the Bioparc model in Vichy. The regionally-branded products could then be sold in outlets working in partnership with T/VICs.

8.1.7 FESTIVALS AND EVENTS
The region, apart from Ystradgynlais, already has a well-developed events programme. The focus provided by the health/spa tourism proposition would enable more events to be developed to underpin the concept and ensure that there are events throughout the year to attract people to the region, countering seasonality and reinforcing the health/spa tourism image.

8.1.8 COHERENT MARKETING AND PROMOTION
The region does not currently have a coherent marketing strategy - vertically or horizontally. Towns across Powys have their own promotional materials. One lesson from the Auvergne relates to the coordinated promotion of the regional health/spa tourism product through the Comité Régional de Développement Touristique d'Auvergne with its regional materials and standardised brochures on each spa town. A coherent marketing strategy to underpin the health/spa tourism proposition is essential. As will be seen in Section 8.2 there needs to be an organisation specifically focused on the development of the health/spa tourism proposition, i.e. the Health/Spa
Tourism Partnership (HSTP), and taking responsibility for coordinating the health/spa tourism marketing initiative.

8.1.9 BRANDING

In terms of the branding of health/spa tourism in Mid-Wales, it should take its lead from both France and Bath and exploit the longevity of its spa traditions in Llandrindod Wells, Builth Wells, Llangammarch Wells and Llanwrtyd Wells, but develop a modern interpretation with the emphasis being on health, wellness, outdoor activities, fitness and remise-en-forme / thalassotherapy. An agreed regional branding scheme, and joint-marketing for the spa towns would encourage individual promotions for each town within the strategy.

Policy on marketing and branding needs strategic thinking supported by local implementation. This policy structure needs to facilitate advice on the regional mix of health/spa tourism facilities, marketing, pricing, best practice, business support and training. This requires appropriate liaison between bodies to ensure that resources are released in a timely and coordinated manner to secure agreed outcomes that will deliver health/spa tourism. Clearly, there are a number of stakeholders – the public sector organisations responsible for economic development, tourism and marketing and skills development – and private sector – i.e. the operators. However, existing bodies can be used to address these issues. To achieve this they will need to refocus some of their policies and accommodate the integration of the blueprint into their development strategies. There is little need for entirely new bodies – simply the adaptation of current practices although these bodies would need to make their support for the health/spa tourism proposition explicit.
Chapter 8: Blueprint and Action Plan: Powys Spa and Wellness Trail

A primary building block for the successful promotion of health/spa tourism would be the development of a partnership between the public sector (i.e. WAG, PCC and Coleg Powys) and the private sector (e.g. hotels, guest-houses, restaurants, farmers-markets, private beauty and holistic therapy centres, activity providers and attraction operators). This partnership would extend opportunities for:

- producing equipment and materials to support a Powys health/spa tourism initiative;
- using indigenous resources, such as mud, flowers and herbs;
- developing skills through locally-developed and delivered skills training programmes.

All of these factors can be exploited under a regional marketing theme of a Powys Spa and Wellness Trail. This is the development of all the available historic sites, with new facilities added over time to increase the offer, linked by purpose, marketing and function. With the focus sharply on the future, this model would mean added-value tourism with facilities that exceed visitor expectations provided that the right policies are in place at the outset with business development planning, education and training developed and geared to respond to the demands of the industry.

8.2 IMPLEMENTING THE BLUEPRINT

First, there is a national policy context in Wales, WAG is the lead body for setting economic development policy in Wales and opening the portals to resources and finance. At the time of writing this thesis, economic development in Wales was under the remit of the Department for Economy and Transport (DE&T). Tourism and Marketing – VisitWales - in contrast, was in the Department for Heritage with a link to DE&T. Wales was divided into four economic regions: North; Mid; South-east and South-west. Economic development in each region was led by an economic forum and
tourism and marketing by a Regional Tourism Partnership. Powys is in the Mid Wales region and is part of the Mid Wales Partnership which provides

>a strategic framework for Mid Wales within which the private and public sectors can ensure the prosperity of the area through partnership activities across appropriate economic, social and environmental priorities; and will champion and actively represent the issues which confront rural Mid Wales

(Mid Wales Partnership 2004) and the Tourism Partnership Mid Wales (TPMW)

The Partnership is responsible for the strategic development and promotion of tourism in Ceredigion and Meirionnydd as well as in Powys and is funded by WAG. Its declared remit is to

>develop a dynamic and competitive tourism industry for Mid Wales that fulfils its [sic] potential in contributing to the region's economy and sustaining its communities, culture and environment

(Tourism Partnership Mid Wales, 2008).

At a more local (Powys) level, the Powys Regeneration Partnership (PRP) was established in 2000. PRP comprises 165 organisations from the private, voluntary and public sectors. The main aim of PRP is to ensure that European funding is used in a coordinated, integrated and sustainable way to promote economic, community and environmental regeneration in Powys. Through its board, PRP is involved in overseeing the European funding programmes in Powys which could be used as the principal vehicle to support a sub-group specifically geared to developing the context for the spa industry and the implementation of the blueprint. For the purposes of this thesis this sub-group will be termed HSTP.
8.3 ACTION PLAN

There will need for HSTP to be supported by the other agencies and to focus on the following actions:

- Encouraging the public and private sectors in Powys to rally around the clarion call of the health/spa tourism proposition (Lead: PCC, MWP, TPMW and HSTP);
- Coordination of policy at a national and local level to provide an appropriate policy context for the health/spa tourism proposition (Lead: WAG, PCC and PRP);
- Developing a consensus on the details of marketing and branding (Lead: WAG, TPMW and HSTP);
- Agreeing and project managing strategic capital build projects (Lead: HSTP);
- Agreeing the requisite training courses and their content (Lead: HSTP);
- Adapting existing standards and practices in health/spa facilities to a specific health/spa industry standard (Lead: VW);
- Securing applications for European and other funding for training and capital build projects from WEF and WAG with support from appropriate partners (all partners).

There is a split between the all-Wales level, the Mid Wales level and the Powys local level. At the national level this can be accommodated by staff in WAG’s DE&T and the Department of Heritage by each having a health/spa-specific brief to promote the development of the health/spa industry in Wales. This would ensure tight links to the policy context for Wales and give support for PRP in promoting the health/spa tourism agenda through HTSP (see Table 8.1). HTSP would need to have staff resources to manage its programme and communicate its decisions. Obviously the skills training side cannot be ignored and links to the Tourism Training Forum for Wales and the Department for Children, Education, Lifelong Learning and Skills (DCELLS) will be critical. This process would give legitimacy and co-ordination of the development of
the health/spa tourism industry. With this structure in place the details of the blueprint can be implemented.

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<tr>
<th>Level</th>
<th>Economic Development</th>
<th>Tourism and Marketing</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Department for Economic and Transport</td>
<td>Department of Heritage/Wales</td>
</tr>
<tr>
<td>Mid-Wales</td>
<td>Mid Wales Partnership</td>
<td>Mid Wales Tourism Partnership</td>
</tr>
<tr>
<td>Powys</td>
<td>Powys Regeneration Partnership</td>
<td>Powys Health/Spa Tourism Partnership</td>
</tr>
</tbody>
</table>

Table 8.1: National and regional support for economic development and tourism and marketing for Powys Regeneration Partnership and the Powys Health/Spa Tourism Partnership

8.4 NEXT STEPS

The next steps need to be carefully thought through. It is as much a matter of winning hearts and minds as revealing the evidence. The concept for a Powys Spa and Wellness Trail and associated products needs to be owned by a number of stakeholders, locally by the public and private sector in Powys and regionally and nationally by the public-sector organisations leading the promotion of economic development, tourism and marketing and skills development in Mid Wales (Mid Wales Partnership and the Tourism Partnership Mid Wales) and the various departments in WAG (notably DE&T, Department of Heritage/Visit Wales and DCELLS) and the Tourism Training Forum for Wales. Time spent in briefing officials will be well rewarded in the longer run as they have regular access to the politicians and this project, were it to fly, and would be given the power for take off from political, not technical, decisions.
8.5 CONCLUSIONS

The principal proposals of the blueprint are a combination of new capital projects and the refurbishment of existing establishments (the form, content and location to be agreed by the local and national structures through a bidding process based on the existing system to bid for funds from Europe) and coupled with the development of appropriate training. The blueprint centres on new-build capital projects which occur:

- *in a revitalised and extended health spa at the Rock Park, Llandrindod Wells,*
- *in a centre of excellence and training academy based on the Coleg Powys campus site in Brecon, exploiting and developing the existing training facilities;*

Whilst this action plan is geared specifically towards the situation in Powys, it could be transferred to other regions that seek to use health/spa tourism as a driver for economic development – either for regeneration of a defunct spa industry, or as a start-up to develop modern remise-en-forme. To be successful there needs to be recognition at a national, regional and local level that health/spa development has integrity as a concept and that the various layers of government are prepared to support it. They will be the guiding hand in policy development that will set the context for investment, the direction of financial resources and the tone/character of the branding and marketing – especially in the international arena.

Moreover, the involvement of the regional government will be critical in a European context to secure financial aid from the European community. In any similarly-placed region elsewhere in the world, cognisance must be paid at this level to inter-regional opportunities as well as financial incentives that may be available from any trading group and community of regions / countries.
Having set up this over-riding position, no implementation will take place without the involvement of the tourism operators themselves in conjunction with support agencies to facilitate development. A feature of the recent history of economic development in Mid Wales and discussed in Chapter 7 is the partnerships which were often set up in response to specific demands from the EU – that have flourished as organisations, but actually failed to act in concert. For instance, the PRP’s purpose was to ensure group agreement on the projects for European funding and allocation of resources. In reality, the rules covering the use of European funding and the need for matching funding from the participant, meant that it was the projects that fitted the criteria that were implemented. The Community Regeneration Toolkit, also funded by Europe, equally prescribed eligible expenditure, meaning that the projects implemented were fragmented and incidental although worthwhile in themselves. Instead, if health/spa tourism is genuinely to act as a driver, then the chosen projects must contribute to an overall plan with agreed timescales.

So the pre-conditions for action are:

- National government (i.e. WAG) and its regional manifestations (MWP and TPMW) developing a policy context and devolving appropriate financial and other resources for action;

- A local partnership – SHTP - with executive powers to coordinate the implementation of the action plan on behalf of PRP.

The overall objective is rather to secure long-term, more sustainable development that makes sense of capital investment for all parties and is soundly based on an agreed brand that endures. Within this, the pace of implementation will vary according to the needs and direction of the operator / agency.
At the heart of this is the need to agree the branding of the region through the structures put forward in this chapter. If the partners are divided on the image they wish to portray, then the result will be a fragmented project that will not come to fruition. If Powys is to rise phoenix-like from the ashes of its past, then it must act collaboratively to provide a vision for the future that is consistent with its comparative advantage to achieve competitive advantage.
CHAPTER 9

CONCLUSIONS AND
RECOMMENDATIONS

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CHAPTER 9

CONCLUSIONS AND RECOMMENDATIONS

9.1 INTRODUCTION

This chapter concludes the thesis. It opens with a review of the objectives in section 9.2. Section 9.3 presents the major findings of the research whilst section 9.4 shows the research contributions. 9.5 show the limitations of the research. The opportunities for further research are shown in section 9.6 and the chapter concludes with some of the author's personal reflections.

9.2 REVIEW OF THE OBJECTIVES

The primary aim of the thesis has been to develop a framework for a competitive health spa tourism destination in Mid Wales. To explore the potential of health/spa tourism and specifically a spa trail through the development of a blueprint for economic regeneration in Mid and South Powys. The parameters of the study were set by five specific objectives:

1. Undertake a critical review of relevant literature on health/spa tourism and destination competitiveness to develop a theoretical model of best practice for a competitive health/spa tourism destination.

2. To identify and analyse case studies of traditional and remise-en-forme health/spa tourism destinations in the Auvergne region and Saint Malo in France to provide an in-depth analysis of specific elements of the framework for a competitive health/spa tourism destination developed in objective 1.
3. To identify the key issues in the implementation of a major public/private sector spa tourism regeneration project.

4. To audit the resources in Mid and South Powys which can be exploited for the development of health/spa tourism trails and thus regenerate Mid and South Powys as a health/spa tourism destination and contribute to its economic regeneration.

5. To develop a blueprint for the economic regeneration of Mid and South Powys using the vehicle of health/spa tourism and focusing on the development of a spa trail.

**OBJECTIVE ONE:** Undertake a critical review of relevant literature on health/spa tourism and destination competitiveness to develop a theoretical model of best practice for a competitive health/spa tourism destination.

With spas holding a long tradition in Europe and in the UK since Roman times, the review revealed that there is wide variation in the interpretation of health tourism but that this has principally centred on whether it is about curing illness or promoting wellness. Whilst there is still some emphasis on curing illness, at least in part, in France, there is recognition by some researchers the reality is that the long-term future of the industry lies in promoting wellness and relief from stress. As such, health/spa tourism can also be seen to be a genuine promoter of economic development not only by developing an infrastructure to offer treatments for customers, but also by offering training and jobs for local people. Health/spa tourism is also in the interests of society at large since it offers mechanisms to reduce stress, which, in the 21st century, is a major cause of lost working time and increased costs to the health service. So as a
proposition it has real potential for economic development in Mid Wales over the longer term. The challenge for Mid Wales will be to turn comparative advantage to competitive advantage. The literature review concludes with a framework that shows the key elements for the promotion of an integrated health/spa tourism industry (see Figure 9.1).

![Framework for a competitive health/spa tourism destination](image)

**Figure 9.1: Framework for a competitive health/spa tourism destination**

**OBJECTIVE TWO:** To identify and analyse case studies of traditional and remise-en-forme health/spa tourism destinations in the Auvergne region and Saint Malo in France to provide an in-depth analysis of specific elements of the framework for a competitive health/spa tourism destination developed in objective 1.

The French system of government support for traditional spas in France has enabled them to survive, but there is evidence of a move away from offering cures to offering...
remise en forme. This is a trend very well suited to the UK health/spa industry, since there is an already well-established training system. Combining this with the element of remoteness and rurality that are the hallmarks of the success of the spas in the Auvergne region of France, then Mid Wales would seem well placed to develop a modern health/spa tourism industry. The evidence from France shows that when spas are successful, as in Saint Malo which has produced highly-successful short spa stays based on thalassotherapy and thalassoleisure, they have a real and lasting benefit to the general economy by indirect expenditure as well as capital investment. The traditional spa customer is changing in profile - from high income and high leisure time, for example in the 18th century in Vichy and Llandrindod Wells, to lower income and low leisure time in the 21st century. The facilities, branding and marketing of the health/spa industry in the new millennium need to reflect this shift towards remise en forme and relaxation.

**OBJECTIVE THREE:** To identify the key issues in the implementation of a major public/private sector spa tourism regeneration project.

Bath set off on an ambitious project to build a 21st century spa based on both its cultural and built heritage that is the envy, not just of the UK but of many other parts of Europe as well. It proved to be a technically-difficult feat, but it illustrated the need for any similar project to build on existing cultural and location strengths. Bath showed leadership and vision and achieved a funded project built by working with all stakeholders. Mid Wales offers a real opportunity in terms of location and heritage to develop a spa trail. There has to be a question mark, however, as to whether there is sufficient community leadership and commitment of stakeholders to pursue such a goal.
OBJECTIVE FOUR: To audit the resources in Mid and South Powys which can be exploited for the development of health/spa tourism trails and thus regenerate Mid and South Powys as a health/spa tourism destination and contribute to its economic regeneration.

There is undeniable potential in Mid Wales for the implementation of the health/spa tourism concept. The audit showed that there is a coalescence of factors that would provide a basis for a competitive health/spa industry in Mid Wales. With imported techniques of thalassotherapy added to the existing range of qualifications and treatments available in the UK, Powys could develop a coordinated range of short and longer breaks offering access to spectacular countryside and diverse portfolio of adventure activities and facilities. The health/spa tourism concept would be underpinned by a new-build training academy which would enhance the current training provision offered by Coleg Powys. The development of locally-grown food and other products provide opportunities to link the health/spa tourism concept to the local economy enabling Powys to build on its central and enduring strengths - its peripheral location and its outstanding countryside. The big question is: has it the ambition, business acumen and community leadership necessary to launch such an enterprise?

OBJECTIVE FIVE: To develop a blueprint for the economic regeneration of Mid and South Powys using the vehicle of health/spa tourism and focusing on the development of a spa trail.

The principal elements of the blueprint combine new capital projects (i.e. an expanded health spa at Rock Park, Llandrindod Wells and development of a Centre of Excellence and Training Academy at the Coleg Powys campus in Brecon to enhance the existing training facilities) with the refurbishment of existing establishments through European-funded public-private partnership projects. These are underpinned by appropriate training. Success requires recognition by key public-sector stakeholders at national, regional and local level of the integrity of the health/spa tourism concept and its
appropriateness for Mid Wales so that they can provide the essential leadership for the project. Coherent regional branding will provide a framework within which not just for health/spa tourism products but as an umbrella within which other regional products can be promoted. This will overcome the fragmentation that is evident in the marketing of Mid Wales today where individual towns champion their tourism product. If Powys is to rise phoenix-like from the ashes of its past, then it must act collaboratively to provide a vision for the future that is consistent with its comparative advantage to achieve a competitive advantage.

9.3 MAJOR FINDINGS

The study reveals that:

- The theoretical model for a competitive health/spa tourism destination works well in France and would be transferable to other destinations both within and outside Europe.
- The French traditional spa industry is too dependent on financial support from the French Government. This shortcoming needs remedying or they will threaten the sustainability of its spa industry.
- There are questions raised about how the whole spa industry faces 21st century demands for health and wellness products and develops an appropriate branding and marketing strategy.
- The model developed in this study could be applied to Powys using the now-defunct spas and linking to other sectors, e.g. adventure tourism, to create competitive advantage.
- In Powys this would require a public/private partnership around the delivery of a coherent vision of a health/spa regeneration project.
Chapter 9: Conclusions and Recommendations

- The case study of Bath spa suggests critical issues – e.g. leadership and risk assessments must not be underplayed.
- That the Powys track record in relation to the regeneration of the eighteenth century spa industry in Powys and the Llandrindod Wells Urban Regeneration Programme suggests identification of appropriate community leadership will be an issue.
- The blueprint and action plan for a Powys Spa and Wellness Trail requires private sector and national, regional and local public sector commitment which will be critical to success.

The findings also reveal that the comparison between Powys and France must be moderated through recognition of the cultural – both political and social – differences between rural France and rural Wales. France is an amalgam of a number of different kingdoms and self-governing autonomous regions, with a legacy of self-reliance and self-sufficiency. Climate and natural resources have helped to allow a wide diversity of produce and industry to support each region.

In Wales, by contrast, the natural resources are more limited in their range and the climate and mechanisms of government (autocratic and centralised until recently) have further inhibited the opportunities for a self-sustaining self-sufficient economy. Culturally too, Powys has never demonstrated any kind of recognisable unity of tradition that would lead to a commonality of purpose and a striving towards self-governance. Rather, the towns and villages of Powys have been dependent on the markets provided through the nearest urban areas – often in England. Poor communications, harsh topography and a largely inhospitable climate have contributed as well to this lack of coherence in endeavour.
History is, potentially, a constraining factor on the future opportunities for Powys. This study has identified a range of opportunities and mechanisms to realise those opportunities, but the raw resource of implementation is the will and interest of local entrepreneurs and others to seize the day. There is no evidence of any such zeal in the past. It would require confidence, self-belief and a great deal of chutzpah to take up a new deal on health/spa tourism, however many easy stages it is broken into.

Clearly the proposition for a health/spa tourism destination needs to be pulled together in a way that can be communicated to different stakeholder groups so that it can be taken forward. The people of the towns in the Powys Spa and Wellness Trail deserve more than they currently have in terms of economic development opportunities and a vision for the future - a new ‘big idea’ like health/spa tourism would give the region a new identity and profile. It would require an act of imagination and a leap of faith by the communities involved to actualise their own long-term future in an articulated vision. Enduring for the area is its physical character and natural outstanding beauty and the helpful, friendly indigenous population, with the industrial past and traditional spa past now finished and declining in memory, the future for the region will be different, if it implements the health/spa tourism concept the futures will be based on its inalienable characteristics of the mountains, the valleys and the streams.

9.4 CONTRIBUTIONS

In terms of contribution to theory the thesis offers a framework for a competitive health/spa tourism destination which has enabled the development of an enhanced understanding of the key issues relating to the exploitation of health/spa tourism as a driver for economic development and the development of a competitive health/spa
tourism destination. The framework would be transferable to other health/spa tourism destinations.

The thesis emphasised the issue of the balance between health and wellness and comes clearly down on the side of spa for wellness as opposed to spa for cure as the basis for the health/spa tourism proposition. The prevailing social security system in France is unable to sustain spa tourism based on cure and those spa destinations not offering new thalassotherapy and remise-en-forme approaches to spa treatments, as was observed in the Châtel-Guyon case study, face a bleak future.

Linking health/spa tourism to a wider set of market propositions, as appropriate, e.g. conference tourism and activity-based tourism seems to be the key to success as exemplified by La Bourboule and Vichy. The Vichy case study shows the opportunities for co-branding of products based on spa and the health and wellness proposition. All these aspects are codified into the model for a competitive health/spa tourism destination.

In terms of contribution to practice the thesis offers to Powys and Mid Wales a blueprint and an action plan incorporating the best practices from the French case studies (The Auvergne and Saint Malo) in terms of market positioning in relation to health/spa tourism and implementation in the and in terms of public-sector leadership for a major capital build project from Bath Spa through public-private partnership. It proposes a spa trail to link the spa towns in Powys into a bigger and more coherent market proposition and to develop a big statement in the marketplace. Whilst one can see elements of best practice in the French case studies they are by no means a homogenous picture of best practice and like the curate's egg, they are good in parts. The framework for a competitive health/spa tourism destination drawn from the
literature and confirmed through a holistic overview of the French spas could provide
the individual spa towns in France to re-evaluate their practices and to further develop
their product.

9.5 LIMITATIONS

There are limitations in this research. Although a blueprint and action plan for a
competitive health/spa tourism destination in Mid Wales is developed, stakeholder
consultation in relation to testing the proposition on key players in Powys, in Mid Wales
and nationally through the WAG was not undertaken and was seen as beyond the
scope of this thesis. Informal conversations have taken place with a number of the
stakeholders, which would suggest that the proposition would complement current
activities taking place. This is in the light of the greening of tourism in Mid Wales and a
push towards promoting Wales’ rich portfolio of adventure activities.

9.6 OPPORTUNITIES FOR FURTHER RESEARCH

The work in this thesis provides a basis which opens up a plethora of opportunities for
further research. As the previous section suggested there is a major opportunity for
future research to build on the blueprint and action plan developed in the current study
and to undertake a systematic stakeholder consultation and consensus building
exercise to develop a blueprint and action plan that all stakeholders have ownership of
and are prepared to commit to and move the vision forward. This needs to be
complemented by research on core product development and on brand image. The
research has emphasised the critical importance of leadership in relation to
operationalising a vision of this kind. Research on best practice in developing
leadership capacity could inform continuing professional development for community
members and other key stakeholders.
There is a major opportunity to undertake a systematic stakeholder consultation and consensus-building exercise to develop a blueprint and action plan that offers ownership to all stakeholders and to which they are prepared to make a lasting commitment and share the long term vision. My expressed view that the whole subject is subject to the cultural position of Mid Wales, means that early work needs to engage hearts and minds in the idea, its development and its exploitation. That implies the need for community leadership and the research has emphasised the critical importance of leadership in relation to bringing a vision of this kind to fruition. Research on best practice in developing community leadership capacity could inform continuing professional development for community members and other key stakeholders. To take the ideas forward there would need to be research on core product development and on brand image.

The major constraint is the issue I pointed out earlier in this chapter: Mid Wales has no presence or political clout. It does not have sufficient influence to persuade national politicians to take the risks involved in re-investment. The stakeholders are not sufficiently organised (or more importantly, their innate pragmatism means that they do not have any propensity for collaborative action) to act as a lobbying body and so the politicians are let off lightly. They will not need to make the difficult choices of intervening opportunities since they do not have to perceive of any change in Mid Wales that takes more than existing resources. Indeed, for the pragmatic politician, Mid Wales is a place to look for public savings to be spent elsewhere on projects where lobbying is effective and needs a positive response to preserve the power base of serving politicians.
9.7 CONCLUSION

This chapter has brought the thesis to a conclusion. It has reviewed objectives, outlined the major findings and identified the contributions of the thesis. The next and final chapter will present a reflective account of my academic journey and in particular an exploration of the objectivity/subjectivity debate.
# CHAPTER 10

## THE REFLECTIVE JOURNEY

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CHAPTER 10

THE REFLECTIVE JOURNEY

10.0 INTRODUCTION

Curiosity, once stimulated, is a difficult attribute to shrug off. It was a major motivator for me in seeking to complete a PhD – a journey that started with the dissertation I completed for my MA in Education at Cardiff University in 2002. My experience should have told me to quit whilst I was ahead, but there were big and interesting topics left that I wanted to know more about. In my MA I looked at the relationships between education, training and economic regeneration in agenda setting for communities. It was necessarily narrowly focused, but it served to whet my appetite to look into the wider and more general realm of the connections between education, training and economic development.

These reflections led me to ask – where is the thinking that links these matters? who does it and how is it formulated into acceptable public policy? how is it applied? what are the outcomes? Indeed, is there any conscious and deliberate thinking objectively based on evidence in the public sector or is the truth more closely allied to Harold Macmillan’s alleged response to a journalist’s question of what was likely to put governments off their stride: “events, dear boy, events”? In other words, he cynically implied that policy is not the result of carefully thought-through analysis and planning, but more an action in response to events. I went on to reflect whether this reactive stance was equally true for communities as a whole and that their growth and change occurs only in the response made to events. If that were the only driving force, then
communities would be left only ever being able to make change in a pragmatic and optimising fashion.

This seems altogether less than satisfactory, suggesting that the fate of communities rests solely on the vagaries of the winds of change. Communities are often the subject of policy initiatives, with policies being applied to them, rather than there being any real self-determination. It seemed to me that change could come about in a more purposeful way if it was steered by strategy (i.e. policy driven) in decisions taken by leading individuals and organisations. Further, I reflected that it should be possible to take a region, analyse its characteristics and attributes, assess its needs, and from that derive policy and then implement it as an intervention to divert the economic and social course of the region to a new destination. There was purpose to this train of thought: I had in mind to look closely at the problems and opportunities of Mid Wales since I felt that its relatively poor economic state could be arrested and improved by exploiting its natural resources more thoughtfully. These were the background thoughts and the context for my study as I contemplated the prospect of embarking on a PhD.

10.1 MY ROLES

It was not a whim that made me think of Mid Wales as the context for this study. I had three good reasons for choosing it. First, I had lived there for over thirty years from 1969 to 2007 and knew it and its people well. Second, I worked in Further Education for over 20 years in the region from 1975 to 2007 and was interested in the use of training as a positive force for change and development. Third, my professional interest lay in holistic health therapies and spas. I had worked for the European Human Resource Task Force in Brussels from 1990 to 1993 and looked at training and qualifications in EU spa regions. With this experience it seemed to me that these
disciplines offered strong potential as a basis for development in Mid Wales given its history and natural resources.

My experience in the FE sector gave me a particular perspective of the education system, its processes and connections (or lack of them) with external stakeholders. I felt there could be a good deal more connectivity which would ally business growth with training and that both could be geared towards regional development. Specifically, the field I wanted to explore in this context was the spa industry.

Working within the regional development programme of the EU, I developed expertise in relation to the spa industry when looking at the potential through partnership to share and transfer knowledge and skills across Europe. My perspective was how this might fit into training regimes; I recognised that economic development and training were inter-dependent and if a region was to choose change through policy, then that policy would need to integrate fiscal and educational agendas if it was to succeed. Amalgamating this recognition with my knowledge of the area as a resident and building on the work I undertook in my MA dissertation, I felt I had all the pre-requisites to look closely at Mid Wales and its potential.

However, this extensive involvement in Mid Wales does potentially challenge one of the important principles of any PhD thesis, which is the need to ensure objectivity, both in the research and in the conclusions. Having been a resident in Mid Wales for so long was likely to mean that it was going to be difficult to be an impartial observer. I felt that that alone, and without any reference to the actual methodology used, would raise the whole issue of the extent to which a researcher can be objective about social and political matters that depend essentially on weighting judgment, rather than observing outcomes from carefully-constructed laboratory experiments.
Clearly this was an issue that I would need to address head on and be fully cognizant of, particularly as I wanted my research to turn into action by and for the people of Mid Wales. As Guba and Lincoln (2005: 207) explain: ‘any action on the part of the inquirer is thought to destabilize objectivity and introduce subjectivity, resulting in bias’. However, they go on to emphasise that: ‘objectivity is a chimera: a mythological creature that never existed, save in the imaginations of those who believe that knowing can be separated from the knower’ (Guba and Lincoln (2005: 208).

10.2 THE PROPOSITION

Notwithstanding the querulous nature of my opening remarks about the issues of change in communities, my underpinning proposition was that change does occur deliberately through a combination of a number of different stimuli - not from any one given intervention and not at any defined rate.

Policy is created by the government of the day, often conceived when out of office, and published through manifestoes which are, for all intents and purposes, written statements of their “thinking”. When in power governments give life and action to those policies through agencies and express them directly through fiscal priorities. Proactive planning is often however overtaken by events, history and culture. It is the balance between proactivity and reactivity that ultimately determines the fate of communities. So how does it all fit together – if at all? Or is it more that communities find their way simply by muddling through?

I decided to investigate Mid Wales, and specifically Powys, to bring these reflections into some kind of perspective. The choice was pragmatic (a strong word that I like because it is more than a word it is a mindset, an approach and has strong resonance
in the field of public policy-making and I will refer to it again as a motivator for action, or more often, non-action) given the roles I have outlined above.

10.3 OBJECTIVITY VERSUS SUBJECTIVITY

If the quotation attributed to Macmillan earlier is fair comment and governments do lurch through their allotted time, then there should be rich grounds for influence by rational argument and conviction alone. In reality that does not appear to be the case. In academic terms, the approach of Mid Wales to its opportunities could be described as subjective. The community, of Powys does not divorce its needs and how to achieve them from its emotions, feelings and values via its leaders or through the public plebiscite, that drive it. In other words objectivity is in short supply. As an active participant in the socio-political world of Mid Wales I have recognised that in conducting my research I would have difficulty in extracting myself from that subjective position and adopting a wholly objective position to validate the academic approach. But I am not alone in recognising that this is an essential and ongoing dilemma for academics when researching real-life social situations that are themselves changed by the observer. I find this reflected in the work of Professor Brian Wheeller (2006: 1:11) when he says:

_Emotive subjectivity as well as so-called ‘clinical objectivity has, I believe, a vital, pivotal role to play in subject development (Wheeller 2005b). That we should not be too academic in our approach – either with ourselves or our subject – is a recurring personal theme that comes through strongly in my writing (as well as in my lecturing and conference presentations)._"

He continues by saying:

_My work is primarily based on ‘observational empiricism, qualitative not quantitative, subjective rather than objective, personal as opposed to remote – more richer, less arid as a result._

(Wheeler, 2006: 1.11)
On this basis my personal involvement and insider insights become a strength not a weakness and my qualitative research born out of observational empiricism, potentially subjective but not biased is good rich research that will provide a fertile basis for action.

**10.3.1 THE RESIDENT’S TALE**

Over the last thirty years, as a resident, I have seen considerable change in the character of Mid Wales. When I first lived there, settlements were characterised as close-knit - there was little crime, back doors were left open and people 'looked out' for each other. Agriculture was still the main stay of the area with only Ystradgynlais boasting the “traditional” heavy industry of coal mining. Sure, the economy was in decline and it was a sparse population with a largely low-wage economy, but it was socially stable and vibrant.

To pinpoint when it started to move away from that model is not easy, but a real change came with local government reorganisation in 1974 when the three counties (Breconshire, Radnorshire and Montgomeryshire) of the old kingdom of Powys were made into district councils with an overarching county council, named Powys, responsible for “countywide” matters, such as education, highways and social services. For local people this was more than simply a change to a more efficient system of government: it was tantamount to removing the cherished independence of self-governance in the old counties with their different styles and modes of operation. This has been a rich area of research into local government studies but is not the primary focus of this study although it has implications for it. Traditions, attitudes and customs differed between Brecon, Llandrindod Wells and Newtown: and the local government reorganization that brought the three counties into amalgamation was, I perceived anecdotally from my interaction with other residents, an unwelcome dilution.
decision to locate the new county building centrally in Llandrindod Wells rather than the larger town of Newtown caused considerable bad feeling in the north and the south, with a charge of unfairness claimed by all sides; but it was good decision for Llandrindod Wells in boosting employment and injecting much welcome income into the town.

Brecon, Rhayader and Builth Wells were long-established market towns with farming communities. Llandrindod Wells was a relatively new purpose-built spa town with ornate architecture and no farming – its population was made up of the descendents of the original newcomers to the spa who were the retired gentry and the professional classes. In the south, in towns like Ystradgynlais the people were working class and proud of it. They built and supported working men’s clubs where they could have rest and relaxation away from the heavy industry of coal and steel.

This local government reorganisation was the outside, modern world bursting in on the stable communities of Powys. Another marker of change was the advent of the EU and the regional development grants available across Europe to areas with lower than average per capita GNP. Under any of the EU’s criteria Powys should have achieved Objective 1 status with all that such status entailed in terms of the higher level intervention rates for grants. But, as I will explore in more detail later, the independent nature of the ‘Mid Walians’ limits effective lobbying and the area “missed out” on Objective 1 status and got “only” Objective 5b status with lower grants regimes on a more restricted range of projects. Objective 1 status was awarded to all the counties on the Welsh borders of Powys. This lack of easy access to large European grants has accentuated the differences between Powys and its neighbours with decline often arrested elsewhere, whereas it has continued in Powys.
Heading a large department in the FE sector I noted the changes in the number and quality of learners coming to college and their changing demands on the system and in the increasing number of youngsters leaving the area for education and work and not returning. Sitting on area committees with responsibilities for addressing issues relating to decline (e.g. Local Futures and Healthy Lifestyles round tables), gave me a considerable insight and hands-on contact with the Powys community and its socio-economic problems and the struggle by agencies to encourage new businesses to the area against the trend. I have watched over time the communities change, from stability to fractiousness and watched as the communities aged and the number of children declined: vibrant communities needed balanced populations and this was another marker of change.

At the same time I felt that there were advantages and benefits to living and working in Mid Wales that were not generally recognised - that there was a richness in rural life that was overshadowed by the headlong rush elsewhere in the UK to join the material world. I came to see, both by observation and by qualification, that the assets of clean air, pure water and a slower pace of life were in fact the raw ingredients of a recipe that was the antidote to twentieth-century living. If we could find an effective and durable methodology to exploit those assets, then we could create a new economic paradigm for Powys that would bring wealth and opportunity and even perhaps return communities to that once enjoyed stability.

So at no stage can I say I was an impassive, indifferent or disinterested observer - for me, postulating a revised economic scenario for Mid Wales that was practical in real and political terms was worthwhile and purposeful which put my objectivity clearly into question and was something I needed to be mindful of throughout the research process. I wanted an outcome which would support the feasibility of the health/spa
industry as a focus for regeneration since I saw it as a real chance for Mid Wales. More, the research was based on a personal belief that a competitive health/spa tourism industry could offer Mid Wales an opportunity for economic prosperity in the face of what appeared to be genuinely-limited alternative opportunities for economic growth. My personal belief was the driver for the research and its political objectives. My argument, supported here by Professor Wheeller, was that my involvement and stake in the outcome does not stop my ability to see the matters clearly and draw objective conclusions.

My experience has led me to the view that the prospects for Mid Wales depend on direct intervention by the public sector to create stable, continuous and prosperous communities. Thus my interest is in policy: how is it made and how does it create the context for positive change in a rural community? This has led to me formulating thoughts about the nature of life and politics in Mid Wales. I am not being controversial when I say that Mid Wales has no political weight either in a pan-Wales or a UK context. There are several reasons for this. First it is isolated, rural and with little mineral or other natural wealth that gives it a cachet in the economic or political world outside its borders. Second, it has a small voting population, which has a tendency to be independent: and returns Liberal or independent candidates to elected bodies. It is for these reasons the region has limited or no influence in the two-party political structure of the UK which relies on its traditional power bases and lobbying mechanisms to influence its choice of policy and strategy for implementation. I think that this is an inherent feature of a border people who have retained their independence of thought and action throughout the turbulent history of cross-border conflict (trans-national of course) over the centuries. They are nobody's poodles, but equally, to maintain the canine analogy, they are no rottweilers either, able to influence or change the course of events or policies that have a direct bearing on their area.
Such independence is a fine attribute in an individual. However, in the UK, which has derived its current politics from collective and joint action in parties that create their influence from their joint action, it is tantamount to the charge of deliberate naivety. By placing their collective heads in the metaphoric sand, the Mid Wales’ communities have yielded up any opportunity to influence the public policies that affect them. As such it would be unreasonable to suppose that Mid Wales could have sufficient influence to alter Wales, UK or EU policy in its favour.

Faced with this real politic, Mid Wales politicians and agencies are reduced to ‘walk on’ and ‘bit parts’ in the theatre of political decision-making and recognise that their actions are a process of pragmatism and optimization - i.e. seeking the best result from the given set of policy structures and incentives available. Thus to achieve betterment in the form of direct financial and other benefits from the government’s table, Mid Wales has to play the game by rules set by others. Rules not designed to give any advantage to Mid Wales.

There is a corollary to this independence of action and thought: My experience and observation, as outlined in my analysis in Chapter seven, suggest that Mid Wales has no collective self-starting skills and therefore needs intervention if it is to have a stable, continuous and prosperous economy. By this I mean that whilst there is evidence that individuals have the drive and ambition to create businesses and prosperity, there is little clear and collective agreement on where public policy should be focused in the future for the collective good. This is unfortunate since democracies, by their nature, tend not to alter their public policies except by incremental amounts. They adjust in the light of both experience and the preferences of the party in power. However, in the UK the differences between parties are often small and subtle. This means that all
agencies have a real chance to influence change if they understand the system and use their opportunities for influence.

Mid Wales has benefited over time from public investment and indeed had its own development agency in the Development Board for Rural Wales to bring new industry to the area. This was established as an acknowledgement of the difficulties facing the area and, over time, despite the structure of the grant regime (both domestic and European), the physical location of Mid Wales and its limited labour pool, there have been successes as well as failures. Often the technique was to introduce business that would not have come to the area except by the nature of the financial and other incentives on offer. As such, many did not stay when the going got tough. In other words, despite looking good at the outset and worth the money for the benefit accrued, the projects were not able to giving any long-term certainty and continuity to the community.

I felt that a more internally-driven solution (i.e. local and regional), exploiting local natural assets in a modern, holistic way that emphasised the Mid Wales "green" credentials could be a better solution. It would be a scheme that had a prospect of longevity based on its own internal consistencies and resources, i.e. to optimize the exploitation of its comparative advantages and to do more of what it does well. Mid Wales could, in my view, be the equal of other areas by being empowered to make the most of its natural advantages and by proper policies, backed by good training with collaborative business ethics, turn it to competitive advantage.

With life expectancy in the UK greatly increased by enhanced medical care, the ill health of the nation is often predicated on more intangible, but equally devastating, conditions. Stress, for example, can be relieved by the adoption of a different
approach to living. The resources of Mid Wales (fresh air, landscape, spa history) can turn this emergent need to its advantage in offering places and activities that relieve stress. The idea sounds good and so in my research I looked for exemplars to see if there were any regions directly analogous to Mid Wales or where knowledge transfer could take place. I found such examples in France and Bath Spa.

10.3.2 THE PRACTITIONER’S TALE

All my experience in training and education has led me to the view that all individual and/or community success – in governance, business or socially – is predicated upon proper training. That is, carefully-devised schemes of training, well taught and delivered through appropriate media, tailored to the needs of economic needs of the region and developed in conjunction with business, will result in a more prosperous and stable society. It gives me a personal mantra - training, training, training. Training must be an integral part of the society and be available to the student, the business and the wider community.

In reality, my experience of the process of change in public policy in FE suggests that this view is not shared at government level. The general practice is that the government announces a new strategy in funding or the curriculum and seeks to implement directly. Over time and experience it adjusts – incremental change overlaid on primary strategy to give continuity and coherence. But the reality is that it is often a stop/start process as it seeks to accommodate the providers and the electorate at the same time or, alternatively, has an accent placed upon it by the particular views of the Minister in power. It is, in a word, disjointed. Strategy is played out in reality not as a smooth process of planning and implementation, but as disjointed incrementalism. It has a tendency to centre on current pre-occupations and issues rather than the
continuity and nurturing of the essential relationships between the learner, the community and the employer. So in my view, success in any plan for economic regeneration must be accompanied by a parallel development in training and education.

If training is key, then it follows that access to that training is critical. In Mid Wales, the opportunities for the indigenous population to get the right training at the right level when they want it is limited. Whilst there is an FE college offering diversity in training and learning, there are no HE establishments in Powys. This has real implications for knowledge creation, exploitation and technology transfer. In my view, proper and real connections between FE and HE are mechanisms for personal and community growth. Both for the student and the community it is a quantum leap from FE to HE. FE today is very much about implementing policy handed down from government whereas HE is all about reflective skills and time to think, i.e. the development of policy. But they are inter-dependent and need to be closely aligned if the region is to reap the long-term rewards and benefits of training that is based in sound policy practically applied.

10.3.3 THE RESEARCHER'S TALE

My role as a researcher was driven by my political objectives for health/spa tourism as a focus for regeneration in Mid Wales based on its former spa industry. I wanted to build on my experience of the European spa industry to incorporate best practice into a blueprint for health/spa tourism in Mid Wales and to explore how such a proposal would resonate with the extant policy agendas to achieve a long-term and prosperous outcome that recognised the local context of political subjectivity and the independent thinking of the people of the region.
At the outset of this work I read the texts about validity, reliability and bias and I was worried about my insider roles being a problem in this regard. As my work progressed and I read more I came to see my insider roles not as a weakness but as a strength of my work. In reflecting on my work in writing this final section I am more convinced of this than ever and of the value of my research.

One viva comment I have reflected on particularly related to the potential biased perspectives of the local authority representatives that I interviewed in relation to the Bath Spa case study. Guba and Lincoln (2008) discuss bias in the context of fairness – deliberate acts of marginalization and exclusion of voices from the research effort. Whilst I feel comfortable that I was able to glean from the interviews what I needed in terms of implementation of a major project through public-private partnership, if I were to undertake the research again I would probably widen the sampling frame to include a wider set of stakeholders. I felt at the time, and still feel, that the problems experienced by the Bath Spa project were outside my sphere of interest as the project had been implemented and the final outcome achieved. However, these problems delayed the opening of the spa and brought the project into sharp public focus. To see how these may have been avoided through the way that contracts were written and ownership of, and access to, the spa resource was negotiated could be useful. If the blueprint and action plan for Mid Wales were to be implemented this is an area of research that I would strongly advocate being followed.

As my research progressed I became more comfortable with not having to locate it firmly within any particular epistemological paradigm. In my MA I took a positivist approach. In this work I did not rush to a decision on this and eventually opted for pragmatism which recognises that values play a significant role in conducting research.
and drawing conclusions and, most importantly, that this is not a problem. As Cherryholmes (1992: 14) asserts:

*Pragmatic research is driven by anticipated consequences. Pragmatic choices about what to research and how to go about it are conditioned by where we want to go in the broadest of senses ... Beginning with what he or she thinks is known and looking to the consequences he or she desires, our pragmatist would pick and choose how and what to research and what to do.*

Ontologically, the pragmatic perspective is that there is an external world independent of our minds and that truth is a normative concept — ‘truth is what works’ (Howe, 1998: 14) and that ‘knowledge claims cannot be abstracted from contingent beliefs, interests, and projects’ (Howe, 1998: 14-15).

So in brief as a researcher I have adopted the advice of Tashakkori and Teddlie (1998: 30), i.e.:

*Study what interests and is of value to you, study it in different ways that you deem appropriate, and use the results in ways that can bring about positive consequences within your value system.*

### 10.4 CONCLUSIONS

The broad and primary conclusion of the work is that the model of health/spa tourism developed in this study shows that collaboration could bring to fruition the creation of regional / national policy to create an acceptable branding and marketing strategy with clear local practical implementation through local joined-up thinking. But that it needs to be supported by an effective and coherent training regime involving both FE and HE since FE can offer HE skills in resource management and leadership, whereas HE offers the tools for learning to think laterally.

The curiosity that I set out with has, at least in part, been satisfied by the research process. I have observed and learnt a great deal not only about the nature of
regeneration and the contribution health tourism can make towards it, but also about
the process of political choice. Whilst I have not been wholly convinced that policy is
made in a rational and logical way being as it is subject to the vagaries of the less than
perfect democratic process, I do now think that communities can determine their future
by choosing between alternatives if properly presented. Events do influence
community led choices, but tautologically, choices made by the community can alter
events and give chosen outcomes.

I suppose, in truth, I was not surprised to find that pragmatism was used by all parties
as a mechanism for navigating through the process of both choice and events. I was
not surprised because it is only with the luxury of time and a research thesis that
anyone is in the position of having perfect knowledge to make decisions. So all
decisions, particularly in a community context, are taken on what is known at the time
and with an informed guess as to the future.

The research did reveal a proposition that is real, workable and which has integrity. It
could be implemented and make considerable contribution to Mid Wales if the right
choices were made. I believe, finally, that choosing to develop health tourism would
not only make sense in a perfect world, but is the right pragmatic response as well.
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APPENDIX 6.1
MILLENNIUM COMMISSION SPA PROJECT - EXPOSITION OF THE SUCCESS CRITERION

BATH SPA MILLENNIUM PROJECT: SUCCESS CRITERIA
The following statements are founded on the agreed Millennium Commission project objectives, amplified by discussions at a Risk Management Workshop comprising the partners to the project and specific consideration and input from the Management Board of the project. Bath Spa Project, Risk Review Workshop 11 December 2000 (2007)

CULTURAL: Bringing Hot Spring bathing back to Bath. (The very reason the City was established): Achieving popular support of Bath and North East Somerset Council (B&NES) residents for the project after 5 years of operation.

ENVIRONMENTAL: Setting a new benchmark for architectural design in the City and maximising use of a natural resource (hot water currently flows to drains).

ECONOMIC: International marketing opportunity for B&NES to maintain its position as a major tourist destination, creating directly and indirectly 290 jobs in local economy. And generating £8.5 m annual revenue flows in the local economy after start up period. Stimulated development in Leisure/Health ‘Personal Well-Being’ market in B&NES. Following public investment in capital costs, the facility becomes a viable commercial business with operational risks transferred to private sector.

SOCIAL:
• To allow subsidised access for B&NES residents to one of the Hot Springs.
• To allow projected surpluses to be used by charitable trust to develop schemes of subsidised access to facility for targeted groups.
• To establish discounted access to residents through subscription scheme.
• To maximise disabled access to the facilities in a way that has never before been achieved.

EDUCATION: to establish Education and Community Programmes relevant to Spa Bathing

COMMUNITY LEADERSHIP:
To demonstrate the local authority can lead through partnership and implement challenging, sensitive and exciting projects where private sector initiatives have successively failed.
## APPENDIX 6.2
BATH SPA MILLENNIUM PROJECT FUNDING (SEPTEMBER 2003)

<table>
<thead>
<tr>
<th>Organization</th>
<th>Amount (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MILLENNIUM COMMISSION</td>
<td>7,778,884</td>
</tr>
<tr>
<td>THERMAE DEVELOPMENT COMPANY</td>
<td>5,610,487</td>
</tr>
<tr>
<td>BATH SPA TRUST</td>
<td>100,000</td>
</tr>
<tr>
<td>ARC QUARRIES</td>
<td>70,000</td>
</tr>
<tr>
<td>RESIDENTS SUB SCHEMES</td>
<td>100,000</td>
</tr>
<tr>
<td>KONVER GRANT</td>
<td>120,000</td>
</tr>
<tr>
<td>RSA</td>
<td>6,460</td>
</tr>
<tr>
<td><strong>SUB-TOTAL, GRANTS, INVESTMENT AND FUND RAISING</strong></td>
<td><strong>13,785,831</strong></td>
</tr>
<tr>
<td>B&amp;NES (VALUE OF BUILDINGS)</td>
<td>1,160,000</td>
</tr>
<tr>
<td>B&amp;NES (CASH)</td>
<td>11,097,169</td>
</tr>
<tr>
<td><strong>TOTAL ESTIMATED COST</strong></td>
<td><strong>26,043,000</strong></td>
</tr>
</tbody>
</table>
APPENDIX 6.3

HEALTH

AMBIENCE OF THE REGION

TOURISM

Nutrition Planning
Lifestyle
Eating For Health

Development of Regional Health Product
Ystradgynlais Health Tourism Industrial Workshops -Sports/ Beauty Therapy Equipment

Leisure Facilities
Health/Fitness/Sport
Aromatherapy
Reflexology
Massage

Health Education
De-tox and Healthy Lifestyle Programmes

Fitness and Leisure
Fitness Testing
Weight Loss Programmes
Thalassotherapy
Beauty Therapy
Remise-en-Forme
Corporate Fitness

Therapy Products
(Harnessing Local Resources)
Mineral Water plants
Mud Bath
Essential Oils
Herbal Remedies

Marketing
Spa and Wellness Trail as in Auvergne

Agricultural Diversification
Agri-Food Agri-Tourism

Facilities
Hotel
Hotels with Leisure
Hotels with Spa
Farm Guest House
Café Tea House
Restaurants
Pubs
Leisure Centres
Holistic Centres
Beauty Treatment Centres
Alternative Therapy Centres
Craft Centres
Golf Clubs
Health Product Shops
Canoeing
Pony Trekking
Fishing

Local Development
Harnessing Local Human and Physical

- Industrial Factories
- Craft Centres
- Therapy Centres

REGIONAL IMAGE

REGIONAL IMAGE PRODUCED BY MARKETING
HEALTHY LIFESTYLE APPEARANCE

REGIONAL IMAGE IS PRODUCED BY HEALTH

Tourism

Print adapted from: Lloyd (1992: Tourism

3
APPENDIX 6.4

QUESTION SCHEDULE USED IN SEMI-STRUCTURED IN DEPTH INTERVIEW WITH KEY STAKEHOLDERS ON TUESDAY 23RD MARCH 2004 14.00 1700hrs ROOM 1 TRIMBRIDGE HOUSE, BATH

Interviewees were the following B&NES Officers:
Rhodri Samuel: Bath Spa Co-ordinator the key person who created the original concept and was client policy manager (whose role was to take the clients side).
Paul Simons: Bath Spa Project Director
Mike Gray: Bath Spa Project Manager

QUESTION SCHEDULE

Why did the council become involved in the Bath Spa Millennium Project? (BSMP)
- How did the council become involved (i.e. what were the mechanisms?)
- Was the project politically led or officer led?
- How did the project evolve?
- Did the council commission consultants?
  If so
  a) Who drew up the brief?
  b) Was the brief approved by council?
  c) Was there any consultation on the brief?

If there was a consultants report
  a) How was it received?
  b) Did the project follow the format suggested by the consultants?
  c) How did the planning application get 'put together'? e) By whom? f) How long did the planning process take?
  g) Did the final approval match the original aspirations?

Did the brief to the consultants require that the project should match the eligibility criteria of any funding mechanism? (i.e. did they skew the brief to match the criteria?)
'Stakeholder' is about ownership and management - i.e. it is not too difficult to get capital funding? But revenue costs? Is the project sustainable? What revenue commitment has the council made?

Why is the new Bath Spa still not open to the public?
At what point did the council realise that there were going to be difficulties within the BSMP?

How were these difficulties resolved?

How could these difficulties be avoided if/when setting up a similar project?

How have the changes in plans with the BSMP affected local business that had an interest in the opening of the BSMP?

What were the main challenges within your (the council's) role in the BSMP?

Has your experience with the BSMP changed any of your ideals of how you work?

What advice would you give to a Spa Town like Llandrindod Wells should they wish to embark on a similar venture? i.e. How far is the project transferable?
## APPENDIX 6.5

### PRINCIPLES OF RISK MANAGEMENT

<table>
<thead>
<tr>
<th>GLOBAL PERSPECTIVE</th>
<th>・ Viewing software development within the context of the larger systems-level definition, design, and development. ・ Recognizing both the potential value of opportunity and the potential impact of adverse effects.</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORWARD-LOOKING VIEW</td>
<td>・ Thinking toward tomorrow, identifying uncertainties, anticipating potential outcomes. ・ Managing project resources and activities while anticipating uncertainties.</td>
</tr>
<tr>
<td>OPEN COMMUNICATION</td>
<td>・ Encouraging free-flowing information at and between all project levels. ・ Enabling formal, informal, and impromptu communication. ・ Using processes that value the individual voice (bringing unique knowledge and insight to identifying and managing risk).</td>
</tr>
<tr>
<td>INTEGRATED MANAGEMENT</td>
<td>・ Making risk management an integral and vital part of project management. ・ Adapting risk management methods and tools to a project's infrastructure and culture.</td>
</tr>
<tr>
<td>CONTINUOUS PROCESS</td>
<td>・ Sustaining constant vigilance. ・ Identifying and managing risks routinely through all phases of the project's life cycle.</td>
</tr>
<tr>
<td>SHARED PRODUCT VISION</td>
<td>・ Mutual product vision based on common purpose, shared ownership, and collective communication. ・ Focusing on results.</td>
</tr>
<tr>
<td>TEAMWORK</td>
<td>・ Working cooperatively to achieve common goal. ・ Pooling talents, skills, and knowledge.</td>
</tr>
</tbody>
</table>
APPENDIX 7.1

Appendix 7.1 The Distribution of pre-Cambrian and lower Palaeozoic rocks and major tectonic lineaments of Wales and the Welsh Borderlands Edmunds, W.M. and Robins, N. 1991)
APPENDIX 7.2

Comparison of chemical compositions of mineral waters at Llandrindod Wells using a Schoeller diagram.

Appendix 7.2 Comparison of compositions of mineral waters at Llandrindod Wells using a Schoeller diagram (Edmunds, W.M. and Robins, N.1991)
APPENDIX 7.3

VOCATIONAL HEALTH TOURISM COURSES COLEG POWYS: LLANDRINDOD WELLS

HOLISTIC THERAPY

- Body Massage
- Reflexology
- Aromatherapy
- Holistic Facial Massage
- Anatomy and Physiology
- First Aid
- Customer Service and Reception Skills
- Heat Treatments (Sauna, Spa Bath, Infra-red Lamp)

BEAUTY THERAPY

- Facial Skin Care
- Application and Profiling Make-up
- Associated Skin Care Treatment
- Make-up for All Occasions
- Eyebrow Shaping and Tinting
- Eyelash Tinting and Application of False Lashes
- Applied Anatomy and Physiology
- Manicure and Pedicure with Hand and Arm and Foot and Leg Massage
- Body and Facial Waxing Treatments
- Commercial Reception Training
- Anatomy and Physiology
- Figure Diagnosis
- Business Organisation
- Electrical Facial Treatments
- Electrical Body Treatments
- Epilation
- Body Massage
- Aromatherapy
- Specialist Make-up
- Artificial Nail Structures
- Sauna Steam Treatments
- Sun Bed Treatments
- European Language
- Hairdressing Level 2
- Anatomy and Physiology
SPORTS THERAPY

- Fitness Testing
- Exercise to Music (instructing in group exercise)
- Circuit Training
- Gym Instruction
- Body Massage
- Heat Treatments
- Nutrition
- Anatomy and Physiology
- Commercial Reception Training
- Key Skills
- Sports Leader Award
- WWTA Weight Training Coach Award
- VTCT Body Massage Certificate
- Specialist NVQ Units
- A variety of other Specialist Awards
- Anatomy and Physiology
- Advanced Health Related Fitness Testing
- Health, Safety and Security in the Workplace
- First Aid
- Body Massage
- Remedial Massage
- Sports Event Massage
- Sports Injuries Application of Thermal and Electrical Modalities
- Post Medical Sports Rehabilitation
- Sports Related Nutrition
- Body Alignment
- Individual Remedial Exercise
- Weight Training Instructor Award
- VTCT Management of Activity Injuries Diploma
- FA Sports Injuries Basic and Intermediate Diplomas
- Information Technology
- Key Skills
- Other Specialist Awards
APPENDIX 7.4

VOCATIONAL HEALTH TOURISM COURSES COLEG POWYS: BRECON

LAND-BASED AGRICULTURAL COURSES

Land-based Agricultural Courses are structured to help farmers diversify and include modules such as:
- Accounts and Farm Business Management
- Agricultural Machinery Service Engineering - NVQ Level 2 (City and Guilds 4024)
- Agricultural Machinery Service Engineering - NVQ Level 3 (City and Guilds 4024)
- Agricultural Mechanics (Open College Network - Level 2)
- Agricultural Service Engineering - NVQ Level 2 (City and Guilds 4024)
- Farm Mechanics (Open College Network - Level 2)
- Farm Vehicle and Machinery Maintenance and Repair (Open College Network - Level 2)
- General Agriculture (Open College Network - Level 2)
- Planning for Change in Agriculture Coping with Farm Administration and Opportunities for Diversification
- Production Agriculture
- Service Engineering (Agricultural Machinery)
- Livestock Husbandry & Management
- Sheep Dips
- Veterinary Medicines
- Chainsaw Maintenance & Usage
- Sheep Shearing
- Pesticides Application
- Telescopic Handlers
- ATV bike
- Horse-keeping
- Computer Training for Farming Families

TOURISM AND CATERING

TOURISM

Computing for the Tourist Industry
Welcome Host (Wales Tourist Board)
Travel & Tourism (to A Level standard)

CATERING

Diploma in Professional Cookery
Certificate in a Professional Cookery
Catering & Hospitality NVQ
Training in the Workplace
Food Hygiene
National Licensee Certificate