

Study on Strategies for Developing Medical Healthcare Wellness Resorts in Korea

국내 메디컬 헬스케어 웰니스 리조트 개발 전략에 대한 연구

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Abstract: (1) Background/Purpose: The COVID-19 pandemic has profoundly reshaped consumer lifestyles and travel patterns, placing health, safety, and privacy at the forefront of tourism decisions. Wellness resorts have emerged as one of the fastest-growing destinations in the post-pandemic era. While the global wellness tourism market is projected to expand from USD 6.3 trillion in 2023 to USD 8.99 trillion by 2028 (GWI, 2024), South Korean wellness resorts remain constrained by regulatory restrictions that limit the integration of medical and wellness services. (2) Methodology: This study employs a mixed-methods approach combining a literature review of post-pandemic consumer behaviour and global wellness trends with in-depth case analyses—domestic (The WE Premium Health Resort, Healiency Sunmaeul, PARK ROCHE Resort) and international (Chiva-Som Health Resort, RAKxa Integrative Wellness Retreat Bangkok Resort)—using SWOT analysis. (3) Findings: Post-pandemic consumers increasingly prefer small-group, private, and health-centred travel experiences. Successful global wellness resorts share three core success factors: personalised healthcare programmes, advanced digital health technology, and sustainable operations. Domestic Korean resorts demonstrate competitive strengths in natural resources and traditional healing, yet face systemic barriers including fragmented medical-tourism legislation, insufficient professional workforce, and a lack of integration with global health insurance networks. (4) Originality/Value: This study proposes a Korean-model medical wellness resort framework that integrates traditional Korean healing, modern medical technology, digital healthcare, and long-stay programmes. Strategic recommendations include legislative reform to allow medical-wellness convergence, establishment of standardised certification, development of AI-assisted personalised health programmes, and global marketing leveraging K-Wellness brand identity.

Keywords: medical wellness resort; wellness tourism; post-COVID-19; Korean wellness industry; healthcare tourism; personalised services; digital health technology

I. Introduction

1.1. Research Background and Objectives

The COVID-19 pandemic has brought dramatic changes to individual lifestyles and consumption patterns. Before the pandemic, travel was primarily perceived as an activity for leisure and enjoyment. However, post-pandemic, a strong tendency emerged to place health, safety, and privacy at the forefront. In particular, as the importance of personal space and cleanliness was emphasised, trends toward small-group or personalised travel became prominent, replacing large-group package tours (Global Wellness Institute, 2021; Chen et al., 2020).

These changes brought structural transformation to the travel industry as a whole, with wellness resorts—health-centred destinations—emerging as one of the fastest-growing sectors after the pandemic. Wellness resorts provide an integrated experience that goes beyond mere accommodation and rest; they promote physical and mental health, alleviate stress, and help consumers pursue long-term well-being. Post-pandemic, wellness

resorts have established themselves as ideal travel destinations for consumers seeking recovery and stability.

The global wellness tourism market is growing rapidly in response to these changes. According to the Global Wellness Institute (GWI, 2024), the global wellness economy market, valued at USD 4.9 trillion in 2019, contracted to USD 4.4 trillion in 2020 due to COVID-19. However, following the post-pandemic surge in health awareness, it expanded to approximately USD 6.3 trillion by 2023 and is projected to grow rapidly to USD 8.99 trillion by 2028, recording a compound annual growth rate (CAGR) of 7.3% from 2023 to 2028 (see Table 1).

Table 1. Global Wellness Economy Market Size and Growth Projections, 2017–2028

Source: GWI (2024); IMF, World Economic Outlook Database, April 2024 Edition.

Year	Market Size (USD Trillion)	CAGR (%)	Notes
2017	\$4.5T	—	Pre-pandemic baseline
2019	\$4.9T	5.3%	Peak pre-COVID
2020	\$4.4T	—	COVID-19 impact
2023	\$6.3T	5.9% (2019–2023)	Post-pandemic recovery
2028 (proj.)	\$8.99T	7.3% (2023–2028)	GWI 2024 projection

Despite these global trends, Korean wellness resorts have not escaped the traditional service model centred on spas and waterparks. Medical-wellness services and healthcare-wellness services are restricted by legal provisions under the Medical Act—for example, health consultations and treatment programmes offered in wellness resorts may constitute violations of the Medical Act—making the convergence of medicine and wellness difficult. Furthermore, the Tourism Promotion Act does not clearly define or classify wellness tourism as a separate industry, which impedes policy support, tax benefits, and industry development funding (Korea International Trade Association, 2024; Health Chosun, 2016).

This study aims to contribute to strengthening the competitiveness of the Korean wellness resort industry by reflecting changes in consumer behaviour and travel trends following the pandemic. Specifically, it analyses domestic and international wellness resort cases, explores the possibilities of the Korean market in comparison with global trends, and proposes a new business model that can meet consumer expectations.

1.2. Significance of the Research

The wellness industry has evolved beyond the scope of simply providing tourism and accommodation services into a multi-dimensional and convergent industry encompassing healthcare, lifestyle, and technology. Korea possesses high-level medical technology, abundant natural resources, and diverse cultural assets, conferring high potential in the wellness resort market. However, these assets are not being effectively utilised, and policy constraints—including regulations on the location of medical acts, undefined legal frameworks for wellness tourism, and insufficient linkages with global insurance systems—are weakening competitiveness in the global market.

Moreover, Korean wellness resorts show limitations in providing customised services and differentiated experiences, largely stemming from uniform programme operations, insufficient personalised services leveraging customer health data, and inadequate integration of traditional healing culture with modern wellness technology. Most Korean wellness resorts rely on basic programmes such as spas, hot springs, and meditation, and rarely offer advanced technology-based healthcare solutions or customised long-stay programmes demanded by the global market. Consequently, they fail to meet the expectations of premium and international clients.

Wellness tourism can contribute not only to economic value creation but also to social and cultural values, and has great potential to become a national growth engine. Therefore, research to diagnose the development potential of the Korean wellness resort industry and to secure strategies for differentiated competitiveness in domestic and international markets is of significant timeliness and importance.

1.3. Research Methods and Scope

This study employs both quantitative and qualitative analyses to analyse changes in wellness tourism demand and consumer behaviour following the pandemic, and to present development directions for the Korean wellness resort industry. The research methodology consists of two main components. First, changes in post-pandemic consumer behaviour and travel trends are examined through a literature review and data analysis. Second, domestic and international wellness resort cases are analysed in depth.

Domestic cases include The WE Premium Health Resort, Healience Sunmaeul, and PARK ROCHE Resort. International cases include Chiva-Som Health Resort and RAKxa Integrative Wellness Retreat Bangkok Resort. Based on these case analyses, development directions and strategic implications for the Korean wellness resort industry are derived.

The research scope is divided into three areas: (1) analysis of post-pandemic consumer behavioural changes and increases in wellness tourism demand; (2) derivation of key success factors through domestic and international wellness resort case studies; and (3) development of a wellness resort model suitable for the Korean market and establishment of implementation strategies.

II. Literature Review and Theoretical Background

2.1. Post-Pandemic Consumer Lifestyle and Behavioural Changes

The COVID-19 pandemic caused significant changes in the lifestyles and behavioural patterns of consumers worldwide, with particularly pronounced effects on the travel and wellness industries (Korean Service Industry Academic Society, 2021).

2.1.1. Increased Preference for Personal Space and Privacy

During the pandemic, social distancing and isolation policies became normalised, greatly increasing the importance of personal space and privacy. Fear of gathering in large spaces and concerns about virus spread led consumers to prefer safe and independent environments (Gössling et al., 2021). Wellness resorts emerged as outstanding destinations for meeting these consumer needs. Private villas, private spa rooms, and exclusive swimming pools became key factors in selecting a wellness resort.

2.1.2. Preference for Small-Group and Independent Travel

The pandemic transformed travel patterns toward small-group focus. Large group tours and package tours declined sharply due to infection risks and impersonalised experiences, while family units, couples, and solo travel emerged as the mainstream (Sigala, 2020). This shift suggests that the purpose of travel is expanding beyond simple sightseeing to psychological stability, healing, and personal reflection.

2.1.3. Changes in Consumer Decision-Making Centred on Cleanliness and Hygiene

Cleanliness and hygiene became one of the most important factors in consumer decision-making after the pandemic. The introduction of contactless check-in services, disinfection of public spaces, and UV sterilisation systems became industry standards. For example, Korea's The WE Premium Health Resort introduced AI-based contactless check-in systems and UV sterilisation equipment, providing a safe environment for customers (Tourism Management, 2021).

2.1.4. Expansion of Well-being and Health-Centred Consumption Patterns

The pandemic led consumers to develop deeper interest in their own health and well-being than before. Activities such as meditation, yoga, and detox programmes that alleviate stress and care for mental health emerged as core elements of wellness tourism. Wellness resorts are developing personalised well-being programmes and providing systematic professional health management services to meet diverse customer needs (Han and Hyun, 2017).

2.2. Global Trends and Growth Background of the Wellness Resort Industry

2.2.1. Development of Wellness Resorts and Market Expansion Factors

Wellness resorts have now established themselves as spaces that provide integrated and systematic travel experiences centred on health and well-being, beyond the category of simple accommodation facilities. According to GWI (2022), wellness tourism is one of the few tourism sectors that recorded steady growth even during the pandemic. Wellness resorts are introducing innovative services including customised well-being programmes, nature-based healing programmes, and digital healthcare solutions to meet the diverse needs of customers (Smith and Puczkó, 2019).

2.2.2. Major Service Trends of Wellness Resorts

Wellness resorts are continuously expanding the scope and quality of their services to meet consumers' diversified needs (GWI, 2022). Medical wellness and healthcare services constitute a core competitiveness element—extending beyond simple healing to emphasise preventive healthcare, including health diagnostics, rehabilitation programmes, and customised treatment programmes. Nature-based services such as forest healing, marine healing, and eco-friendly experiential programmes leverage harmony with nature to support customers' stress relief and mind-body recovery. Digital detox services promoting psychological stability by reducing use of digital devices became increasingly important after the pandemic.

2.2.3. Post-Pandemic Growth of Wellness Resorts

Post-pandemic, consumers placed health and safety as their top life priorities, significantly increasing demand for personalised services and long-stay well-being programmes (World Travel & Tourism Council, 2021). Premium wellness resorts are rapidly expanding their market share by providing increasingly sophisticated and personalised services targeting premium clientele. Thailand's Chiva-Som Health Resort and RAKxa Integrative Wellness Retreat Bangkok Resort have gained international reputation by providing personalised programmes based on health data and are evaluated as innovative models fusing modern technology with traditional healing.

2.3. Current Status and Regulatory Factors of Korea's Wellness Industry

2.3.1. Major Services and Market Structure of Korea's Wellness Industry

Korea's wellness industry has traditionally developed around familiar wellness services such as spas, hot springs, and waterparks. Traditional Korean medicine therapies and programmes utilising natural resources serve as distinctive strengths of Korean wellness resorts (Korea Tourism Organization, 2023). However, as competition in the global wellness market intensifies and consumer expectations rise, there remains a gap in providing high-quality services that meet international standards, largely due to the absence of a standardised service system across the wellness industry.

2.3.2. Major Constraints in the Domestic Market

Several key constraints exist for the domestic wellness industry. The medical act and tourism act are clearly separated, imposing serious constraints on wellness resorts that seek to combine medical services. A shortage of service infrastructure, including insufficient specialist workforce and inadequate facilities and equipment, further limits the provision of high-quality customised services. To advance into the global market, it is urgently necessary to lay a legal foundation that enables medical and wellness service convergence through relaxation and restructuring of legal regulations, while systematically supporting and investing in professional workforce development and premium facility expansion (WHO, 2020).

2.3.3. Improvement Tasks for Strengthening Global Competitiveness

To strengthen competitiveness in the global wellness market, Korea's wellness industry needs a flexible legal framework to promote harmony between the medical act and tourism act, and to support convergence services. Service innovation through digital healthcare technology and data analysis can revolutionise the customer experience. Global marketing strategies must leverage Korea's distinctive strengths—traditional Korean medicine therapies and abundant natural resources—to communicate the unique value of Korean wellness to overseas consumers.

III. Research Methodology

3.1. Research Design and Approach

This study adopts a Mixed Methodology to explore changes in the wellness resort industry after the pandemic and the development potential of the Korean market. The mixed research method combines quantitative and qualitative approaches, offering the advantage of simultaneously pursuing empirically-based results and in-depth understanding. Research design consists of three stages: (1) literature review; (2) case analysis; and (3) integrated analysis and strategy development.

3.1.1. Literature Review

Reports and academic papers published by the Global Wellness Institute (GWI), World Travel & Tourism Council (WTTC), Korea Tourism Organization (KTO), and Ministry of Culture, Sports and Tourism are utilised as primary sources to analyse post-pandemic changes in wellness tourism demand and industry trends.

3.1.2. Case Analysis

Domestic cases: The WE Premium Health Resort, Healience Sunmaeul, and PARK ROCHE Resort are selected to analyse operational strategies, customer targeting, and service quality. International cases: Chiva-Som Health Resort and RAKxa Integrative Wellness Retreat Bangkok Resort are examined to compare innovative services and operational models. SWOT analysis is applied to systematically evaluate strengths, weaknesses, opportunities, and threats for each case.

3.1.3. Integrated Analysis and Strategy Development

Based on the collected data, challenges and opportunities in the domestic wellness resort industry are analysed, and feasible strategies suitable for the Korean market are derived through integration of quantitative and qualitative data.

3.2. Research Hypotheses and Key Research Questions

The following hypotheses guided this study: (H1) Post-pandemic consumers prefer small-group and privacy-centred travel, which leads to increased demand for wellness resorts. (H2) Personalised services in wellness resorts have a positive impact on customer satisfaction and revisit rates. (H3) Diversifying services and operational methods beyond current uniform practices will enable wellness resorts to meet increasingly varied customer needs and open possibilities for new market development. (H4) Korea's wellness resort industry has the potential to strengthen competitiveness in the global market by establishing a clear legal framework harmonising domestic tourism, construction, and medical law.

Key research questions include: What are the primary demands and preferences of consumers in wellness tourism after the pandemic? What implications can success cases of domestic and international wellness resorts provide for the Korean market? What services and strategies are necessary for Korean wellness resorts to secure global competitiveness? What impacts does the development of the wellness resort industry have on Korea's tourism, medical tourism, and local economies?

IV. Analysis of Changes in Demand for Wellness Resorts After COVID-19

4.1. Changes in Consumer Travel and Service Preferences: Small-Group and Private Experience Focus

The COVID-19 pandemic caused significant changes in consumer behaviour patterns and lifestyles, presenting a new paradigm particularly in travel and service preferences. The pandemic established safety and personalisation as the most important elements valued by consumers in travel experiences. Pre-pandemic, large-group tours were commonplace; however, concerns about infection risk and lack of personalised experience led consumers to gradually prefer safer and more private environments (Jung and Choi, 2022; Choi et al., 2020).

4.1.1. Increase in Small-Group Travel and Personalised Services

According to the Korea Tourism Organization (2022) 'Consumer Survey and Analysis of Travel Trends in the Endemic Era' report, 72% of domestic travellers travel in small groups of four or fewer, citing safety perceptions

compared to large-group travel. Healiency Sunmaeul in Hongcheon, Gangwon Province actively developed family experiential activities, independent accommodation options, and small-group exclusive programmes in response to these changes, with the average length of stay increasing from 2.3 days to 3.8 days post-pandemic (Heo, 2021; Lim, 2023).

4.1.2. Expansion and Innovation of Private Services

Private villas, exclusive spa rooms, and individual swimming pools have established themselves as important factors in modern wellness resort selection. Thailand's Chiva-Som resort assigned exclusive treatment rooms to all guests and provided independent experiential wellness programmes after the pandemic, recording an increase in revisit rates of over 50%. Research confirms that personalised services positively influence visitor satisfaction and revisit intention (Choe and Kim, 2021).

4.1.3. Preference for Digital Detox and Nature-Based Experiences

The COVID-19 pandemic led to increased digital device usage, with digital fatigue emerging as a serious social problem. Nature-based experiences are attracting attention as an effective means to alleviate digital fatigue and provide psychological stability. Activities such as forest healing (Shinrin-yoku), nature meditation, and outdoor walks demonstrate physiological effects including reduced heart rate, suppressed cortisol secretion, and enhanced positive emotions (Song et al., 2016). Research in Japan has confirmed that forest stays effectively reduce cortisol secretion and increase psychological stability (Park et al., 2010). Healiency Sunmaeul's internal survey found that over 80% of customers reported 'improved psychological stability' and 85% minimised smartphone use during their stay.

4.2. Wellness Resort Selection Factors and Customer Expected Value

Post-pandemic, consumers expect systematic health management and personalised experiences beyond simple relaxation. Key selection factors include: specialised wellness programmes, rigorous hygiene management, customised services, and sustainability and nature-friendly operations.

4.2.1. Provision of Diverse and Specialised Wellness Programmes

Contemporary consumers prefer specialised programmes supporting health management and mental recovery beyond simple wellness activities. Thailand's RAKxa Integrative Wellness Retreat Bangkok Resort designed personalised exercise, diet, and treatment programmes based on customised health diagnostics, increasing the average length of stay from 3.5 days to 7 days, demonstrating that wellness resorts have evolved into centres for continuous health improvement (Smith et al., 2019).

4.2.2. Importance of Cleanliness and Hygiene Management

The pandemic elevated hygiene and cleanliness to essential criteria in wellness resort selection. Korea's The WE Premium Health Resort introduced AI-based contactless check-in systems and reinforced quarantine protocols, maintaining customer satisfaction above 95% after the pandemic.

4.2.3. Provision of Customised Customer Experiences

Personalised services are a core factor strengthening the competitiveness of wellness resorts. Thailand's Chiva-Som Health Resort provides customised wellness plans according to customers' health status and goals, showing revisit rates exceeding 60% (GWI, 2022; Son et al., 2014). As shown in Table 2 (Venture Beat, 2024), personalised services show positive impacts across diverse indicators including email open rates, website visitors, revisit rates, registration and subscription rates, website dwell time, and advertising CTR.

Table 2. Effectiveness of Personalisation on Key Metrics (Source: Venture Beat, 2024)

Key Metric	0–10% Improvement	>10% Improvement
Email open rate	Moderate	High
Website visitors	Moderate	High

Return visit rate	High	Very High
Registration/sign-up	High	Very High
Website dwell time	Moderate	High
Ad click-through rate (CTR)	Moderate	High
App downloads/installs	Moderate	High

4.2.4. Sustainability and Nature-Friendly Operations

Sustainability is an important selection criterion for modern consumers and acts as a major strategic element in wellness resort operations. PARK ROCHE Resort provides eco-friendly value through wellness diets utilising local agricultural products and energy-saving facilities (Chen et al., 2020).

4.3. Expansion of Medical Wellness and Healthcare Service Demand

Post-pandemic, demand has surged in four main areas: preventive health management and immunity enhancement; convergence of medicine and wellness; growth of long-stay programmes; and adoption of digital health technology (You and Lee, 2021).

Regarding preventive health management, wellness resorts offer customised programmes to enhance immunity and alleviate stress, including detox therapies, medicinal cuisine, and nutritional counselling. Korean WE Hotel combines medicinal cuisine and natural healing programmes to simultaneously provide immunity enhancement and psychological stability (Smith et al., 2019).

Chiva-Som Health Resort cooperates with specialist medical personnel to provide customised diagnostics and treatment based on individual health data, with over 40% of annual visitors coming for these specific medical wellness services.

RAKxa Integrative Wellness Retreat Bangkok Resort designs average stays of 7–10 days to help customers achieve long-term health goals. Digital health technologies—wearable devices, digital health monitoring systems, and virtual consultations—provide new experiences that allow customers to check and manage their health status in real time (Song et al., 2016).

V. Case Analysis

5.1. Domestic Case Analysis

Korean wellness resorts are building differentiated operational models leveraging distinctive natural resources and traditional healing culture, combining regional and cultural characteristics with modern wellness trends (Lee, 2021).

5.1.1. The WE Premium Health Resort

The WE Premium Health Resort is Korea's first medical wellness resort, providing an original operational model integrating medical and wellness services. Based on Jeju's natural resources, it provides premium wellness experiences to domestic and international customers through differentiated service strategies.

Key services include: (1) Convergence of medicine and wellness—providing health diagnostics, immunity enhancement, and stress management programmes in cooperation with specialist medical personnel, including management services for chronic diseases such as hypertension and diabetes; (2) Nature healing—operating nature-based healing programmes such as forest walking trails and volcanic rock spring pools using Jeju's natural resources; (3) Wellness diet—providing customised diets utilising medicinal cuisine and customer health data to support immunity enhancement and concentrated care for health recovery.

The resort provides multilingual support services including English and Chinese to meet diverse needs of domestic and international clients, maintaining an overseas customer ratio above 30% even after the pandemic.

Table 3. The WE Premium Health Resort SWOT Analysis

Strengths (강점) First medical wellness resort in Korea with a distinctive position Health diagnostics and immunity enhancement programmes provided through specialist medical collaboration Utilisation of Jeju natural resources (forest walking trails, volcanic rock spring pools) Medicinal cuisine and customised wellness diet provision International customer attraction through multilingual service support	Weaknesses (약점) High initial operating costs make profitability a challenge Medical service expansion constrained by Medical Act and Tourism Act Insufficient utilisation of digital technology
Opportunities (기회) Increasing demand for medical wellness post-pandemic Rising global trust in Korean medical technology Global marketing potential linked with Hallyu (Korean Wave)	Threats (위협) Intensifying competition with global premium wellness resorts Continued institutional constraints Marketing cost burden to maintain overseas customer ratio

5.1.2. Healienc Sunmaeul

Healienc Sunmaeul is located in the forest of Hongcheon, Gangwon Province, and provides unique wellness experiences combining digital detox and nature healing. It emphasises the importance of a healthy life and operates diverse programmes to support healthy ageing (well-ageing) for modern individuals, targeting comprehensive improvements in dietary habits, exercise habits, mindset, and life rhythm.

Differentiated services include: (1) Digital detox programme—customer smartphone and electronic device use is restricted, providing psychological stability in nature; internal surveys show over 80% of customers significantly reduced digital usage during their stay; (2) Forest healing and meditation programme—forest meditation, yoga, and nature walking programmes scientifically measure stress index reduction effects; (3) Healthy diet—diets based on organic ingredients and local food are designed according to individual health conditions. Some rooms accommodate cancer patients in recovery for long-term stays, providing recovery-supporting programmes and diets.

The proportion of long-stay customers (3 days or more) exceeds 50%, and the resort is evaluated as a model case for domestic wellness resorts combining nature and healing.

Table 4. Healienc Sunmaeul SWOT Analysis

Strengths (강점) Combination of digital detox and nature healing Well-ageing programme targeting the 100-year life era Organic diet and long-stay programme Forest healing and meditation programme utilising Gangwon forest resources	Weaknesses (약점) Insufficient integration with medical wellness Difficulty in attracting international tourists Limitations in digital technology utilisation and programme expansion
Opportunities (기회) Increasing digital detox demand post-pandemic Expanding global interest in nature-based healing services Strengthening position as a pioneer success case in the domestic wellness industry	Threats (위협) Technical superiority of domestic and international competing resorts Difficulty in managing nature environment protection and sustainability Limited operational expansion due to insufficient government support

5.1.3. PARK ROCHE Resort

PARK ROCHE Resort utilises the forest resources of Jeongseon, Gangwon Province, and provides a distinctive resort experience combining art and wellness. Derived from the place name 'Sukam (宿岩)', meaning rest through rocks, it introduces nature-friendly wellness programmes that can be enjoyed in natural settings, representing a good example of reflecting traditional natural healthcare approaches.

Differentiated services include: (1) Convergence of art and wellness—simultaneously stimulating customers' psychological stability and creative inspiration through art exhibitions, creative workshops, and music meditation programmes; (2) Spa and hot spring programme—a spa utilising Jeongseon hot spring water as the main service for physical and mental recovery; (3) Wellness-centred programme—wellness activities such as yoga, meditation, and fitness, along with trekking and ecological experience programmes utilising local resources.

The resort implements environmentally friendly operations using energy-saving facilities and renewable resources, and has built a cooperative framework for using local agricultural products and activating the local economy (Aaron Hurst, 2019; Smith et al., 2019).

Table 5. PARK ROCHE Resort SWOT Analysis

Strengths (강점) Provision of differentiated customer experience through convergence of art and wellness Utilisation of Jeongseon hot spring water and forest resources Operational model for sustainability and local economic revitalisation Utilisation of energy-saving facilities and renewable resources	Weaknesses (약점) High cost structure with high entry barriers due to premium programmes Need for strengthened multilingual services and marketing to attract global customers Portfolio limited to specific customer segments (art and wellness enthusiasts)
Opportunities (기회) Response to art and wellness convergence market trends Potential for development of original programmes using local culture and natural resources Positive customer response to sustainability	Threats (위협) Risk of revenue decline due to decreased customer inflow post-pandemic Expansion of similar programmes by competing resorts Vulnerability to external environment changes due to local economic dependency

5.1.4. Comparative Analysis of Domestic Cases

Table 6. Domestic Case Comparative Analysis

항목	The WE Premium Health Resort	Healience 선마을	PARK ROCHE Resort
위치	제주특별자치도 서귀포시	강원특별자치도 홍천군	강원특별자치도 정선군
운영전략	의료와 웰니스 융합, 전문 의료진 협력, 자연 치유 기반 프로그램	디지털 디톡스와 자연 치유 결합, 웰에이징 프로그램, 유기농 식단 제공	예술과 웰빙 융합, 온천 자원 활용, 지속 가능성 및 지역 경제 활성화
서비스 특징	건강 진단, 면역력 강화, 맞춤형 웰니스 식단	숲 치유, 명상 프로그램, 장기 체류형 고객 맞춤형 프로그램	미술 전시, 음악 명상, 온천 스파, 트레킹 및 생태 체험 프로그램
고객 타겟층	국내외 고소득층 및 만성 질환 관리 고객	디지털 디톡스와 심리적 안정감을 추구하는 국내 고객	창의적 영감과 심리적 안정을 추구하는 국내외 고객

운영 성과	팬데믹 이후에도 해외 고객 비율 30% 유지	장기 체류 고객 비율 50% 이상	지속 가능성 강화, 지역 농산물 활용, 글로벌 시장 높은 평가
차별화 요소	제주 천연 자원 활용, 다국어 지원	강원도 산림 자원 활용, 디지털 디톡스	예술과 웰빙 융합, 정선 온천 자원, 지역 연계

The WE Premium Health Resort maintains global competitiveness by providing premium services through convergence of medicine and wellness, but legal constraints under the Medical Act may act as an obstacle to expansion. Healice Sunmaeul provides distinctive experiences combining digital detox and nature healing with high domestic customer satisfaction, but needs improvement in attracting international customers and utilising technology. PARK ROCHE Resort builds a differentiated brand image through convergence of art and wellness and sustainable operations, while also contributing to local economic revitalisation, but programmes focused on specific customer segments may limit customer diversification. All three resorts collectively present diverse possibilities for healthcare services to converge with wellness resorts in the domestic wellness industry, while personalised service, advanced technology adoption, and regulatory improvement remain common challenges.

5.2. International Case Analysis

International wellness resort success cases provide important implications for the development of Korea's wellness industry. Thailand's Chiva-Som Health Resort and RAKxa Integrative Wellness Retreat Bangkok Resort clearly demonstrate the direction and strategies wellness resorts should pursue. Notably, RAKxa was jointly launched by local residential developer MK Real Estate Development, hotel operator Minor Hotels, and VitalLife Scientific Wellness Center—a subsidiary of Bangkok's renowned Bumrungrad International Hospital—representing an evolution beyond conventional developer-operator wellness resort collaboration to a model incorporating a specialist medical facility's wellness centre (Lee and Jung, 2020).

5.2.1. Chiva-Som Health Resort

Chiva-Som Health Resort is a world-renowned wellness resort in Thailand, providing incomparable experiences by perfectly integrating medical services and wellness activities. It harmoniously combines traditional healing methods with modern healthcare technology.

Service characteristics include: (1) Customised wellness programme provision—specialist medical personnel perform systematic health diagnostics and propose comprehensive plans covering customers' diet, exercise, and mental health management; (2) Operation of yoga, meditation, rehabilitation therapy, and detox programmes—diverse wellness activities to promote customers' overall health improvement, particularly with detox programmes helping eliminate toxins while providing specific guidelines for maintaining a healthy lifestyle; (3) Building an eco-friendly resort image through sustainable operations—implementing environmentally friendly operations through renewable energy facilities, locally sourced food menus, and waste minimisation strategies.

Operational strategies include multilingual services (English, Chinese, etc.) for international customer attraction, focused marketing targeting premium clientele, and establishment of global wellness resort standards as a benchmark for worldwide wellness resorts.

Table 7. Chiva-Som Health Resort SWOT Analysis

Strengths (강점) High customer satisfaction maintained through personalised health diagnostics and wellness programmes Diverse wellness activities including yoga, meditation, rehabilitation therapy Sustainable operations and eco-friendly brand image	Weaknesses (약점) Relatively high usage costs due to premium services Limited access for some customer segments due to geographical accessibility Limited popularisation by focusing on specific health goal customers
Opportunities (기회) Continuous growth of the global wellness tourism	Threats (위협) Possibility of travel restriction measures after

market Increasing customer demand for sustainability and personalised services Potential to establish itself as an Asia-Pacific wellness hub	pandemic Strengthening local economic and environmental regulations
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5.2.2. RAKxa Integrative Wellness Retreat Bangkok Resort

RAKxa is a luxury wellness resort located in Bangkok, Thailand, providing customers with new wellness experiences through an innovative model combining cutting-edge technology with traditional healing methods.

Service characteristics include: (1) Real-time health data collection and analysis using wearable devices—monitoring customers' heart rate, temperature, sleep patterns, and other health-related data, with real-time data feedback further personalising the wellness experience; (2) Convergence of traditional medicine and modern medicine—providing comprehensive programmes combining traditional Thai healing therapies and modern medicine, supporting customers in experiencing diverse health therapies customised to their constitution; (3) Long-stay programme—providing minimum 3-day to approximately 1-week long-stay programmes from the initial booking stage, with basic health check-ups at check-in (Heo, 2021).

The resort's strategy involves an interdisciplinary team of specialist physicians, physical therapists, nutritionists, and psychological counsellors continuously monitoring customer health, providing real-time feedback to help long-stay customers achieve health goals. It develops and provides globally-aligned high-level services through partnerships with international healthcare organisations, including collaboration with international medical insurance providers.

Table 8. RAKxa Integrative Wellness Retreat Bangkok Resort SWOT Analysis

Strengths (강점) Real-time health data analysis using wearables and AI, with personalised programme design Comprehensive service provision combining traditional healing and modern medicine High customer satisfaction and loyalty secured through long-stay programme operations	Weaknesses (약점) Increased initial and operational investment costs due to advanced technology adoption Limited access for general customers focused on luxury clientele International recognition limitations for Thai traditional therapies
Opportunities (기회) Expanding digital healthcare technology development and application possibilities Continuous growth of global premium wellness tourists Increasing demand for customised wellness services	Threats (위협) Tourism demand reduction risk due to pandemic and global economic uncertainty Data security and personal information protection issues related to advanced technology Technology advancement by similar competing resorts

5.2.3. Comparative Analysis of International Cases

Table 9. International Case Comparative Analysis

항목	Chiva-Som Health Resort	RAKxa Integrative Wellness Retreat Bangkok Resort
위치	태국 후아힌	태국 방콕
운영전략	전통치유와 현대의학의 융합 모델; 개인화된 건강 진단 및 맞춤형 웰니스 플랜 제공	첨단 기술과 전통 치유법 결합; 웨어러블 기기와 AI 활용으로 실시간 건강 데이터 분석
서비스 특징	요가, 명상, 디톡스, 재활 치료; 친환경 운영 및 지역 농산물 기반 식단	실시간 건강 모니터링; 전통 치유 요법과 현대 의학의 포괄적 프로그램; 장기

		체류형 웰니스 프로그램
고객 타겟층	맞춤형 건강 관리 및 심리적 웰빙을 추구하는 고급 개인 고객	기술 기반 건강 관리와 전통 치유법을 선호하는 글로벌 럭셔리 고객
운영 성과	높은 고객 재방문을 (60% 이상); 글로벌 웰니스 리조트 벤치마킹 대상	글로벌 럭셔리 고객 충성도 확보; 웰니스와 기술 통합의 성공 사례
차별화 요소	지속 가능한 운영 방식; 전문 의료진과 협력한 맞춤형 프로그램; 글로벌 웰니스 표준 수립	첨단 기술과 전통 치유법 융합; 실시간 데이터 기반 맞춤형 서비스; 장기 체류형 프로그램

Both resorts possess strengths in the global wellness market; Chiva-Som values regional connectivity and provides customised health services based on eco-friendly operations and traditional healing, while RAKxa demonstrates a model that integrates the present and future by combining cutting-edge technology with traditional healing. The key success factors of personalised programmes, advanced technology utilisation, and sustainability emphasis are common elements observed in both resorts.

5.3. Success Factors of Global Luxury Wellness Resorts and Benchmarking for Korea

The success of global luxury wellness resorts rests on three pillars: (1) Personalised programmes based on customer health diagnostic data; (2) Advanced technology utilisation (wearable devices, AI) for real-time monitoring and customised feedback; and (3) Sustainability emphasis through eco-friendly facilities, locally sourced diets, and community cooperation (Aaron Hurst, 2019).

These success factors provide important benchmarking elements for strengthening the competitiveness of Korean wellness resorts. Korean resorts can adopt personalised health services based on customer health diagnostics, IoT-based healthcare technology for real-time monitoring, and eco-friendly operations emphasising sustainability including local agricultural product use and community cooperation (Lee and Kim, 2021; MacKinnon et al., 2018).

VI. Strategic Suggestions

6.1. Challenges and Opportunities in the Domestic Wellness Resort Industry

Following the pandemic, Korea's wellness resort industry is seeking to evolve into a high-value-added model integrating medical services and tourism, but is encountering difficulties in actively innovating due to institutional constraints related to the Medical Act and Tourism Act, insufficient global insurance linkages, and inadequate policy support. Simultaneously, the domestic wellness industry possesses unique assets including high medical technology levels, abundant natural environments, and traditional healing culture, providing potential to differentiate in the global market (Ministry of Culture, Sports and Tourism, 2020).

6.1.1. Legal and Institutional Barriers

The rigidity of the current Medical Act and tourism-related laws is one of the biggest obstacles when Korea's wellness resort industry seeks to combine medical tourism and wellness services. The Medical Act stipulates that medical acts are only possible within medical facilities, imposing constraints on naturally combining medical services in the context of tourism products. Additionally, the Tourism Promotion Act does not clearly define wellness tourism as a separate industry, making institutional arrangements for policy support and industry development insufficient.

Furthermore, overseas medical tourists face difficulty accessing medical insurance benefits when using medical wellness services in Korea, as insufficient linkages with global insurance providers limit access for foreign tourists seeking affordable medical wellness programmes. To address this, the government and private sector should cooperate to consider enacting special legislation permitting medical and tourism convergence, establish wellness resorts as a separate legal category, introduce tax benefits and standardised certification systems, and build a framework for international tourists to receive insurance coverage when using Korean wellness resorts (Korea Tourism Organization, 2022; Heo, 2021; Jung et al., 2015; Kim, 2021).

6.1.2. Market Competitiveness Enhancement and Differentiation Opportunities

Korea's wellness resort industry possesses unique assets—high medical technology, Jeju volcanic rock spring water, Gangwon forest resources, and traditional wellness resources such as Korean medicine therapies and medicinal cuisine—that are useful for creating unique value propositions in the global wellness market. Advanced Korean medical technology enables provision of sophisticated health diagnostics, immunity improvement, rehabilitation, and specialist treatment programmes (Chen et al., 2020). Traditional Korean medicine therapies and medicinal cuisine, if modernised and reinterpreted in a form familiar to global customers, can evolve into distinctive products combining health improvement with cultural experience.

6.2. Proposed Korean Wellness Resort Model

6.2.1. Development of Next-Generation Wellness Services Differentiated from Traditional Spas

In the Korean model, traditional Korean herbal ingredients and modern spa technology can be combined to create more profound and unique experiences. For example, herbal steam therapy or Korean medicine oil massage using medicinal herbs such as ginseng, *Angelica gigas*, *Astragalus*, and liquorice can target blood circulation improvement, fatigue relief, and immunity enhancement effects. A Korean medicine-based tea (茶) therapy lounge enables customers to sip traditional herbal teas and rest, simultaneously achieving traditional cultural experience and health improvement.

Nature-based programme strengthening is also important: Gangwon Province's forest healing programmes proceeding in phytoncide-rich forest environments through meditation, breathing exercises, and light trekking combinations can lower cortisol stress hormone levels and provide psychological stability. Jeju marine resource-based thalassotherapy using mineral-rich seawater and seaweed can contribute to skin regeneration and circulation improvement. Jeonnam Wando County's marine healing centre is already showcasing such services (Lee et al., 2017; Smyth and Scott, 2014; Goodrich and Goodrich, 1987).

Digital detox services can be further specified: dedicated lockers storing smartphones and laptops at entry, with reading lounges, art experience galleries, nature observation activities, and traditional craft workshops enabling customers to enjoy meaningful and immersive experiences without digital devices (Kamp and Kumble, 2020).

6.2.2. Creation of a Wellness Environment Targeting Long-Term Health Improvement and Recovery

Creating a wellness environment targeting long-stay customers is key to forming sustainable business models for domestic wellness resorts (West et al., 2018). Accommodation facilities should move beyond simple rooms to prepare specialised spaces suited to customer health goals: 'Sleep Lab' rooms optimising lighting, temperature, and noise insulation for sleep improvement; 'Skin Care Suite' equipped with ultrasound skin scanners, LED light therapy devices, and Korean medicine pack treatment spaces for skin improvement.

Residential-type accommodation for long-stay customers consists of independent facilities including kitchens, living rooms, and personal exercise spaces, inducing customers to form continuous health management habits. This includes comprehensive programmes: personal nutritionist-mediated diet management, 1–2 weekly physician consultations, stress measurement and psychological counselling sessions, and customised exercise prescriptions—elements already validated as success factors at Chiva-Som and RAKxa.

6.2.3. Medical Wellness and Healthcare Service Strategies Customised for Korean Customers

Korean customers generally have high trust in medical levels and show strong interest in data-based personalised management. AI-based health analysis systems and wearable devices can be actively utilised to introduce customised healthcare services (MacKinnon et al., 2018). For example, customers receive smartwatches or fitness trackers upon arrival, monitoring heart rate, sleep patterns, activity levels, and calorie consumption in real time. Medical personnel provide customised exercise programmes, personalised diet prescriptions, Korean medicine consultations, and stress management coaching based on this data.

For integrated healthcare model construction, a team comprising Korean medicine doctors, Western medicine physicians, nutritionists, exercise physiologists, psychological counsellors, and skincare specialists can be formed to specify health goals based on initial health evaluation results, conduct periodic diagnostics and evaluations to review programme effectiveness, and deploy flexible management strategies. Digital technology

can be used to visualise customer health changes, and mobile apps or online platforms can provide guidance even after customers return to daily life to help maintain healthy lifestyles.

6.3. Business Model Development

6.3.1. Target Customer Segmentation and Targeting Strategy

For wellness resorts to grow long-term, segmenting diverse customer groups and providing services meeting each group's characteristics and needs is essential (Dolnicar, 2002). Middle-income customers in their 30s–50s have high interest in chronic fatigue and stress relief from working life, so 'Stress Relief' packages combining nature healing programmes (forest bathing, marine therapy), Korean medicine spas, and meditation/yoga classes can be proposed. High-income domestic and international customers can pursue differentiated premium medical wellness experiences through sophisticated medical wellness services, advanced health diagnostic equipment, private suite rooms, 1:1 sessions with personal nutritionists and fitness specialists, and VIP concierge services—similar to Spain's SHA Wellness Clinic and the US Canyon Ranch.

Young 20–30s consumers have high digital fatigue and mental health management needs, so 'Mindfulness' packages combining digital detox programmes, art therapy, local cultural experiences, small-group meditation/breathing classes, and sports therapy can be proposed (Kamp and Kumble, 2020; Korea Tourism Organization, 2022). Given this young demographic's active information gathering and sharing through social media, digital marketing strategies using Instagram, TikTok, YouTube, and wellness specialist platforms can be deployed, along with participation in global wellness events such as the Global Wellness Summit and K-Wellness promotional video production.

6.3.2. Creation of Differentiated Wellness Environments

Creating differentiated wellness environments is a strategy that fundamentally strengthens the competitiveness of wellness resorts. From the resort design stage, sustainability can be realised through active utilisation of natural resources (forest, coastal, hot spring water), eco-friendly material construction, renewable energy utilisation, and locally-sourced food-centred menus. Customer participatory programme expansion positions customers as 'co-creators of experience' rather than simple consumers—local traditional craft workshops, local food production site visits, cultural performance viewing, and seasonal festival participation help customers experience the local culture and community life during their wellness stay.

6.3.3. Expansion of Medical Wellness and Healthcare Services

Expansion of medical wellness and healthcare services is a core element for wellness resorts to create differentiated high-value-added products. Utilising AI-based health analysis systems and wearable devices enables the design of personalised health management programmes considering individual genetic analysis, blood test results, and lifestyle data. RAKxa's interdisciplinary team continuously monitors customer health through medical personnel, nutritionists, physical therapists, and psychological counsellors, providing real-time feedback to increase long-stay customer health goal achievement rates.

Preventive healthcare service strengthening can include regular health screenings, stress and immunity analysis, hormone balancing programmes, and skin diagnostic equipment adoption. For example, the US Pritikin Longevity Center operates dietary and exercise programmes targeting cardiovascular health management, weight loss, and diabetes prevention, supporting customers in maintaining health habits through online consultations and app-based feedback even after returning home (West et al., 2018). For national and international customer needs, global healthcare network cooperation—partnering with international medical insurance providers and co-developing programmes with prestigious overseas medical institutions—can secure international-standard expertise and convenience.

6.4. Sustainability Strategy for Korean Wellness Resorts

6.4.1. Initial Capital Investment and Operating Costs

Initial investment items can be broadly categorised as construction costs, equipment costs, and personnel costs, each being an essential prerequisite for providing high-value-added medical wellness services. Construction costs require substantial capital investment to equip state-of-the-art healthcare infrastructure (specialist examination rooms, rehabilitation therapy rooms, Korean medicine clinics), nature healing spaces (healing

forests, marine therapy zones), and premium spa suites—as demonstrated by luxury wellness resorts like Japan's Hoshinoya Karuizawa and Switzerland's Grand Resort Bad Ragaz (Yeung and Johnston, 2019).

Equipment costs involve significant initial costs and future upgrade/maintenance costs for introducing state-of-the-art medical diagnostic equipment (genetic analysers, metabolic rate measurement devices, neural balance examination devices), wearable devices and IoT-based data management systems, AI consultation chatbots, and online booking and customised recommendation systems. Personnel costs cover diverse fields including specialist physicians, exercise specialists, mental health professionals, spa therapists, IT engineers (healthcare data analysts), marketing strategists, and overseas sales specialists—with rising personnel costs inevitable as the target clientele demands higher professionalism and global communication skills.

6.4.2. Feasibility

Break-even point (BEP) analysis requires financial modelling considering initial investment (e.g., KRW 20 billion), annual expected revenue structure, operating costs, and marketing costs. For example, during the initial 3 years, margins can be kept low to build awareness and acquire customers, then from year 4–5 onwards, membership programme introduction, overseas market entry, and expanded revisit customer base can advance the BEP achievement point. Service pricing is set according to medical service scope, spa quality, diet premium level, and degree of personalised programme provision, with premium packages potentially priced at several million KRW per person per night.

6.4.3. Long-Term Profitability and Growth Potential

For long-term profitability, customer loyalty enhancement and revisit rate improvement are essential. Membership programmes are one effective means—providing added value to annual-fee-paying members such as priority reservations, customised healthcare plans, seasonal special treatment discounts, exclusive lounge access, and overseas partner resort mutual discount use, maximising customer lifetime value and maintaining stable revenue flows.

Overseas market entry provides additional growth drivers. The Korean Wave (K-Wellness) branding, increasing overseas interest in Korean medicine therapies, and rising trust in Korean medical technology create a favourable environment for attracting global high-income medical wellness tourists. Strategic overseas marketing considering currency fluctuation risks, cultural differences, and overseas insurance system linkage issues, multilingual-support websites, and partnerships with overseas medical institutions and insurance providers can increase overseas customer share, long-term developing into a global wellness hub.

Expanding the proportion of long-stay customers is another key strategy for creating stable long-term revenues. Long-term programme introductions (over 2-week stays), seasonal themed programmes (immunity enhancement season, intensive detox season, traditional Korean medicine gourmet experience season), and lifestyle coaching (sleep improvement, weight management, stress relief) allow customers to experience sustainable changes in health improvement, habit formation, and mental recovery beyond simple short-term vacations. This leads to increased customer satisfaction, positive word-of-mouth promotion, and strengthened revisit intention, ultimately forming a virtuous cycle that secures revenue stability and scalability.

VII. Conclusions and Implications

7.1. Summary and Conclusions

This study re-examined the structural changes the wellness resort industry faces after COVID-19 and analysed future development directions from multiple perspectives. The pandemic fundamentally overturned the behavioural patterns and value systems of tourism consumers, including protection of personal spaces, emphasis on hygiene and cleanliness, and increased demand for preventive health management.

First, post-pandemic consumers prefer small-group and private travel experiences over large-scale group tourism, requiring wellness resorts to provide personalised value through customised programmes. Domestic cases such as The WE Premium Health Resort, Healiency Sunmaeul, and PARK ROCHE Resort have introduced AI-based contactless check-in, private spa rooms, forest healing programmes, Korean medicine detox courses, and digital detox workshops, showing positive results including increased customer satisfaction, stay duration, and revisit intention.

Second, cleanliness and hygiene have become essential prerequisites for wellness resort selection after the pandemic, while customised services and sustainable operations have emerged as key strategic elements. Korean medicine spas, nature healing (forest bathing, marine therapy), 1:1 fitness sessions with specialist trainers, medicinal cuisine-based diet management, psychological counselling, and meditation programmes can increase customer satisfaction and loyalty.

Third, increasing interest in medical wellness and healthcare services acts as a new growth engine for the wellness resort industry. Digital healthcare technology (genetic analysis, wearable devices, AI health analysis, online consultation platforms) combined with traditional healing (Korean medicine treatment, medicinal cuisine, hot spring therapy) is essential for providing differentiated services that help wellness resorts develop from short-term resting spaces into long-term health improvement platforms.

Fourth, Korea's wellness resort industry has potential for differentiation in the global market based on unique strengths including Korean medicine therapies, medical technology, and abundant natural resources. However, institutional limitations—misalignment between medical and tourism laws, insufficient medical insurance linkages, and lack of globally standardised certification systems—constrain industry growth. Benchmarking global advanced cases (Chiva-Som, Switzerland's Grand Resort Bad Ragaz, etc.), establishing special legislation for medical-tourism convergence, strengthening multilingual support services, and cooperating with overseas medical insurance providers will enable Korean wellness resorts to secure distinctive positions in the global market with a next-generation wellness model combining Korean medicine resources and modern technology.

In conclusion, post-COVID-19, the wellness resort industry can achieve long-term growth and competitiveness through preventive health management, personalised programmes, sustainable operations, medical wellness services, and institutional improvements. Ultimately, these efforts will contribute to the wellness resort establishing itself as a sustainable business model that stands out in the global wellness tourism market while contributing to customer quality of life improvement and local economic revitalisation.

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