

Research Article

Designing customer relationship management strategies across the customer journey for wellness retreat businesses

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Abstract: This article aims to synthesize and propose Customer Relationship Management (CRM) strategies for the Wellness Retreat business in the digital era, focusing on evolving consumer behaviors that seek holistic wellness experiences and sustainable tourism. The content applies the Customer Journey Mapping (CJM) framework integrated with the 5A's marketing model (Aware, Appeal, Ask, Act, Advocate) to analyze service touchpoints and opportunities for creating emotional value. The study suggests that the success of wellness retreats depends on the integration of green innovation and slow tourism principles with digital enablers, enabling services to evolve into "transformative experiences." Consequently, this article proposes the PATH Strategic Model (Personalization, Authentic & Green, Touchpoints, High-Value Retention) as a guideline for entrepreneurs. This model emphasizes designing personalized services, creating seamless experiences, and transforming customers into lifelong health partners and brand advocates, which serves as a fundamental basis for sustainable competitive advantage in the health tourism industry.

Keywords: Wellness retreat business; Customer journey; Customer relationship management CRM

1. Introduction

In the post-COVID-19 era, service industries worldwide have experienced significant changes in consumer behavior, particularly a growing emphasis on physical and mental well-being. This shift has been driven by the health crisis, prolonged stress, and emotional burnout resulting from the pandemic [1]. Recent reports indicate that the global wellness economy exceeds USD 6.3 trillion in value and is projected to grow at an average annual rate of 8–10% during the period from 2023 to 2030 [1].

Within this context, the wellness retreat business has emerged as one of the rapidly expanding service industries, as it integrates leisure, health care, and holistic healing into a single service offering. Contemporary consumers increasingly perceive wellness travel as an "investment in oneself" rather than a form of short-term leisure, leading to a rising demand for meaningful and personalized experiences (Passos et al., 2022).[2].

In Thailand, the concept of Customer Journey Mapping has been applied to explain consumer behavior in service industries. A study by (Passos et al., 2022).[3]. revealed that Thai tourists' decision-making journeys during the New Normal period can be classified into six stages: awareness, evaluation, purchase, usage, re-purchase, and advocacy. This framework can be systematically applied to analyze customer journeys within the wellness retreat business context.

However, heightened customer expectations in the digital era have increased the complexity of customer journeys, as consumers are able to access information, compare prices, and evaluate service quality across multiple channels in real time [4]. In this context, contemporary Customer Relationship Management (CRM) extends beyond customer data storage to the use of customer intelligence in connecting all touchpoints along the customer journey and delivering personalized experiences [5]. Empirical research in Thailand's tourism industry further indicates that digital CRM technologies have a positive impact on organizational performance, with marketing planning and implementation capabilities serving as key mediating factors [6].

Accordingly, this article aims to develop a Customer Relationship Management (CRM) strategic framework aligned with Customer Journey Mapping for wellness retreat businesses in Thailand. By integrating concepts and theories from both international and national research, this study proposes a practical model that can be effectively applied in real-world business settings.

2. Related Theories and Literature

2.1 Concepts and Theories Related to the Wellness Retreat Business

The wellness retreat business is one of the fastest-growing service industries in the post-COVID-19 era, driven by a global shift toward greater emphasis on physical and mental well-being. According to the [1], the global wellness economy was valued at over USD 6.3 trillion in 2023 and is projected to grow at an average annual rate of 8–10% through 2030. Meanwhile, the wellness tourism market reached an estimated value of USD 995.3 billion in 2024 and is expected to expand at an average annual growth rate of 13.2% [7].

These trends indicate that wellness retreats are no longer perceived merely as leisure destinations but as long-term investments in health that integrate physical, mental, and emotional care through holistic healing approaches [2]. Research by [8] further demonstrates that wellness tourists prioritize health restoration and long-term quality of life enhancement, with service quality and memorable experiences identified as key determinants of customer satisfaction.

In the Thai context, the concept of Digital Wellness Tourism has gained increasing attention. Kragianni et. al. [9] suggests that the integration of digital technologies, such as health-tracking applications and wearable devices, can enhance customer experiences and expand market reach among younger consumer segments. Moreover, experience design that integrates technology with natural environments contributes to the creation of deep well-being that effectively addresses the needs of contemporary consumers.

2.2 Concepts and Theories of Customer Journey Mapping

Customer Journey Mapping refers to the process of understanding all interactions between customers and a brand or service across multiple channels and time periods [4]. It involves the visual mapping of customer journeys to analyze behaviors, emotions, and needs at each touchpoint [2].

In the context of the wellness retreat business, the customer journey can be classified into five key stages: awareness, consideration, decision, experience, and post-service. These stages encompass the entire service lifecycle, from pre-stay communication to post-stay follow-up and long-term relationship building. This framework enables businesses to design experiences that reduce the gap between customer expectations and actual experiences, while transforming the post-service stage into the starting point of renewed relationships that foster long-term customer loyalty [2,4].

2.3 Relationship Marketing and Customer Relationship Management

Relationship marketing emphasizes the development and maintenance of long-term relationships between organizations and customers by focusing on value exchange and the creation of experiences that exceed expectations [10]. Empirical studies in service industries indicate that Customer Relationship Management (CRM) plays a critical role in enhancing service quality, customer satisfaction, and customer loyalty [11].

Within the wellness retreat sector, relationship marketing can be implemented through post-service follow-up systems, the use of digital technologies to deliver personalized services, and the development of online customer communities that encourage repeat usage and positive word-of-mouth communication.

2.4 Service Design and Service System Transformation

Service design refers to the process of designing customer-centered experiences while integrating the roles and activities of all stakeholders within a service system [12]. In parallel, service system transformation focuses on changes in service processes, technologies, and human resources across both front-stage and back-stage operations [13].

Applying these concepts to the wellness retreat business enables the creation of holistic service experiences that span pre-service, in-service, and post-service stages. The integration of technologies such as artificial intelligence (AI), the Internet of Things (IoT), and data analytics enhances service efficiency and contributes to higher levels of customer satisfaction over the long term such as artificial intelligence (AI), the Internet of Things (IoT), and data analytics enhances service efficiency and contributes to higher levels of customer satisfaction over the long term.

The review of related theories and literature suggests that the wellness retreat business requires an integrated approach that combines customer journey mapping, relationship marketing, and service system design. These frameworks collectively support a deeper understanding of customer behaviors, expectations, and emotions across all stages of service delivery. As such, they provide a critical foundation for developing CRM strategies aligned with customer journeys, ultimately contributing to the long-term sustainability of wellness retreat businesses.

3. Related Models

3.1 The Wellness Retreat Business Model in Thailand

In the Thai context, the wellness retreat business model must take into account country-specific factors, including natural resources, local culture, tourism support policies, and consumer behavior. Thai hotels and resorts transitioning toward wellness-oriented businesses need to expand their service offerings to include wellness-related activities such as yoga, nature-based spa treatments, and experiential activities beyond the guest room in order to enhance the overall value of the stay.

Similarly, [14], whose study is indexed in the Thai Journal Citation Index (TCI) Tier 1 database, argue that wellness tourism in Thailand should be grounded in the philosophy of sufficiency living and designed through the integration of “Dharma, Nature, and Culture.” This approach helps create differentiation and sustainability, particularly for older adults and individuals seeking health recovery and restoration.

Based on the synthesis of relevant studies, five key components of the wellness retreat business model in Thailand can be identified:

1. Leveraging natural resources and Thai cultural assets as core strengths in the design of facilities and ambient environments.
2. Developing holistic wellness programs that address physical, mental, and spiritual well-being.
3. Defining specific target segments, such as older adults, working professionals experiencing stress, and premium or luxury wellness consumers.
4. Designing seamless customer channels and touchpoints across pre-service, in-service, and post-service stages.
5. Fostering long-term customer relationships by positioning wellness services as long-term health investments rather than short-term leisure activities.

Therefore, the wellness retreat business model in Thailand should evolve beyond that of a conventional resort toward an integrated wellness service system that emphasizes personalized experiences and long-term relationships, thereby enhancing sustainable competitive advantage.

3.2 The 5A's Model

The 5A's model is a conceptual framework for understanding the consumer path in the digital era, developed by Kotler, [15] to reflect consumer behavior in highly connected societies. The model consists of five stages. *Aware* refers to the awareness stage, in which consumers first become aware of the existence of a brand or service through advertising, social media, prior experiences, or word-of-mouth. This stage represents the starting point of the customer journey. *Appeal* refers to the attraction stage, where consumers begin to develop interest or preference for a brand based on its image, value proposition, and differentiation. Brands that successfully create positive impressions are more likely to be included in consumers' consideration sets.

Ask represents the information-seeking and inquiry stage, during which consumers search for additional information to verify credibility, such as reading online reviews, seeking recommendations from others, exploring digital platforms, or directly contacting service providers. This stage highlights the critical role of social interaction and digital word-of-mouth in the contemporary consumer decision-making process. *Act* refers to the decision-making and usage stage, in which consumers decide to purchase or use the service and evaluate their actual experience. This stage is particularly important, as consumers assess service quality, satisfaction, and the extent to which the experience aligns with their expectations. Finally, *Advocate* represents the advocacy stage, which is the ultimate objective of the 5A's model. When consumers develop satisfaction and emotional attachment to a brand, they are more likely to engage in repeat usage and positive word-of-mouth, thereby acting as brand advocates.

From an academic perspective, the 5A's model has been widely recognized as an appropriate framework for analyzing the customer journey in the digital era, as it emphasizes cross-channel infor-

mation search, social proof, and positive word-of-mouth, which are key characteristics of modern consumer behavior [16,17] further suggest that the model can be effectively applied to service businesses and wellness tourism, where consumers often rely heavily on reviews and real user experiences prior to making purchase decisions.

In the context of wellness retreat businesses, the 5A's model provides a systematic explanation of the customer journey, ranging from online awareness and attraction through differentiated wellness programs, to information search and evaluation of health outcomes, decision-making and participation in programs, and ultimately the sharing of positive experiences via social media. Such advocacy plays a critical role in driving growth in the contemporary wellness market.

4. Context of the Wellness Retreat Business

4.1 Service Characteristics and Distinctions from Conventional Health Businesses

Wellness retreat businesses are characterized by their emphasis on holistic well-being restoration, encompassing physical, mental, emotional, and lifestyle dimensions. This approach differs from conventional health businesses, which primarily focus on medical treatment and disease prevention. Wellness retreats prioritize the design of immersive experiences within environments that support relaxation, self-reflection, and the development of sustainable health behaviors.

A key distinguishing feature of wellness retreats is the provision of personalized experiences, which are designed based on individual health behaviors and specific needs. Such personalization may include tailored nutrition plans, customized rest and recovery programs, and mindfulness or meditation practices. In addition, wellness retreats often integrate digital well-being concepts, such as reducing technology usage, to enhance emotional recovery and cognitive focus.

Furthermore, wellness retreat businesses emphasize holistic therapeutic approaches, including nutritional therapy, anti-aging sciences, complementary and alternative medicine, and spiritual activities. These approaches support behavioral transformation and the integration of well-being practices into daily life, thereby fostering long-term health outcomes [18, 19 & 20].

4.2 User Behavior and Factors Influencing Retreat Selection

Users of wellness retreat services are primarily driven by intrinsic motivations, such as accumulated stress, the need for health restoration, and the pursuit of life balance, rather than leisure-oriented tourism. Research indicates that individuals experiencing emotional exhaustion or lifestyle-related health risks tend to prefer highly personalized wellness programs [21].

Key factors influencing decision-making include trust in program quality and professional expertise, the image and reputation of the retreat, tranquility, privacy, and connection with nature. These factors significantly affect both customer satisfaction and the intention to revisit [22-24]. This reflects the perception of wellness retreats as experiential health investments rather than conventional health services.

4.3 Conceptual Framework for Customer Relationship Management in Wellness Retreat

Customer relationship management in wellness retreat businesses must account for the unique characteristics of health-related services, which rely heavily on trust, long-term follow-up, and responsiveness to individual needs. Studies suggest that integrating customer data, service processes, and digital technologies is a critical factor in building sustainable relationships and enhancing service value [24].

Moreover, customer segmentation and targeted communication—particularly for older adults—play a significant role in fostering trust and continuity of service usage [25]. Accordingly, an appropriate CRM framework for wellness retreat businesses in Thailand should encompass customer segmentation and personalization, the use of customer intelligence, comprehensive touchpoint management throughout the service journey, long-term value and loyalty building, and digital technology enablement to support continuous and seamless experiences.

In summary, wellness retreat businesses should view customer relationship management as a long-term relationship design process that integrates experience, well-being, and technology. This approach enables wellness retreats to evolve beyond being mere places of relaxation into sustainable health partners for their customers.

5. Customer Journey Analysis

5.1 Defining Customer Personas

The development of customer personas is a crucial step in customer journey analysis, as it enables practitioners to understand customers' motivations, needs, and behaviors through clearly defined representative profiles of target segments [26]. In the context of wellness retreat businesses, persona development is typically based on lifestyle factors, stress levels, health-related needs, and patterns of experiential service consumption. These may include corporate employees experiencing emotional burnout, individuals seeking behavioral change toward healthier lifestyles, or customers who value nature-based experiences and personal development. Systematic identification of personas allows service design and experience creation to align more closely with the underlying needs and expectations of each customer segment.

5.2 Identification of Service Touchpoints

Service touchpoints refer to moments or points of interaction between customers and the organization, both online and offline, that influence experience perception and service quality evaluation at each stage of the customer journey [4]. In wellness retreat businesses, touchpoints encompass a wide range of interactions, including digital information search, communication and booking processes, arrival and check-in experiences, participation in wellness and recovery programs, and post-program follow-up activities. Identifying and managing these touchpoints in a systematic manner enables service providers to design experiences that meet customer expectations and effectively reduce gaps between perceived value and actual experience delivery [27].

5.3 Pain Points and Customer Expectations

Pain points refer to obstacles or negative experiences encountered by customers during service consumption, which may lead to dissatisfaction and diminish the overall value of the experience [28]. In wellness retreat businesses, common pain points may arise at various stages of the customer journey, such as unclear program information, complex booking procedures, delayed communication, ambiguous pricing, or services that do not align with individual needs. At the same time, customers expect seamless experiences, transparent communication, and wellness programs that effectively address their personal health goals.

Before service consumption, customers expect comprehensive and easily understandable information; during the stay, they anticipate attentive care and an environment conducive to recovery; and after service completion, they expect ongoing follow-up and guidance. Failure to meet these expectations may negatively affect customer satisfaction and reduce the likelihood of repeat usage [4].

6. Customer Relationship Management Strategy Design Across the Customer Journey

The design of customer relationship management (CRM) strategies across the customer journey is a process aimed at creating customer value at every point of interaction, from the awareness stage to the development of customer loyalty. The primary objectives are to enhance customer satisfaction, service efficiency, and long-term relationships between organizations and customers [29,30]. This approach begins with understanding differences among customer segments through behavioral data and customer insights, enabling experience design and communication strategies to effectively address individual needs and preferences.

Customer journey analysis serves as a critical foundation for CRM strategy design, as it allows organizations to visualize the entire process, including awareness, consideration, decision-making, service consumption, and post-service follow-up. Moreover, it helps identify areas requiring improvement in order to deliver seamless experiences that align with customer expectations [4]. As a result, CRM extends beyond traditional marketing communication to encompass holistic experience management.

Technology plays a vital role in supporting CRM strategies, particularly through customer data analytics systems and marketing automation tools. These technologies facilitate personalized communication, continuous follow-up, and the timely delivery of programs or services that match customer needs [30]. Beyond improving operational efficiency, such technological integration contributes to building long-term customer engagement and trust.

In the post-service stage, CRM strategies emphasize relationship retention through health outcome monitoring, additional advisory services, and loyalty programs. These practices have been shown

to significantly enhance customer retention and loyalty [31], reflecting a strategic focus on sustainable customer outcomes rather than short-term transactional gains.

Furthermore, effective CRM strategy design should align with the concept of value co-creation by encouraging customer participation in experience design processes, such as program selection, outcome feedback, and service improvement suggestions. This participatory approach strengthens trust and customer engagement over the long term, thereby reinforcing sustainable relationship development.

7. Conclusion

The development of customer relationship management strategies in the wellness retreat industry requires a deep understanding of the customer experience journey through the 5A's model proposed by [15]. This framework provides a systematic approach for transforming customer awareness into brand advocacy along the customer path.

However, the successful application of the 5A's model within the context of wellness retreat businesses does not rely solely on marketing strategies. Instead, it requires the integration of green innovation and digital technologies. In the attraction stage, storytelling that reflects sustainability values and the principles of slow tourism plays a critical role in engaging environmentally conscious consumers. During the service delivery stage, the application of service system transformation concepts—through the integration of AI and data analytics with nature-based therapies helps elevate service offerings into “transformational experiences” that generate tangible and measurable health outcomes.

Ultimately, the core of building a strong base of brand advocates lies in managing customer relationships as a long-term relationship ecosystem that extends beyond the check-out point. Continuous health monitoring, follow-up services, and personalized care transform wellness retreats from mere accommodation providers into “lifelong health partners.” This approach represents the true foundation of sustainable competitiveness for Thailand's wellness tourism industry in the global arena.



Figure 1. The “PATH” Strategic Model

Based on the study and synthesis of customer experience management (Customer Journey Mapping: CJM), integrated with the dynamics of digital marketing (Marketing 4.0) and the context of wellness tourism, this study proposes the “PATH Strategic Model” as a practical strategic framework for wellness retreat operators to enhance sustainable competitive advantage. The model consists of the following key components:

P - Personalization The application of information technology and CRM databases to design precise and personalized wellness programs that effectively respond to individual needs, thereby creating experiences that exceed customer expectations.

A - Authentic & Green The development of a strong brand identity through the integration of slow tourism principles and green innovation, aiming to attract target customers who place high value on sustainability and environmental responsibility.

T - Touchpoints Optimization The systematic management of customer touchpoints throughout the customer journey to ensure seamless and consistent experiences, reducing decision-making barriers and strengthening customer trust at every stage.

H - High-Value Retention A strategic focus on retaining high-value customers through continuous post-service care, transforming service users into long-term “health partners” and brand advocates.

Therefore, adopting the PATH Strategic Model not only enables wellness retreat businesses to adapt effectively to changes in the digital era, but also establishes a solid foundation for delivering health value while preserving the environment and cultural identity. This integrated approach represents the core of sustainable success in the future wellness tourism industry.

8. Patents

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