

Health & wellness tourism



What could it mean for coastal resorts?

Globally, the health and wellness market is worth an eye-popping **\$494 billion (£314.8 billion)**. And it's growing rapidly. However relatively little is known about the size and scope of the market in the UK, particularly in a coastal context.

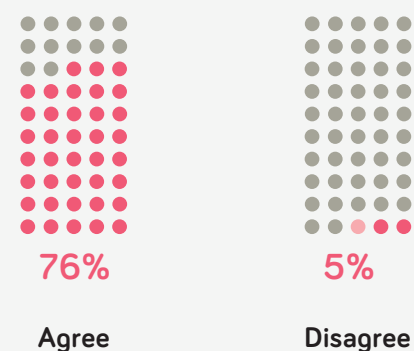
We commissioned new research, surveying a nationally representative sample of over 2,000 people to discover the value of this market, and its potential as a growth opportunity, to coastal destinations.

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What is wellness tourism?

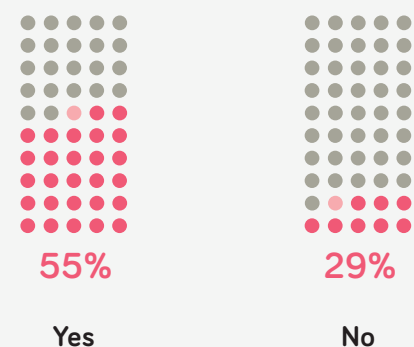
All holidays should enhance your well-being



It's an ambiguous term, but put simply, wellness is about feeling better. So contrary to popular perception, it could be the most inclusive of all tourism market sectors - everyone wants to feel better, no matter how big their wallet. Definitions vary even within the sector, and many would argue that if the purpose of a holiday or break is to enhance wellbeing, in other words, to make you feel better, then surely all holidays are wellness holidays.

However, motivation is key to understanding wellness tourism. Primary wellness tourists are those for whom 'wellbeing' is the sole purpose or primary motivating factor for the trip and destination choice. Secondary wellness tourists are those who seek to maintain a healthy lifestyle while taking any type of trip.

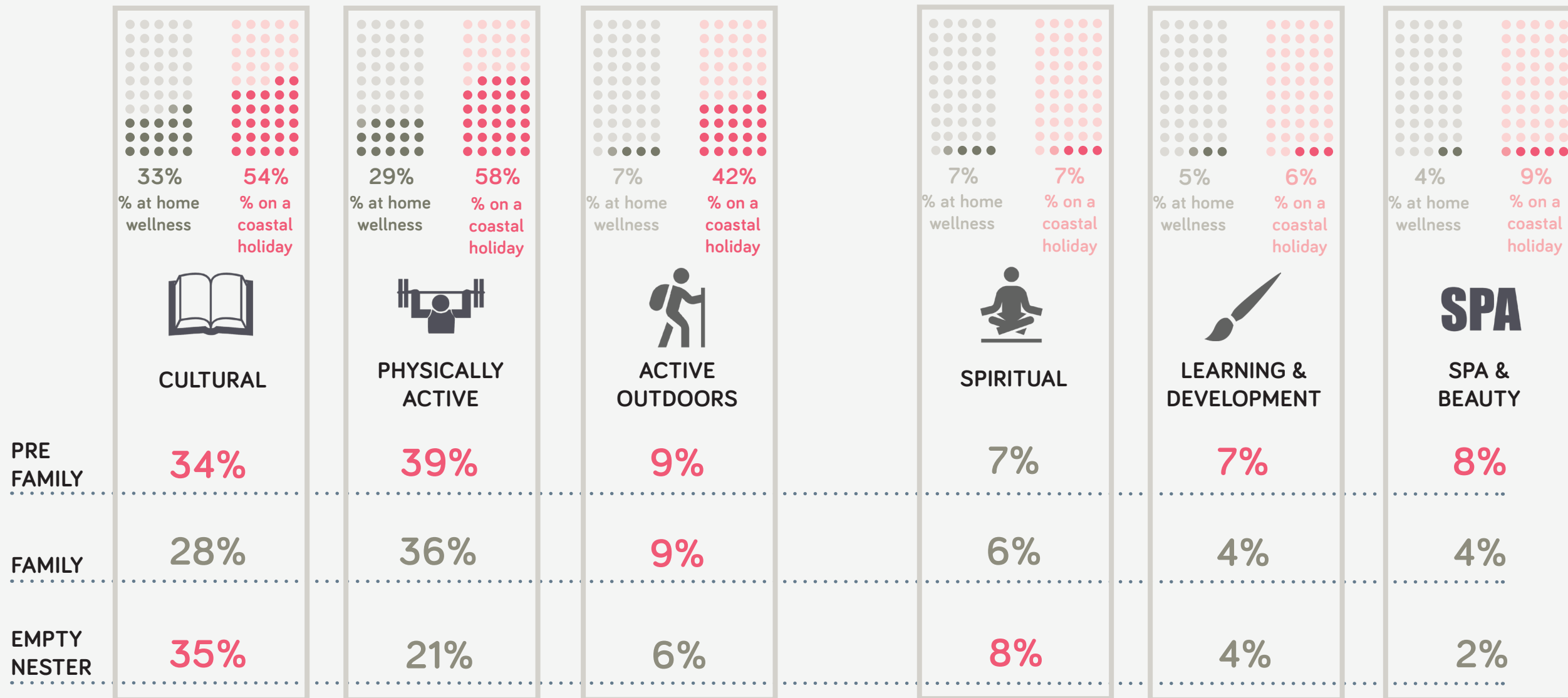
Are all holidays wellness holidays?



So the chances are, you may be a secondary wellness tourist and not know it, whereas a primary wellness tourist is motivated by proactively enhancing a healthy lifestyle, and this will dictate their destination choice.

Where the primary motivation is to enhance wellbeing, wellness holidays could therefore be categorised as health and fitness, healthy eating, spa & beauty, mind-body, spiritual, personal growth, eco and adventure and even art and culture.

The 6 Pillars of Wellness, showing the overall percentage of people engaging in different wellness activities in their everyday lives, by life stage, and the overall percentage engaging in the same activities on a coastal break or holiday



WHAT ARE WELLNESS ACTIVITIES?

While the perception persists that wellness tourism just means spa breaks, it involves a far broader range of activities. Our research suggests that this range can be categorised as ‘cultural’, ‘physical’, ‘active outdoors’, ‘spiritual’, ‘learning and development’ and ‘spa and beauty’, and that people who are actively engaged in these activity types at home are more likely to look for these activities on a break or holiday. At home, more of us engage in ‘cultural’ and ‘physical activities’ than other activity types, with **1 in 3** of us visiting at least two of either museums, galleries, stately homes, the theatre or the opera at least a few times a year. People who regularly play outdoor sports, visit the gym, go swimming, hiking or cycling are considered ‘physically active’.

Although fewer of us are engaged in ‘active outdoors’, ‘spiritual’, ‘learning and development’ and ‘spa and beauty’ activities in our everyday lives, there is evidence of an ‘active wellness niche’ market in the young, affluent, pre-family audience, particularly in the affluent London pre-family audience, for whom wellness is a lifestyle choice. Active in all six pillars, this audience are significantly more likely to be primary wellness tourists looking to maintain a wellness lifestyle on a break or holiday.

‘Active outdoor’ activities unsurprisingly become significantly more popular on a coastal holiday in all life stages, with **1 in 2** engaging. As well as the broader based cultural and physical activities, a coastal break or holiday makes people overall **35%** more likely to be more active outdoors – particularly pre-nesters and families.

The ‘6 Pillars of Wellness’ (above) illustrates the breadth of the wellness opportunity in the UK. To think of this opportunity purely in spa terms is to limit growth potential considerably. Wellness involves a broad spectrum of activities and, particularly for secondary wellness tourists, a large potential market size.

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HOW BIG IS THE WELLNESS MARKET?

Globally, wellness tourism is one of the fastest growing market segments, rising **12.5%** from 2012-2013 -significantly outpacing original growth forecasts of **9%** and worth an estimated **\$494billion (£314.8 billion)** in revenues*. In the UK, **1 in 5** people take at least one dedicated wellness break a year, with significant increases in the younger demographic (nearly a third of all **18-34** year olds), and those living in London (**1 in 4**).

However, with only an estimated **8%** of these wellness breaks currently taken in coastal destinations (albeit representing over **1 million** staying trips per year), there is significant opportunity for growth in coastal wellness breaks and holidays.

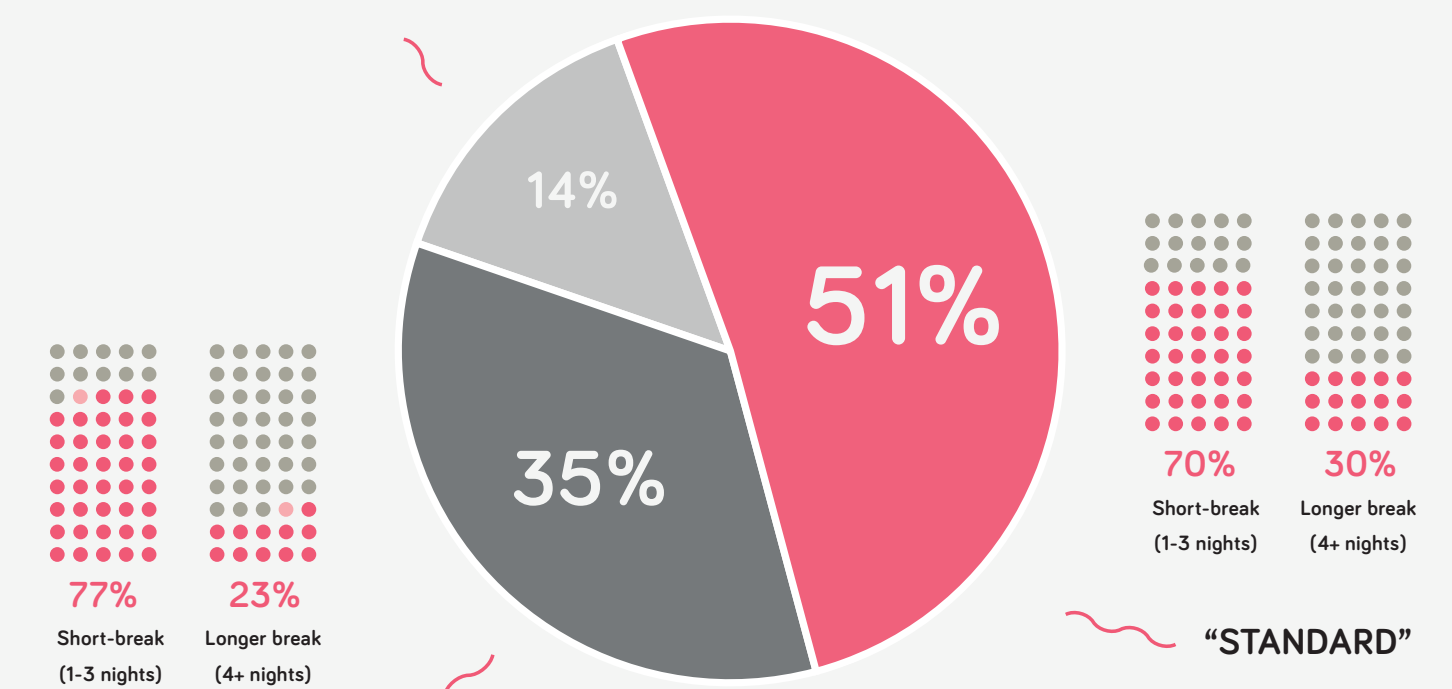
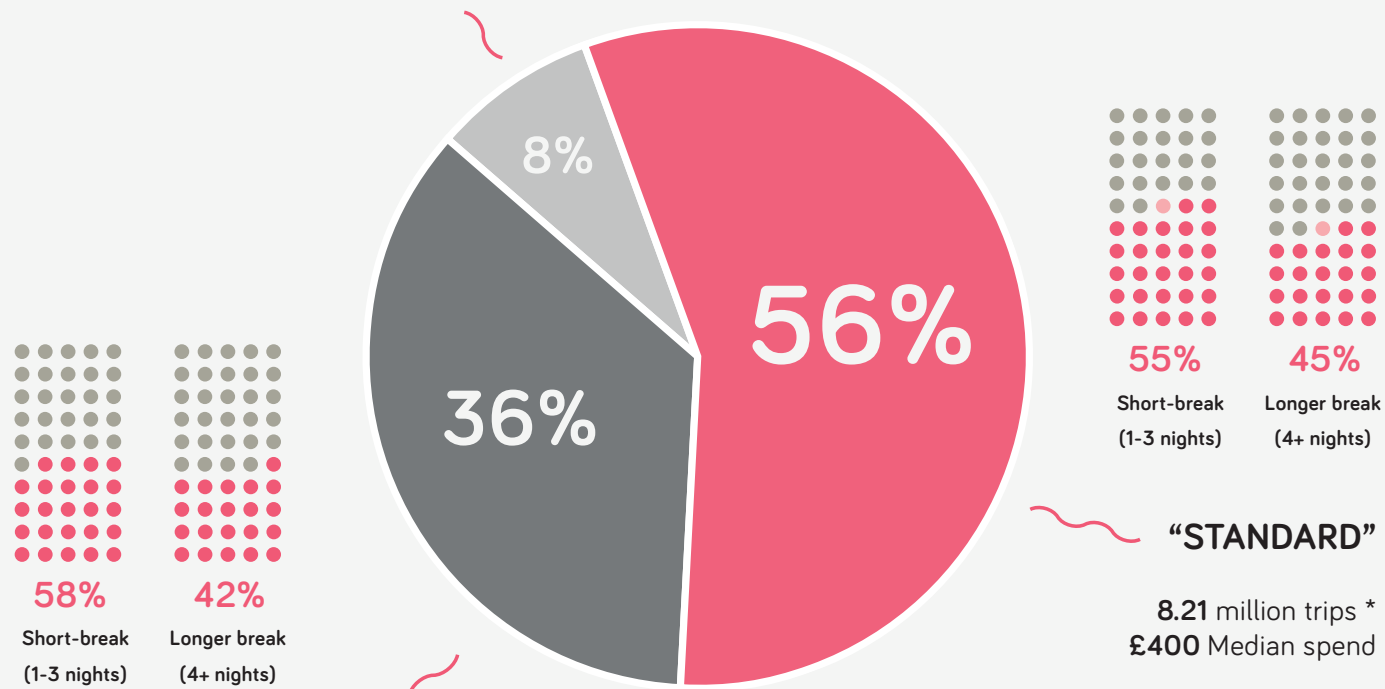
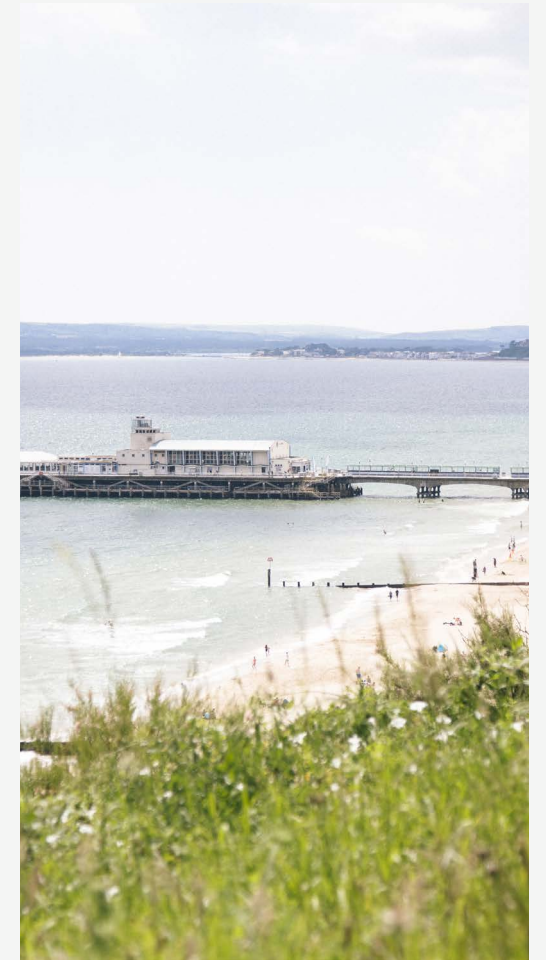
*The Global Wellness Tourism Economy' (2013), Global Spa and Wellness Summit / SRI International



WHAT CHARACTERISES THESE TRIPS?

Coastal wellness trips in the UK are significantly more likely to be **short breaks**, taken in **4 or 5 star** accommodation and comprise more AB visitors. Wellness breaks are also just as likely – if not more so, to be **shoulder season** breaks (particularly in May or June). That wellness breaks are more likely to be short breaks than ‘main’ holidays reflects a growing demand for ‘top-up travel’ between a main summer break and Christmas, with rebalancing and reconnecting common motivating factors, particularly for the affluent London wellness niche.

Wellness tourists are also typically **higher spenders**. International wellness tourists spend **59%** more than the average border-crossing tourist, and higher spend is also evident in UK coastal wellness breaks, where median spend of wellness visitors is more than twice that of ‘standard’ or ‘hedonistic’ trip spend in the case of Bournemouth.

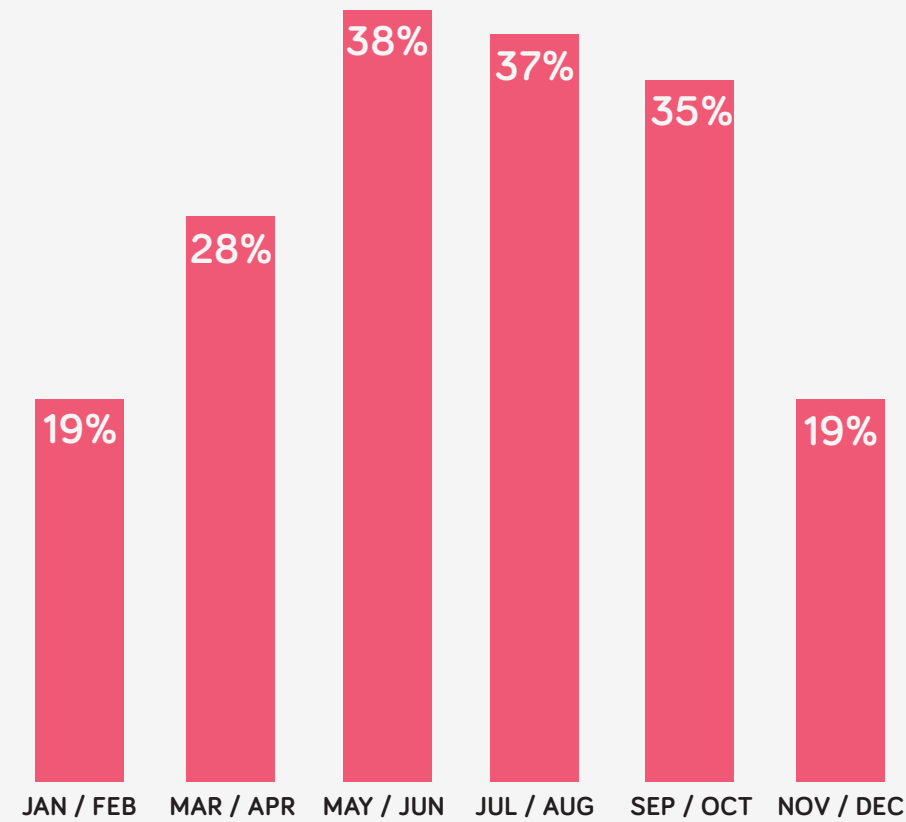


Purpose of most recent overnight coastal leisure trip, with trip length and associated trip spend

Purpose of most recent overnight leisure trip to Bournemouth, with trip length and associated trip spend

*share of 14.4million overnight domestic trips to the seaside for holiday purposes

*share of 0.96 million overnight domestic leisure trips



Net likelihood to take a wellness break or holiday by month

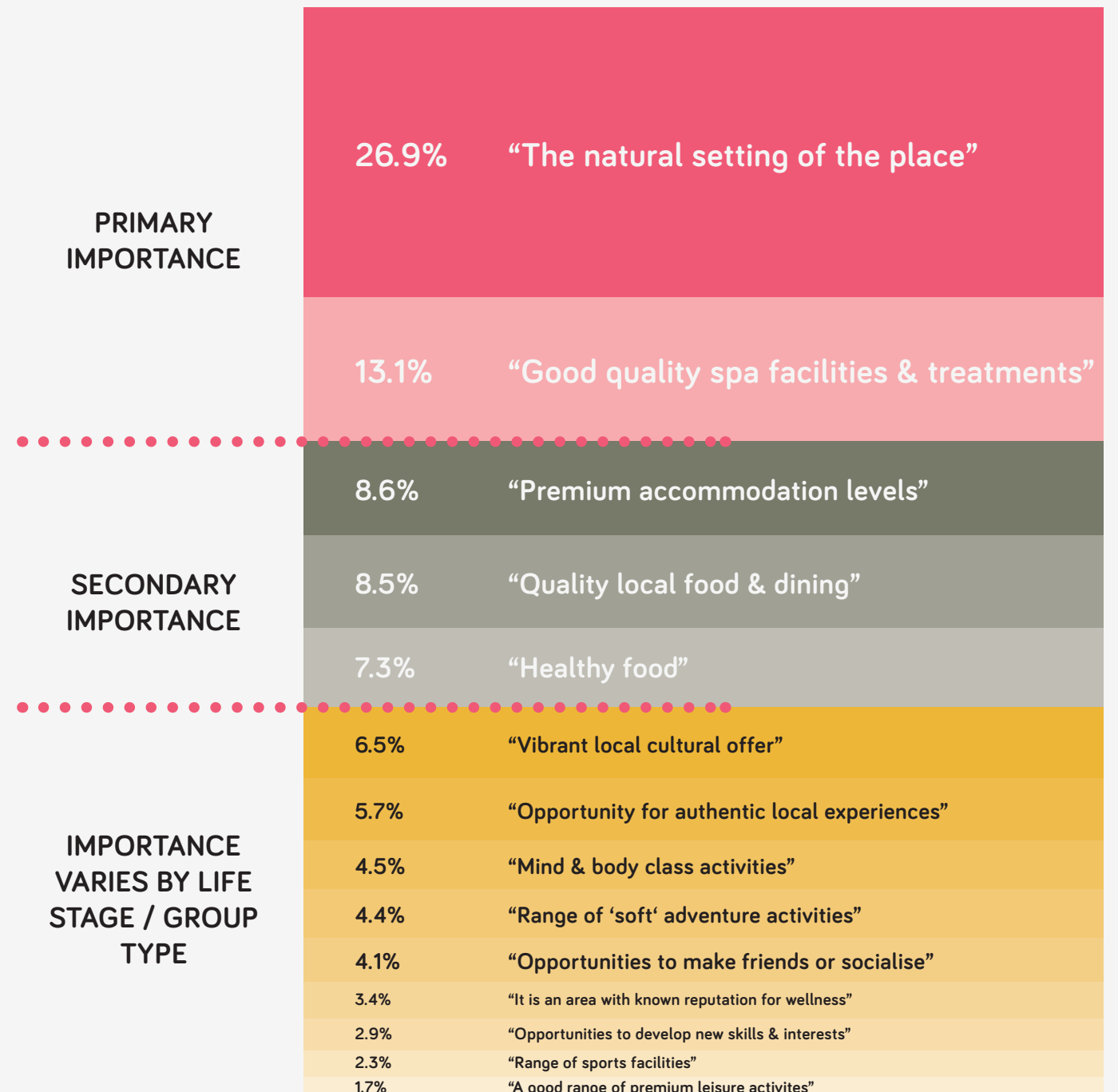
Demand for wellness breaks or holidays is slightly less seasonal than other leisure trips, suggesting a stronger shoulder season opportunity for coastal destinations.

WHAT ARE WELLNESS TOURISTS LOOKING FOR?

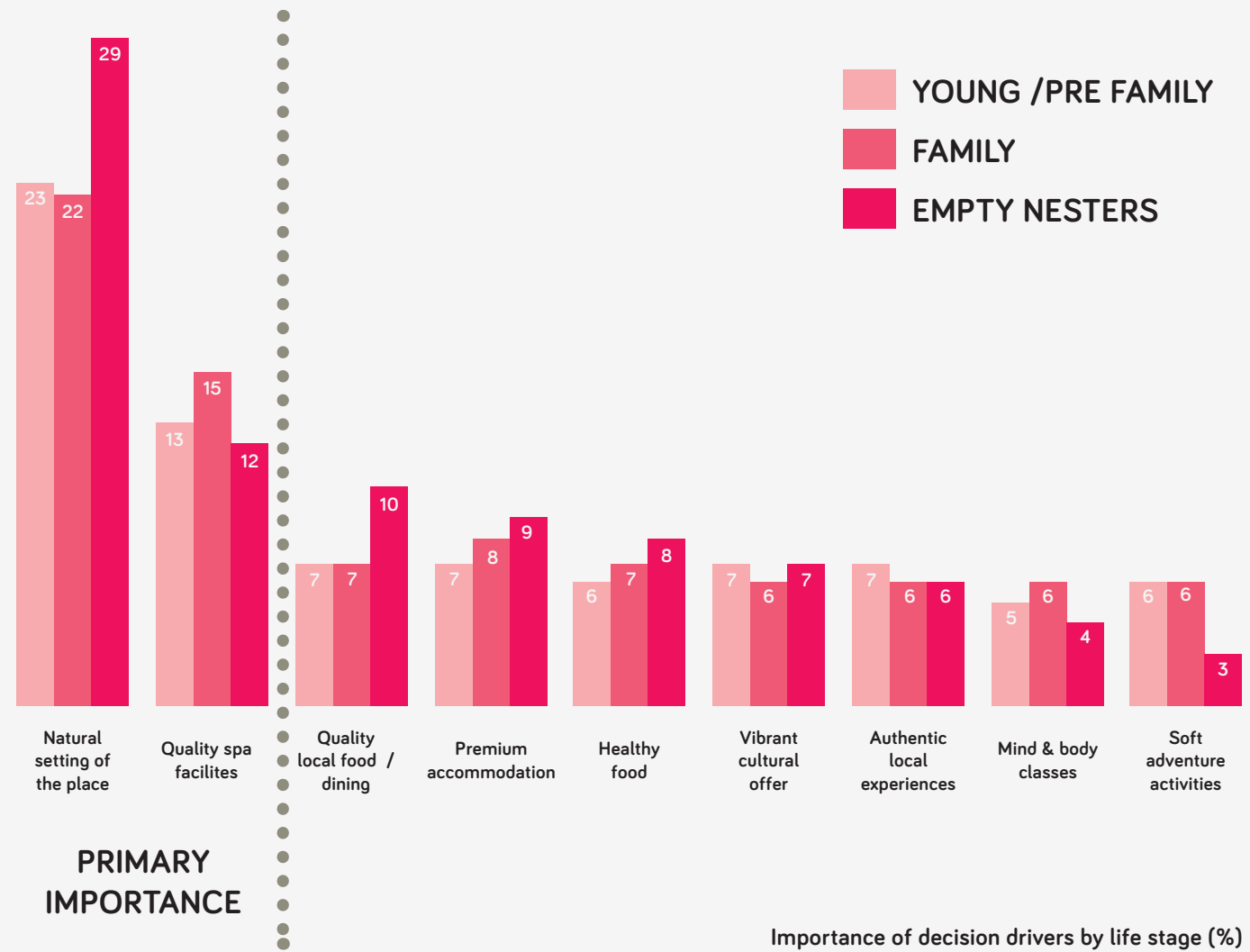
The quality of the natural setting is by far the most important consideration for primary wellness tourists. A natural setting of perceived high quality, whether coastal or not, is considered twice as important as other factors in promoting a wellness destination, although given the choice of a coastal, rural or urban setting for a dedicated wellness break, **59%** would instinctively prefer a coastal/seaside setting as opposed to **37%** preferring a rural/countryside setting and just **4%** preferring an urban setting. The biggest opportunity therefore for developing a wellness proposition lies in coastal destinations with a high quality natural setting. To a slightly lesser extent, good quality spa facilities and treatments, premium accommodation and good quality local food and dining options are also the hygiene factors of a successful wellness proposition.

The drivers of consideration vary by life stage. Whereas empty nesters (aged **55+**) in particular are driven by the natural setting of a destination, as well as the perceived quality of the local food and dining offer (with healthy eating increasingly important for this age group), pre-family and family groups will look for a wider range of attributes. A cultural offer, with authentic local experiences, is more important for pre-family; the 'active outdoors', involving 'soft' adventure activities such as cycling and walking, is also more important for pre-family and family groups.

Activities that also offer opportunities for learning and self-development will be of particular appeal to family groups (for example aerial based adventure activities – hang-gliding, balloon rides, zip wires) where a sense of achievement enhances wellbeing.



Drivers of consideration for a wellness break or holiday



FLASH IN THE PAN OR FULL STEAM AHEAD?

There's clear evidence that the market is growing – and fast. Current estimates suggest that demand for wellness breaks and holidays will outstrip supply in the next 3-5 years, so businesses and destinations recognising the potential of this lucrative market segment first will reap the biggest rewards.

It's worth noting too that by developing and marketing a wellness proposition, you're not necessarily alienating mainstream market segments. Rather, you'll be attracting new business from primary wellness visitors, at the same time as enhancing your overall market appeal. With the emerging societal shift towards wellness, influenced both by the media and public health policy, consumers will increasingly look for (and may well pay a premium for) wellness facilities and services on *any* type of trip.





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