CBI Product Factsheet:

Wellness tourism from Europe
Introduction

Wellness tourism is a growing segment within the global tourism market, as wellness minded consumers integrate their values and lifestyles into their travels. Europe is the number one global region for incoming wellness tourism trips and the second global region for wellness tourism expenditure. Citizens of several European countries have the tradition of visiting spas and wellness centres. Therefore, Europe is home to very sophisticated wellness and prevention-focused travellers. Although most outbound wellness trips take place within Europe, European wellness travellers have become increasingly interested in long haul wellness trips.

Product description

Product definition

Wellness tourism is travel associated with the pursuit of maintaining or enhancing one's physical and emotional wellbeing, based on relaxation and the proactive prevention of illnesses (Figure 1). Physical wellness includes for example visits to a spa and a variety of treatments such as beauty treatments, massages, detoxification, Ayurveda treatments and Thalassotherapy. Emotional wellness includes among others yoga, meditation and mindfulness. Medical treatments such as facelifts and corrections are not included, nor are fitness and other strenuous physical activities.

Figure 1: Demarcation of wellness tourism

Source: Global Wellness Institute

Traveller profile

European wellness travellers can be found in all age and income groups. A report by the Centre of Tourism Development divided German (health and) wellness travellers into six clearly differentiated consumer groups. According to industry experts, the same groups can also be distinguished in other European countries, although percentages may differ slightly from country to country.

The ambitious health vacationer (27% of wellness interested tourists)

This is the largest segment. They are more than averagely experienced with wellness vacations (27%) and the majority is aged between 40 and 69 (54%). They expect massages and body treatments. They have an interest in special wellness, health and fitness offers. Also, this segment has an interest in services with anti-ageing benefits, as well as mind-body retreats. They are likely to purchase additional products (e.g. oils or cosmetics). An additional 33% expects a swimming pool or water park.

Tips:

- Design your product around 'pampering' and 'stress reduction'. Communicate how your product can help escape the everyday hassle and recover from burnouts and tiredness.
- Consider offering additional products from your region (oil, scrub, soap).
The recreation seeking vacationer (25% of wellness interested tourists)

This is another large segment. More than half of this group’s members are between 20 and 49 years old. Their incomes lie between average and low. 25% has already had experiences with wellness holidays. During a wellness holiday they expect saunas, sauna landscapes and solariums. 61% wish to have massages and body treatments. Many of them also expect a swimming pool or water park (30%).

Tip:
• Provide a list of sauna activities and beauty treatments you can offer. Clearly state the price for each purchase.

The dignified bon-vivant (19% of wellness interested tourists)

People in this segment have medium incomes, 56% are 50 or older and 20% have previous experience with wellness holidays. This segment stands out because of its above-average interest in beauty treatments and basic additional products (e.g. cosmetics). Their expectations for a wellness holiday are exceptionally high. They expect an excellent atmosphere, nice hotel, good service, good food, leisure and cultural activities. The motives ‘relaxation’ and ‘well-being’ are extremely important to them.

Tips:
• Focus on offering quality, as this is the most important requirement for this segment.
• When you target the elderly travellers from this segment, communicate clearly how your services can provide health benefits (without emphasizing their age). Do not limit your offerings to physical wellbeing and pampering treatments, also offer ‘mind-body’ therapies.

The athletic and active vacationer (14% of wellness interested tourists)

This is (on average) the youngest segment, 42% are younger than 40 and their income is above average. They do not have much experience with wellness holidays (14%), and are mainly interested in all kinds of massages, body treatments, fitness and sports facilities. One third of them wish to have a sauna.

Tip:
• If you want to target this segment, also offer possibilities for active activities, especially activities that can be done outside.

The sceptic (11% of wellness interested tourists)

Members of this group have a sceptical or negative attitude towards wellness holidays. Personal restrictions (e.g. unable to travel) are often the reason for this attitude. People of this group are spread evenly across all income and age groups.

The problem-oriented novice (5% of wellness interested tourists)

This segment mainly consists of older travellers (60+), with almost no experience in the health and wellness sector (less than 5%). They are, however, interested in wellness tourism, but need a lot of persuasion.

Tip:
• It is not recommended to focus primarily on the sceptical and problem-oriented novice segments, as it will be difficult to persuade them into purchasing a long haul wellness holiday.

Product specifications

The following product specifications are important for European wellness travellers:

High levels of quality

European wellness travellers are generally experienced, sophisticated travellers (especially the ‘dignified bon-vivant’ segment). Many of them are senior travellers who expect quality and who generally need more comfort and service than younger age groups. Examples of important quality requirements are clean, secure and well-maintained facilities, personal...
attention to their specific needs, symptoms or complaints, knowledgeable and experienced advice on health or wellness, friendly staff, baggage service, comfortable rooms and beds with quiet nights and varying and healthy meals.

**Tips:**
- Not only focus on offering quality treatments, but also pay attention to facility design/decoration, ambience, comfort and hospitality. Provide for example relaxing background music or aroma scent and train staff to be polite and attentive.
- To provide personal attention to your guests’ specific needs, it is important that staff, such as beauty treatment practitioners, body massagers or yoga instructors, is knowledgeable. Wellness accommodations and providers of wellness treatments should train staff to become qualified in the service that they offer and emphasise their qualifications or certifications to ensure quality.

**Flexibility**

European wellness travellers increasingly seek flexibility. They value options of last minute bookings, as well as a variety of wellness offerings they can choose from.

**Tip:**
- Provide flexibility by offering last minute booking options and walk-in services. You can deal with unplanned customers by working with freelancers who can provide their services on short notice, preferably services other than your core offerings so that you can extend your product offering.

**Health enhancing components**

Most European wellness travellers are health conscious. When going on a wellness holiday, they often look for health enhancing components such as healthy eating and physical workouts. See also 'ambitious health vacationer'.

**Tips:**
- Include health enhancing components in your offer. Spa/wellness centres or hotels could for example offer healthy food, weight management counselling and physical activities like a gym, fitness classes or Pilates.
- Educate kitchen staff on nutrition, vitality, organic and dietetic food as European wellness travellers will find such services attractive.

**Authentic offerings**

At home, European wellness travellers are familiar with water-based treatments such as thermal spas. When they look for wellness holidays abroad, they increasingly seek new, authentic experiences or treatments. Such offerings can be very diverse, ranging from traditional/culturally-based therapies like acupuncture or body massage to mind-body retreats. Eastern wellness offerings such as yoga/meditation retreats or Thai traditional massages, for example, have gained significant popularity among European wellness travellers. They will find new, authentic products interesting as long as the product benefits are clear.

**Tips:**
- Offer a unique and differentiated product by combining location-specific and authentic elements, for example local natural assets and local traditions, skills or ingredients/herbs.
- Work together with local wellness or travel trade associations and together develop a national brand image as a wellness tourism destination. An approach for such development can be based on your country's traditional or natural-based wellness and healing traditions. Location-specific offers can become the 'signature treatment' of your destination, which also serves to distinguish your destination from competitors.

**Complementary non-wellness activities**

European wellness travellers are often also interested in non-wellness activities, especially:
- Active and natural components. Active walking, cycling, jogging or other physical exercise (especially if these can be performed in nature) are increasingly combined with wellness tourism and are particularly popular among the young elderly (50-65 years of age), as well as travellers from Austria and Scandinavia (See also the segments ‘ambitious health vacationer’ and ‘athletic and active vacationer’).
• Cultural components. Cultural and historical excursions are an interesting component of a wellness holiday, especially if cultural/historical attractions are unique to the destination.

Tips:
• Combine wellness treatments, physical activity and cultural activity. Instead of offering for example a basic treatment in a spa, offer additional options such as meditation and yoga done in a historical ashram or similar ambience or in a wellness retreat near the beach.
• Offer recreational activities in a beautiful natural setting, such as morning walking, cycling or jogging exercise in the forest.

What is the demand for wellness tourism from Europe?

Wellness tourism is a growing market

Wellness tourism is a growing segment within the global tourism market, as wellness-minded consumers integrate their values and lifestyles into their travels. Wellness tourism is estimated to account for around 6% of the global tourism market (including both domestic and international trips). In 2013, a total of 587 million wellness trips were made globally with a value of more than €456 billion, according to research by the Global Wellness Institute. This represents growth of almost 13% compared to 2012. According to the same research, wellness tourism accounts for 14% of all tourism expenditure and is growing much faster than the 7.3% growth rate for overall tourism expenditures from 2012 to 2013.

Europe is the largest market

Europe was the largest wellness tourism market in terms of number of trips, making up for almost 37% of the market (212 million trips). These figures show the tradition of visiting spas and wellness centres in Europe. Although 84% of the global wellness trips concerned domestic trips, wellness travellers have become increasingly interested in long haul wellness trips, offering opportunities for wellness tourism providers in Developing Countries.

Germany, France and the United Kingdom are the largest markets

Within Europe, Germany, France and the United Kingdom are the largest markets for wellness tourism (Figure 2). Note that these figures concern incoming trips and not outgoing. However, they do say something about the interest in wellness trips, as around 84% of the trips are estimated to be domestic. Furthermore, these countries are also the largest source markets for trips to Developing Countries in general (Refer to CBI’s ‘Trade Statistics’ for Tourism.) Other European countries with high potential for wellness tourism are Austria, Switzerland, Spain and Italy.

Figure 2: Top European wellness tourism markets, 2013, in million trips and expenditure in € billion

Source: Global Wellness Institute
Nearshore Developing Countries are most visited

For European travellers, Turkey, Ukraine and Morocco were the most popular Developing Country destinations in 2013 (Figure 3). In 2014, Egypt also regained ground. Turkey, Morocco and Egypt are also important tourism destinations for wellness tourism in particular. Other popular Developing Country wellness destinations for European wellness travellers are located especially in Asia Pacific (Japan, India, China, India, Thailand). Latin American Developing Countries such as Mexico, Brazil, Chile and Argentina are also gaining ground.

Figure 3: Most popular Developing Country destinations for EU28+Norway+Switzerland

Source: World Tourism Organisation (UNTWO)

For information on tourism trade statistics and macro-economic indicators in the European market in general, refer to CBI’s ‘Trade Statistics’ for Tourism.

Which trends offer opportunities on the European market for wellness tourism?

Increasing awareness of health

European consumers are becoming more aware of the importance of a healthy lifestyle and are taking preventive measures to maintain and improve their health. Wellness activities are no longer seen as a luxury. Many consumers now see massages and hydrotherapy as treatments for stress and chronic pain, facials as essentials to improve skin health, and reducing the effects of ageing and reflexology as part of regular health maintenance.
Increased focus on spiritual wellbeing

There is a growing demand for body-mind-spirit offerings in Western Europe. Meditation and yoga for example, are considered a holistic, integrated and lifestyle-oriented wellness tool. They are becoming more and more accepted for enhancing spiritual wellbeing, as well as enhancing cognitive functioning and performance (See also the segments ‘ambitious health vacationer’ and ‘dignified bon-vivant’).

Tip:
- Emphasise in your marketing activities how your wellness offering enhances your customer’s health and wellbeing.

Integration of health elements into travel

European travellers increasingly seek to integrate health and wellness elements into their trips. They choose hotels that offer healthy rooms, healthy menus, spas, fitness facilities and other wellness activities. Furthermore, as the pressure to lower health care costs in Europe continue, many alternative therapies (such as acupuncture or holistic treatments) are no longer paid for by health insurance. As these treatments are generally a lot cheaper in Developing Countries, this provides good opportunities for wellness tourism providers in Developing Countries.

Tips:
- Develop small wellness packages/building bricks that can be added to existing holiday packages.
- Emphasise in your marketing activities the affordability of your wellness services.

Authentic experiences

European wellness travellers are increasingly sophisticated and are looking for unique wellness experiences that are associated with authenticity and results. Wellness tourism providers have responded to this trend in different ways, for example by the development of locally-inspired built environments and spa treatments, adoption of traditional healing practices and local ingredients and new investments in thermal and mineral springs.

Tip:
- Make your wellness experience as authentic as possible, while keeping the standards and requirements of your target group in mind. Use, for example, local natural assets and local traditions, skills or ingredients/herbs or organise wellness activities amid special sceneries, for example yoga in the forest or on the beach.

Ageing population

Many European countries have ageing populations. With high cost of and long waiting lists for medical care in many European countries, an increasing number of European senior residents is seeking preventative wellness services (and healthcare) abroad. This trend is also driven by increased recognition and awareness of the health benefits of wellness treatments.

Tip:
- Target older European citizens and emphasise in your marketing activities the preventive wellness elements of your offering.
Male wellness travellers
The number of male wellness travellers is rising. Although there are no official statistics on the market size of this segment, the European wellness market hosts an increasing number of male wellness customers, who also go abroad for wellness services.

**Tip:**
- Look how you can adapt your current products to male customers or develop new products specifically targeted at men.

For information on tourism market trends in the European market in general, refer to CBI’s ‘Trends’ for Tourism.

Which requirements should wellness tourism comply with to be allowed on the European market?

**Musts**

**No legal European requirements**
There are no legal requirements for long haul wellness tourism as it is offered outside Europe. However, it is important to ensure your business complies with regulations in your own country.

**Tip:**
- Although European partners will not pass on legal requirements, you have to comply with the legal requirements in your own country. Check relevant regulations for the type of wellness product you provide, as well as regulations on health, sanitary and safety.

**Additional requirements**

**Reliability**
European tour operators are looking for reliable, professional partners. They therefore often request their partners to adhere to a code of conduct they have set up, generally including health and safety requirements, business ethics and social responsibility. Furthermore, they see membership of national and international sector associations and networks as proof of reliability and professionalism.

**Tips:**
- Study the codes of conduct of European tour operators and see how they correspond to your business practices. Adapt your business practices accordingly to increase your chances on the European market.
- Become a member of national and international sector associations and networks. For example your own country’s tourism trade association.

**Liability**
Many European travellers contract travel insurance before going on a holiday. However, European tour operators increasingly ask their partners for liability insurance to cover possible damage and accidents of their customers, especially when it concerns travel outside of Europe. This is because their own liability insurance does often not cover damage caused by third parties. Tourism providers in Developing Countries that have such insurance have a large advantage over those who have not. However, in many Developing Countries it is difficult to obtain liability insurances, as they are not offered yet.
Voluntary standards

Europe has a number of voluntary standards/certifications for the wellness industry. Some of these standards are international and can be applied by wellness providers around the world, for example:

- **European SPA standards**. These standards are initiated by the European Spa Association and contain quality and safety criteria for health and wellness providers.
- **Best Health International Standards**. These are international quality standards of Austrian origin for wellness and health tourism.
- **Wellness-hotels & resorts international**. Leading German quality standards for luxury wellness hotels and resorts. The fundamental principles of the W-H-I quality criteria have been adopted by several hotels and serve as suitable guideline for (upscale) wellness hotels.
- **Spa United Kingdom Code of Practice**. These are standards of quality and service within the United Kingdom spa industry.

Sustainability labels

European tour operators do not directly require sustainability labels, but if they can choose between sustainable businesses and comparable business without a label, they will often choose the sustainable option. Integrating sustainable elements into your product can therefore give you a competitive advantage. There are many different labels available for the global, European and local markets, making it difficult to choose or recognise a label. Examples of global credible sustainable and/or green tourism certification programmes are Green Globe, Rainforest Alliance and Travelife. There are also local sustainability initiatives, for example Smartvoyager in Ecuador, CST in Costa Rica and Green Lotus in Vietnam.

Tips:

- Communicate to your customers the importance of contracting travel insurance, especially if your company does not have liability insurance.
- Contract liability insurance and communicate that you have such insurance. If it is not possible to get liability insurance in your country, you should constantly push with your authorities and trade associations to make such insurance possible. Also discuss this with (potential) partners as they might have some influence as well.
- Obtain voluntary quality standards and certifications can help you to enhance competitiveness. However, it might not be financially feasible as the cost of implementation can be high and regulations can be rigorous. Nevertheless, using such standards as a guideline increases your chance to meet European wellness travellers’ expectations.
- Inform about local wellness standards. In Thailand for example, there are voluntary standards initiated by the Thai Ministry of Public Health, the Thai SPA Standards, which involve standards for service enterprises, methods for inspection and certification for health and beauty service enterprises. Adapting such standards ensures wellness travellers of some level of quality.
- Familiarise yourself with the requirements of sustainability certification to understand what is expected from suppliers. Consequently, integrate sustainable best practices into your product, for example policies for efficient electricity, water consumption and waste management. Also mention your concern for sustainability in your promotion. For more information, also refer to CBI’s Product Factsheet ‘European tour operators and their need for sustainable suppliers in Developing Countries’.
- Consider applying for sustainable certification to help you stand out from competitors. Find out if your country has its own sustainability label and apply for it. Make sure that the logo is visible on your website and that your company is visible on the website of the certification body.
- For an overview of other relevant standards for tourism, also check ITC’s Standardsmap.

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For information on tourism buyer requirements in the European market in general, refer to CBI’s ‘European Buyer Requirements’ for Tourism.
What competition do I face on the European wellness tourism market?

Competition on the European wellness tourism market is based on the same aspects as competition on the long haul tourism market in general. Therefore, refer to CBI’s ‘Competition’ for Tourism for more insights into your competition.

Also refer to CBI’s ‘Top 10 Tips for Doing Business with European Buyers’ for tips on how to prepare your first contact with European buyers or how to improve your existing relationship with European buyers and gain a competitive edge.

What do the trade channels and interesting market segments look like in the European market for wellness tourism?

The trade structure for wellness tourism from Europe does not differ significantly from the trade structure for European tourism to Developing Countries in general. The most important trade channels for wellness tourism providers in Developing Countries are local inbound tour operators, specialised wellness tour operators and direct sales. Refer to Figure 1 in CBI’s ‘Trade Channels and Segments’ for Tourism for an overview of the general trade structure for tourism.

Focus on specialised tour operators

Specialised wellness tour operators offer one of the best opportunities to enter the European wellness tourism market. Many European wellness travellers book through specialised wellness tour operators or travel agencies, because they have busy jobs and do not have the time and convenience to compose all holiday elements by themselves. In addition, many Developing Countries are still relatively unknown, emerging destinations and European tour operators that want to offer trips to Developing Countries are therefore quite dependant on local partners. European tour operators tend to work with inbound tour operators or Destination Management Companies that select travel packages for them.

Tips:

- Visit beauty and wellness trade fairs in your European target market. Another interesting trade fair to visit is the Global Wellness Summit which is held annually at different locations around the world.
- Tour operators and Destination Management Companies should contact tour operators in their European target market, preferably specialised in their country/region or wellness tourism.
- Wellness spas, hotels or resorts and providers of wellness treatments should focus both on inbound tour operators/Destination Management Companies and European tour operators.

Business through associations

Many European wellness travellers visit or are members of wellness clubs, for example spas, sports clubs or inner wellness clubs. Such membership organisations can be very useful sources to find potential customers, as they sometimes organise trips for their members.

Tip:

- Look for wellness clubs in your target county and visit their website. They often organise a small fair or issue magazines which can have specific offers for their members. You can advertise in their magazines or use them to promote your wellness offering through an advertorial or article about your destination.

Direct sales

With the emergence of the internet and social media, experienced European travellers increasingly approach local tourism providers directly, especially younger generations. As interest in wellness holidays is increasing, more direct bookings are expected in the next few years. Directly targeting European wellness travellers through the internet therefore also offers opportunities.
For information on tourism market channels and segments in the European market in general, refer to CBI’s 'Trade Channels and Segments’ for Tourism.

Also refer to CBI’s ‘Finding Buyers’ for tips on locating buyers in the European market.

**Useful sources**

- German Wellness Association - [http://www.wellnessverband.de](http://www.wellnessverband.de) - provides news, surveys, trends and statistics related to the wellness market in Germany.
- Global Wellness Summit - [http://www.globalwellnesssummit.com](http://www.globalwellnesssummit.com) - annual summit on the global spa and wellness market. Go to ‘Resources’ to find reports on the global wellness industry.
- The Spa Traveller - [http://www.thespatraveller.com](http://www.thespatraveller.com) - online wellness travel magazine.

For all CBI’s tourism related market intelligence documents, go to CBI’s ‘Market Intelligence Platform for Tourism’.