

# Entering the European market for wellness tourism products

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Yoga, spa, hot springs tourism, eating healthily and maintaining fitness are all important elements of wellness tourism. Although wellness tourism was severely impacted by the pandemic, the practice of personal wellness is now more important to consumers than ever before. Strict regulations around health, safety, cleanliness and qualifications are key to keep participants safe and generate confidence in local operators' abilities and professionalism.

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## 1. What requirements must wellness tourism products comply with to be allowed on the European market?

European tour operators that sell wellness tourism products to Europeans are bound by strict regulations to ensure the safety of their travellers and to protect them financially. Sustainable tourism is also an issue that is becoming more important to buyers, both European tour operators and European travellers. You should understand what these regulations are.

### What are the mandatory and additional requirements that buyers have?

The requirements that European tour operators have for wellness tourism products in developing countries cover the following:

- The European Package Travel Directive
- General Data Protection Regulation (GDPR)
- Liability Insurance and Insolvency Protection
- Sustainability and Responsible Tourism

As a first step, you should read the CBI's [What requirements must tourism services comply with to be allowed on the European market](#) – and specifically section 3, 'What are the requirements for niche markets' – and familiarise yourself with the comprehensive details of legal, non-legal and common requirements.

Since the UK's departure from the EU in January 2020, now commonly referred to as Brexit, it has been reported that both the [EU and the UK will make changes to the existing package travel rules](#). The changes are likely to focus on improving protection for customers and may not have too much impact on local suppliers. However, you should keep up with any developments.

Sustainability in the sector is discussed in more detail in the section [Embed sustainability tourism into your wellness tourism business](#) below.

## Travel restrictions post-COVID-19

Travel restrictions are being lifted around the world. Some countries continue to have travel restrictions in place but most demand that visitors are fully vaccinated visitors are permitted to enter – with or without the need for pre-arrival testing and/or self-isolating – or have a COVID-recovery certificate. Sometimes, unvaccinated persons must take a COVID-19 test before traveling. However, every country has different rules, and you should do your own research to find out what they are.

This is a useful [list of travel restrictions for every European country](#) that is updated regularly. And you can also have a look at [Re-open EU](#), an interactive tool developed by the European Union (EU) to provide information about the current COVID-19 situation in each country.

The EU Digital COVID Certificate system is widely used across the EU, and has made it easier for vaccinated travellers to travel more freely. Consult the European Commission for more information about the [EU Digital COVID Certificate](#).

Europeans travelling abroad to developing destinations will consult their own government's foreign travel advice websites along with that of the chosen destination. These are good websites to bookmark:

- Keep up-to-date with advice given to UK nationals about travel to all countries in the world on the government's [Foreign Travel Advice](#) page. Each country page also contains useful links to other nations' government websites.
- Consult the International Air Transport Association's (IATA) [interactive travel restrictions map](#) for travel restrictions in most other countries.
- Visit the relevant travel pages on your own government's website to ensure you are aware of the regulations and restrictions in place in your country and make sure you keep up-to-date with changes as they occur.

As tourism resumes, you should prepare your travel product for a European market that is keen to travel but will need reassurance that there are robust safety protocols and cleanliness measures in place to keep them safe. You must also establish new booking terms and conditions and clearly state what cancellation and waivers you will offer your buyers during the pandemic.

The World Travel & Tourism Council (WTTC) Safe Travels Scheme was launched to help rebuild consumer confidence, reduce risk and encourage travel to resume. The scheme was developed with other partners including the Adventure Travel Trade Association (ATTA). The measures created include:

- Reducing numbers of participants to allow for social distancing
- Ensuring activities are at the suitable difficulty level to reduce the need for rescue services
- Providing clear, consistent, and up-to-date communication on health and hygiene protocols
- Providing clear information about protocols such as face masks, hand hygiene guidance and social distancing requirements
- Encouraging online sales where possible
- Encouraging guests to handle their own equipment for the whole trip
- Limiting queuing and physical contact wherever possible

### Tips:

Consult the CBI study [How to respond to COVID-19 in the tourism sector](#) for tips on preparing for the future recovery of the tourism sector. The study includes detailed information about revising terms and conditions to help you amend yours.

Download WTTC's [Tour Operators - Global Protocols for the New Normal](#) for more details about the measures and decide whether to apply for the '[Safe Travels](#)' Stamp, which is free of charge.

Viator, the world's largest online travel agency (OTA) for trips, tours and experiences, has gathered a number of useful resources for tour and activity operators, [COVID-19: Resources and How to Navigate your Business through a Crisis](#).

## Requirements relating to the conflict in Ukraine

The humanitarian crisis unfolding because of the war is, of course, the most immediate life-changing issue facing families and communities in Ukraine.

Impact on the tourism industry is likely to be most felt by destinations traditionally visited by Ukrainian and Russian tourists, which will suffer from falling tourism arrivals and revenue. Examples include many developing countries such as Kazakhstan, Thailand and Turkey. Nationals from Eastern Europe, particularly from neighbouring countries may also be more reluctant to travel in these uncertain times.

Ukrainian airspace is closed, and Russian airspace is closed to many European countries and the US. This means that many major airlines must reroute flights which make journeys longer and/or more expensive to passengers.

### Tips:

Regularly check the [Pressroom section of the IATA website](#) to keep up with developments in the aviation sector.

Search the Internet for and read articles like these, [Ukraine crisis clouds Southeast Asia's fragile tourism recovery](#) and [What impact will the Russia-Ukraine conflict have on the tourism industry](#). However, make sure your sources are reputable as far as you are aware and that the articles are recent, as the conflict is an ever-changing event.

For the remainder of this report, all discussion, insight, and advice has been provided on the basis of travel in normal circumstances.

## What are the requirements for niche markets?

Wellness tourism is defined as travel associated with the pursuit of maintaining or enhancing one's personal wellbeing. It is a major tourism segment made up of several related tourism niches including wellness activities and fitness, religious and spiritual tourism, sun and beach tourism, food and wine tourism, and weddings and honeymoons.

Wellness tourism is a substantial segment of the wellness economy, which is globally valued at US\$4.4 trillion. Before COVID-19, wellness tourism was estimated to be worth US\$720.4 billion and growing strongly. However, as the chart below shows, the value of the segment fell substantially when the pandemic hit and was re-estimated to be worth US\$436 billion in 2020.

Figure 1: Value of the Global Wellness Economy



Source: Global Wellness Institute

However, the pandemic has led to an ongoing trend of maintaining personal wellbeing and fitness, including while travelling. Driven by traveller values that include a desire to be out in nature, to live more simply sustainably, and to nourish personal mental wellbeing, the market is predicted to recover strongly. An [annual growth of 20.9% is expected](#), reaching a value of US\$1.1 trillion by the end of 2025. This outstrips the anticipated growth projection of 9.9% annually for the entire global wellness economy.

Wellness tourism is available all over the world and different destinations can offer their own distinctive wellness experiences. Wellness activities in a destination are often linked with local cultures, the natural assets of a place and local culinary specialities. Because of the diversity of the global landscape, a huge range of unique and authentic wellness activities are often based on indigenous healing practices, ancient and/or spiritual traditions, the existence of naturally occurring waters with special/mineral properties, mud baths and so on.

Figure 2: Global Wellness Destinations



Source: Global Wellness Institute

## Requirements for wellness destinations and providers

As such, the most important requirements for a successful wellness destination and/or wellness provider rely on a mix of natural and environmental factors, suitable infrastructure (buildings and facilities), sustainable business practices and well-qualified and competent practitioners. Below you will find a checklist that examines the tangible and intangible requirements of a wellness tourism business.

### Checklist of Requirements for a Wellness Tourism Business

Assess your own destination and current tourism business against this checklist of requirements to establish where your strengths and weaknesses are.

Ideally, a successful wellness tourism business must have:

- *Natural assets* that fit well with the provision of wellness tourism. This is a very broad requirement as wellness tourism activities can be practiced in many landscapes – mountains, forests, beaches, areas where there are mineral/salt waters, hot springs, mud baths and so on.
- A *peaceful location* that feels ‘removed’ from the stresses of everyday life. Many wellness destinations discourage Internet connectivity and do not provide Wi-Fi so their guests can have a truly immersive wellness experience.
- A destination that is *safe and secure*. Wellness travellers will not choose a place they do not believe to be safe for them to travel to or stay at. They seek peace and tranquillity that cannot be found in places that may be subject to political instability, even if they only think it to be true.
- Infrastructure and facilities that are *clean and sanitary* for both domestic and international visitors. Cleanliness is paramount for wellness tourism – especially after the pandemic.
- *Sustainable actions* incorporated. Wellness tourism and wellness travel also encompass wellness for the planet so sustainability is a key requirement for all wellness tourism businesses. It is essential that wellness tourism businesses have sustainability policies and practices in place to attract sustainability-conscious travellers. See the section [Embed sustainability into your wellness tourism business](#) below.
- *Employment opportunities for local people*. A sustainable tourism business must also make sure to employ local people – who should be paid a fair wage, receive proper training and have good working conditions.

Wherever possible, locally made produce, products and other services should be available for sale.

- *Qualified and professional practitioners* in their relevant fields of expertise, whether they are yoga/Pilates instructors, providers of holistic and/or alternative therapies, masseuses or otherwise.
- *Healthy food* that has been sustainably sourced – often vegetarian and increasingly vegan – is a key factor of wellness tourism. Provision of a wide range of healthy cuisine prepared by local chefs, preferably with ingredients that are locally sourced and/or grown, and/or organically produced where possible. Animal produce must be sourced from reputable suppliers which operate to high levels of animal welfare.
- Availability of a *wide range of additional fitness-based activities* such as swimming, yoga, hiking, cycling, fitness classes, kayaking/canoeing or stand up paddleboarding (SUP). Local sightseeing trips and/or tours to local festivals and markets also add value to wellness tourism.

### Tips:

For more information about wellness tourism and associated niches, have a look at the CBI infographic [Which European tourism market segments should you target](#).

For practical advice on setting up a new tourism product, download the CBI study [How to get started developing your tourism product](#).

## Embed sustainability into your wellness tourism business

Sustainability is now more important than ever in all areas of tourism provision. There is a very close link between personal wellness and the wellness of the planet, which means that it is essential for wellness tourism providers to make their products sustainable.

Today, wellness tourism is often more than just taking part in ‘yoga on the beach’. It is also about culturally immersive interactions and getting involved in supporting sustainable initiatives that might be conservation, restoration, zero waste or contributing towards carbon neutrality. Sometimes this type of hands-on tourism activity is referred to as regenerative tourism – a developing concept where sustainable tourism activities make the place better than when they arrived, rather than just maintaining the current situation.

## Best Practice: Examples of sustainability in wellness tourism

Many wellness tourists care for the environment, want to support local people and help preserve their culture while minimising their impact on the destination. Here are some good examples of destinations and providers that have successfully implemented sustainability into their wellness tourism businesses.

Some of these operators are large players in the tourism industry and have big budgets to support their activities. However, many of their ideas can be easily adapted by small, local operators in order to also commit to becoming waste free/plastic free and take other realistic actions.

- Besides being very beautiful, coral reefs are essential for the health of the planet. They protect the coast from erosion and storm damage, keep the ocean water healthy and are nurseries for many fish species. The [Kokomo Island Wellness Resort in Fiji](#) encourages guests to take part in all stages of the coral restoration process and has restored many thousands of corals to date.
- The [Sixth Senses resort in Ninh Van Bay in Vietnam](#) also offers guests the opportunity of taking part in coral restoration programmes.
- The [Como Hotel in Maalifushi](#) in the Maldives encourages guests to sponsor coral frames which are planted on the seabed as part of their coral conservation initiative. Sponsors can track the progress of coral growth via regular updates and are invited to join complimentary underwater dives when they visit.

- In St Lucia, the [Body Holiday wellness resort](#) offers its guests an educational ‘farm to table’ food experience, teaching the Rastafarian culture of clean eating and organic farming. This includes harvesting ingredients and preparing a meal that provides exactly the right nutrients for maximum health and energy. It is also a good example of a wellness experience combined with an immersive cultural exchange.
- The Iberostar hotel chain has launched an innovative sustainability tourism programme called the [Wave of Chain](#), that has three major aims for all its properties: become waste free by 2025, source 100% of its seafood responsibly by 2025, and ensure the ecosystems that surround their properties are healthy (such as coral reefs) by 2030.
- From a destination perspective, [Slovenia Green](#) is a national certification scheme that supports all tourism providers to implement and/or improve their sustainability efforts. Visiting the mountainous resort of Rogla in the Pohorje Mountains is all about wellness – experiencing authentic tradition in green, unspoiled nature. Wellness activities are walking, cycling (pedal power or electric), consuming locally grown food, taking part in local tasks to support the local lifestyle and preserve traditional cultures.

European wellness tourists like to know their trips are not having a negative impact on the destination. Being certified as a sustainable tourism business through a recognised certification scheme like [Travelife](#) is a good way to show your customers that you understand and have implemented sustainable business practices. Even if you are not certified, you must embed sustainability into your business and make sure you tell your customers what you are doing to reduce your carbon footprint and support local economies.

### Tips:

Assess your business to see how you can either implement or improve your sustainability efforts, using the study to help you. Make a list of everything you currently do as a starting point.

Do your research to find out about sustainability in tourism. The CBI study [How to be a sustainable tourism business](#) is a good place to start.

Decide whether you should apply for certification as a sustainable tourism business with [Travelife](#) or similar.

To find out more about regenerative tourism, consult the new CBI report [Regenerative tourism: moving beyond sustainable and responsible tourism](#).

## Adopt wellness industry standards

To sell to the European market, it is essential that you have stringent health, hygiene and safety protocols in place. Practitioners and therapists must also be qualified at least to the standards expected in your country. If you can establish standards above and beyond these, this will give you a competitive advantage.

Applying international standards to your wellness tourism product is a good way to inform your customers that you are offering a good-quality product and that you understand fully the issues of the sector. The ISO offers two wellness tourism standards for you to consider:

- [ISO 17679:2016 Wellness Spa](#) – establishes the service requirements of a wellness spa, the main supporting processes and quality of service provided to the client.
- [ISO 17680:2015 Thalassotherapy](#) – establishes the service requirements for businesses using treatments derived from the marine environment.

There is a series of European standards and certifications for providers of wellness tourism providers in Europe which you should be aware of. The standards that Europeans expect from wellness tourism providers are useful

benchmarks for you to apply to your wellness tourism product. Look at the following standards to see what you might be able to apply to your own business:

- [EuropeSpa](#) – featuring quality and safety criteria and offering a certification programme
- [Wellness-Hotels & Resorts](#) – is a German organisation with a network of wellness hotels and resorts that confirm to its set of criteria.

## 2. Through what channels can you get wellness tourism products on the European market?

### How is the end-market segmented?

The market is segmented into two types of wellness traveller:

- Primary wellness travellers – people who travel to wellness destinations, hotels, resorts, spas or retreats for the specific purpose of wellness. They are very focused on their own personal wellness and tend to expect a specific outcome from their wellness trip – recovery, resolving health issues, developing their quest for wellness.
- Secondary wellness travellers – people who participate in wellness activities while taking a general leisure or business trip. They are more interested in the cultural link between a destination and the wellness remedies that are special to it.

The table below shows how to distinguish between primary and secondary wellness tourists.

Table 1: Wellness tourism activities taken by Primary and Secondary Wellness Tourists

Primary Wellness Travel	Secondary Wellness Travel
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<p>A Primary Wellness Tourist will:</p> <ul style="list-style-type: none"> <li>• Take a one-week or two-week wellness holiday at a wellness destination resort (spa, resort, hotel) or other specific wellness centre/retreat.</li> <li>• Take a short break of 2-4 days at a hot springs resort or yoga/wellness activity retreat.</li> <li>• Stay at an Ashram or other meditation/yoga retreat for a short break, or longer.</li> <li>• Take a weekend break at a spa or wellness hotel for rejuvenation and stress relief</li> <li>• Travel to a wellness centre for a comprehensive health check-up.</li> <li>• Take a wellness cruise on a wellness-specific ship.</li> <li>• Stay at a yoga retreat that includes healthy food and meditation in a natural environment.</li> </ul>	<p>A Secondary Wellness Tourist will:</p> <ul style="list-style-type: none"> <li>• Choose to stay at a wellness hotel, eat healthy food and take part in fitness activities during a broader leisure or business trip.</li> <li>• Be part of a family, couple, or group of friends that spend a day/afternoon at a hot springs destination as part of a wider holiday trip.</li> <li>• Enjoy a holiday at a beach resort/destination and make one or more visits to a spa/salon during the trip.</li> <li>• Be a cruise tourist that selects a ship with wellness activities (but is not a wellness cruise), or spontaneously takes part in wellness activities whilst on a cruise.</li> <li>• Be an adventure tourist that visits a spa after a long day hiking, trekking, biking etc.</li> <li>• As part of group tour, have a Thai massage, visit a Turkish hammam, have reflexology treatment or take part in a yoga session, either as part of the tour experience or in their free time on the tour.</li> </ul>
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Source: Acorn Tourism Consulting

Secondary wellness travellers account for almost 9 in every 10 wellness trips taken worldwide (89%) and 86% of total expenditure. This is good news for small, local operators who can attract spontaneous leisure travellers who are keen to take part in wellness while on an overseas trip.

The market is also segmented by:

- Domestic wellness travellers – the biggest global market by some margin, accounting for 82% of trips and 65% of total expenditure. Domestic wellness travellers are an important market that should be included in marketing activities by local wellness tour operators.
- International wellness travellers – which is a smaller market but generates more expenditure per person.

The European market of wellness tourists is very large. Europeans took more wellness trips in 2019 than any other market (333.5 million trips). They spent US\$248.2 billion on wellness tourism, the second-largest amount after North American wellness tourists.



## Understanding the motivations of wellness tourists

When considering who to target your wellness product to, it is important to understand the needs and motivations of wellness tourists. The table below shows how wellness tourists are motivated to find what they are seeking to achieve, what they will do and where they will go to get what they need.

Table 2: Motivations of, and Activities Enjoyed by, Wellness Tourists

SEEK	DO	VISIT
Physical	<i>Fitness</i> – fitness classes, stretching, Pilates <i>Healthy Eating</i> – nutrition, weight management, detox, culinary experiences, vegetarian/vegan <i>Health</i> – check-ups, diagnostics, chronic condition management <i>Spa &amp; Beauty</i> – massage, bathing, body treatments, facials, hair & nails	Gyms, Fitness Centres  Organic, natural restaurants  Wellness Centres, Health Centres  Wellness hotels, wellness cruises, health resorts, spas & salons, baths & springs, Thalassa
Mental	<i>Mind-body</i> – yoga, meditation, Tai Chi, Qigong, Biofeedback	Yoga studios, martial arts studios
Spiritual	<i>Spiritual &amp; Connection</i> – praying, time with family, time alone, volunteering	Yoga retreats, spiritual retreats, Ashrams
Emotional	<i>Personal Growth</i> – retreats, life coaching, reducing stress, reading, music & arts	Lifestyle retreats, wellness retreats
Environmental	<i>Eco &amp; Adventure</i> – hiking, biking, walking, nature visits	Parks, Wildlife Sanctuaries, Nature Reserves

Source: Global Wellness Institute/Acorn Tourism Consulting

You can also refer to this table when developing your wellness tourism product to understand who your target

customer is and which is the best way to reach them (see the section [Through what channels do wellness tourism products end up on the end-market?](#) below.)

### Tips:

Target the secondary wellness tourist. It offers the best potential to develop your wellness tourism product.

Also target the domestic secondary wellness tourist. It is a large, readymade market and is likely to be less seasonal than the international secondary wellness tourist.

Assess your wellness product against the values, motivations and goals of the primary and secondary wellness traveller markets to ensure you are delivering what they are expecting of you.

## Through what channels do wellness tourism products end up on the end-market?

The chart below shows the different sales processes used by primary and secondary wellness tourists to purchase their holidays.

Figure 3: The Sales Process of Wellness Tourism Holidays and Experiences



Source: Acorn Tourism Consulting

### Wellness Experiences

Local provider/operator of wellness experiences like yoga sessions, spa trips, therapeutic treatments, massages, active wellness and culinary experiences

Wellness accommodation provider with associated wellness experiences on site, e.g. an Ashram

### Direct Sales

Primary wellness tourists will purchase their holiday either directly with the retreat/resort or hotel of their choice or via a specialist wellness tour operator like [Health & Fitness Travel](#). Specialist operators like this carefully curate holidays for their customers and usually use 'tried and tested' experience suppliers who they know have the relevant expertise and qualifications.

More examples of European wellness tour operators include:

- UK – [Healing Holidays](#); [Wellbeing Escapes](#); [The Healthy Holiday Company](#)
- Germany – [Wellnessurlaub](#); [TUI](#); [Urlaubsguru](#)
- France – [Pierre & Vacances](#); [Nomade Aventure](#)
- Netherlands – [Wellness Vakantie](#); [Spa Dreams](#)

Secondary wellness tourists use a range of suppliers to directly purchase wellness tourism products. They will make direct sales that are either online (through your website or via social media platform) or offline (phone sales, walk-in).

## Indirect Sales

Secondary wellness tourists are also more 'opportunistic' which means they are more likely to make decisions in the spur of the moment and make indirect sales through OTAs like [Viator](#).

Wellness is a very large category on OTAs that specialise in trips and experiences. If you type 'wellness' into the search bar on Viator, you can see there more than 88,500 wellness experiences listed on the platform, worldwide. By comparison, there are 64,000 adventure listings and almost 95,000 nature listings.

Figure 4: Wellness Experiences Listed on Viator (July 2022)



Source: Viator

There are many examples of OTAs promoting wellness trips, tours and experiences. These are some of the best known. Explore their 'How to Sign Up' sections using the links below to see if they would be a good fit for your business:

- [Viator](#)
- [Airbnb Experiences](#)
- [Klook](#)
- [GetYourGuide](#)
- [Trip.com](#)
- [Expedia Local Expert](#)
- [Musement](#)

## What is the most interesting channel for you?

It is more difficult to sell your products directly to European specialist wellness tour operators. You must be able to prove that your practitioners are experts and highly qualified and/or that your premises is operated to an extremely high standard, based on European standards. They demand that strict regulations and robust health and safety policies are in place to protect their clients. To meet their needs, many of these regulations will be expensive to put in place.

For local Small and Medium Enterprises (SMEs) offering wellness experiences like therapeutic treatments, massage, yoga and other active wellness products, online travel agents such as Viator are your best option. You should also look at building relationships with inbound tour operators and your local tourist board to see if you can include your products in their itineraries.

To maximise your success in selling through OTAs, you should have a website and use your social media channels to encourage wellness tourists to visit your website.

## Build professional contacts and network with wellness tourism professionals

The wellness industry is very large and there are many different types of companies, organisations, government departments and wellness services and businesses that cross over or have some link with wellness tourism. Networking the wellness professionals in the broader wellness market will help you develop good partnerships with associated businesses. This chart gives a broad outline of all the different stakeholders within the wellness industry.

Figure 5: Key Wellness Tourism Stakeholders



### **Tips:**

Improve your online presence. Download and study the CBI study [How to be a successful tourism company online](#).

Build a network of wellness professionals and wellness tourism contacts as they will be useful to you in developing your wellness tourism business. The main wellness industry associations are the [Global Wellness Institute](#) and the [Wellness Tourism Association](#). You should bookmark their websites as they offer a range of useful advice and research online.

## **3. What competition will you face in the wellness tourism market?**

### **Which countries are you competing with?**

The top destinations markets in developing countries for global wellness tourism in 2019 were Costa Rica, India, Indonesia, Mexico, Thailand and Turkey. However, you should take into account that there are many more countries that offer wellness tourism, and these may include your own country and/or your neighbours.

#### **Costa Rica**

Costa Rica is a good example of how wellness tourism crosses over with adventure tourism to provide wellness experiences that are beneficial physically and mentally. Examples of 'wellness/adventure' experiences that are 'life-affirming' include whale watching in the Ballena Marine National Park, hiking with capuchin monkeys in Corcovado National Park, and exploring primeval rainforests in Tirimbina.

As one of the world's best-known eco-destinations, Costa Rica is well-placed for wellness tourism. Wellness retreats offer a variety of activities including medicine walks, Qi Gong, naturopathy, reiki, coffee scrubs, digital detoxes and more. Costa Rica Tourism's wellness strategy, [Wellness Pura Vida](#), was established in 2018 to support the development of the sector as a catalyst for social and economic growth in seven regions across the country.

#### **India**

India is one of the world's great spiritual destinations and has been a must-visit destination for many decades for those in search of spiritual enlightenment. It is the birthplace of the traditional wellness practices of Ayurveda and meditation, and there are wellness retreats all over the country. Major wellness areas in India are Kerala (for Ayurveda), Goa (yoga on the beach, healthy eating) and the Himalaya region (for spiritual retreats).

The Ministry of Tourism has been building on opportunities to develop wellness tourism. Luxury hotel chains and independent boutique hotels are leading the way in investment in the market. The domestic market of wellness tourists is very large – [56 million nationals made wellness trips at home and abroad in 2017](#), an increase of 45% since 2015. Before the pandemic, the market was anticipating a compound annual growth rate (CAGR) of 12% between 2017 and 2020.

#### **Indonesia (Bali)**

Bali is home to large numbers of wellness retreats, usually located in beautiful, tranquil surroundings of lush tropical gardens and surrounded by waterfalls and natural pools. Water massages, full-moon yoga classes and Balinese mud masks are some of the more unique wellness offerings. For secondary wellness visitors, Bali also

provides a wide range of accessible and cheap massage and spa treatments.

In 2021, Bali was voted Asia's Best Spa Destination in the World Travel Awards for the range and quality of spa resorts throughout the island country. There are around 3,200 traditional wellness centres on the island and tourism stakeholders are looking to create a stronger network and implement more robust regulations to ensure compliance with the country's wellness standards.

## Mexico

Mexico has a very strong wellness tourism sector and is particularly known for its spa industry and thermal/mineral springs. The town of Tepoztlán is one of Mexico's oldest destinations for wellness tourism and is home to *temazcales*, or hot springs. Purification rituals and techniques adopted by the Mayan culture are common features in wellness businesses in Mérida on the Yucatán Peninsula – where you will also find the ancient city of Tulum, yet another leading wellness destination.

Although one of the largest megacities in the world with a population of more than 10 million, Mexico City also promotes the cocoa ritual, a more unusual wellness activity. The mystical ritual involves filling the senses with cocoa vapour resulting in a 'release process' that consists of shouting out positive phrases like, 'I want my happiness'.

## Thailand

Thailand is a popular and highly regarded destination for both primary and secondary wellness tourists. The country is well known for a vast number of high-quality wellness tourism resorts and hotels, and the local wellness and spa properties are often winners and/or nominees in global award ceremonies like Asia's Best Wellness Retreat and World's Best Spa.

Through the predominant contemplative religion of Buddhism, wellness in Thailand is inextricably linked with meditation and there are many beautiful, tranquil wellness retreats all over the country that are located on beaches, in temples and tropical gardens and jungles, offering an excellent base for wellness tourism.

Wellness tourism in Thailand is expected to grow and in 2020 (pre-pandemic), [wellness arrivals were expected to rise to 27.7 million by 2022](#), a CAGR of 5.6% from 2019.

## Turkey

Turkey is one of the world's leading destinations in terms of tourist arrivals. Since the Romans discovered the therapeutic powers of thermal springs, the associated Turkish hammam and massage treatments have been perfected over the years. The country has almost 1,500 natural thermal springs, largely scattered throughout western Anatolia, Turkey's top tourist region. The spectacular landscape of Pamukkale, known for mineral rich thermal waters flowing over bright white terraces, is one of Turkey's leading tourist attractions with more than 2 million annual visitors.

In 2019, Turkey's hot springs generated about [US\\$1 billion in tourist revenue](#).

The Ministry of Tourism is working to develop Turkey's spa tourism further and a masterplan developed in 2017 aimed to position the country as a major health and thermal destination, attracting 1 million tourists to thermal tourism by 2023. One of the supporting initiatives was to distribute brochures on Turkey's thermal springs to tourists arriving by air.

### Tips:

Research competing nations' wellness offers in your region to see who is offering what.

Assess the wellness tourism industry locally so you can see where there are gaps for new businesses.

Make sure you apply to be a member of any local wellness associations so you can network with them.

Include any memberships on your website.

## Which companies are you competing with?

### Costa Rica

[Amazing Costa Rica](#) offers trips that combine wellness and adventure. Examples of trips include a visit to La Fortuna, a town close to the Arenal Volcano to enjoy swimming in a natural pool, visiting waterfall gardens and taking a chocolate tour. This combination of activities contributes to an overall sense of wellbeing through exposure to nature. The operator has included a blog on its website about [Wellness tourism in Costa Rica](#) which gives an interesting insight into the sector in the country.

[Go Tours Costa Rica](#) provides day trips and holiday packages throughout Costa Rica. All trips and holidays include elements of adventure and nature, and the natural and cultural richness of the peaceful land are emphasised. The operator has received Tripadvisor's Certificate of Excellence for 8 consecutive years between 2012 and 2019 which provides customers with good evidence of the quality of its service.

The operator also makes good use its social media channels with links to Facebook, Instagram and Twitter. It is important to have these links as it will help to improve your business's online presence.

### India

[Parmarth Niketan](#) is a spiritual retreat (ashram) located on the banks of the River Ganges and in the foothills of the Himalaya Mountains. Yoga, prayers and contemplation/meditation are the main activities and every evening at sunset, hundreds of visitors from many different cultures gather for [Ganga Aarti](#), a devotional ritual which uses fire as an offering to Goddess Ganga. There are also a number of wellness treatments available including Ayurveda, as well as programmes hosted by cultural, spiritual and environmental leaders.

The organisation has a good website which is kept current and up-to-date with news articles and events. There is plenty of information for future visitors about life on the ashram and detailed information about the yoga calendar. Customer testimonials feature on the homepage and several are from European visitors.

[Tour My India](#) (TMI) offers a comprehensive range of experiences and holiday packages to wellness destinations all over India. There is a huge choice of treatment packages for wellness tourists, for instance to combine yoga and meditation, Ayurveda with a spice tour, spirituality and Ayurveda, garden retreats and so on. Its homepage is very detailed and informative which is helpful for tourists to make informed decisions.

It is upfront about why customers should choose to do business with them, offering reassurance and expertise and indicating professionalism. The figure below shows how TMI communicates this to their customers on its website, so try to see if you could design something similar for yours. Including certification and membership with national and/or international tourism associations offers reassurance to European travellers that the operator is professional.

Figure 6: Why Tour My India for Ayurveda Tours?



Source: TMI

## Indonesia (Bali)

[Bali Bucket List Tours](#) is a small adventure tour operator that offers a select number of tours throughout the island. Tours are typically all-inclusive (excluding international flights) so all transfers, accommodation and activities are included. They offer four different yoga packages that are either 4 or 7-day packages, some of which include additional activities like surfing.

The website is nicely designed with a contemporary look and features inspirational images of Bali's beautiful landscape and people doing activities. There is lots of detailed information about Bali and essential information which helps to foster confidence and attract customers. There is also a blog page which is good for search engine optimisation (SEO) – a process that helps your website be more visible to search engines.

## Mexico

[Mexico Kan Tours](#) specialises in providing tours in Mexico that support conservation efforts and connect with nature. The operator includes its sustainable credentials clearly on its homepage using simple icons, as you can see in the screenshot below. Tour operators with strong sustainable credentials are becoming more important to European travellers today. The infographic below is a clear and simple way that the operator explains its sustainability efforts.

Figure 7: Mexico Kan Tours – Travel with Intention



Source: Mexico Kan Tours

The tours offer a combination of adventure, history and culture, as well as holistic and wellness themes, and the website is informative and describes the tours well and has lots of inspirational images. The operator has registered with the [World Travel and Tourism Council's Safe Travels](#) scheme that shows its commitment to a range of robust health and safety protocols to keep their customers safe.

## Thailand

[Siam Luxe](#) is an experiential tour operator that offers excursions, package tours and group tours. Its homepage scrolls through a selection of 3-second videos automatically, which is a good way of conveying images of the country. The operator promotes culture and nature and community-based experiences that are sustainable and encourage a healthy body and mind through food, wellness and meditation.

Its experiential wellness tour is a 19-day tour through Thailand and Myanmar that includes a range of community-based activities such as a homestay, a 2-night meditation retreat with a Buddhist monk and a wide range of experiential and wellness activities.

## Turkey

[Daily Istanbul Tours](#) offers a wide range of trips and excursions all over Turkey, including day tours and multi-day tours that include wellness products. The operator makes good use of Tripadvisor rating (4.9) which is featured very prominently on its homepage. As well as private tours, it also conducts group tours with small numbers of people, and they feature a comprehensive listing of FAQs (frequently asked questions) on the website.

### Tips:

Analyse the different efforts these companies are making to see what you can adapt for your business and website.

Do your own research of wellness tourism operators in your destination. Be sure to include operators that offer trips, retreats/resorts that provide treatments (you should find out if they welcome day visitors too) and inbound tour operators.

Make contact with your tourist board and/or DMOs (Destination Management Organisations) to see if you can work with them.

## Which products are you competing with?

Wellness is closely linked with adventure tourism and nature and ecotourism, as they are all segments that have a beneficial effect on a person's wellbeing. When planning a holiday, secondary wellness tourists will book a variety of activities based on what interests them and what fits into their itinerary – and their trip may encompass many niches including an element of wellness.

Primary wellness tourists will be seeking specific wellness retreats and resorts that offer what they are looking for and therefore the major competition will be within the sector.

### Tip:

Research how wellness operators in your destination combine wellness activities with adventure and/or nature activities to create attractive and tempting tourism packages.

## 4. What are the prices for wellness tourism products on the European market?

Prices for wellness tourism products are made up of several different elements. These will include, but not be limited to, travel to the destination, accommodation, activity provision, salaries of qualified practitioners, vehicle hire (if necessary), products, hire of premises, food and other elements that are appropriate or necessary for the trip.

It is important that you set your prices at the right level – this blog, [5 things to consider when costing and pricing a tour](#), highlights the importance of not setting your prices too high – meaning you'll get no sales – or too low – meaning you'll go out of business.

The table below indicates there is a huge variation of pricing between wellness tourism experiences. All prices quoted exclude international airfares.

Table 3: Prices for Wellness Experiences, Trips and Holidays, May 2022

Trip Description	Location	Duration	Cost from pp (€)
<i>Day/Part Day Experience</i>			



Turkish Bath and Spa	Turkey	2 hours	17.80
Essence of Munnar - yoga, healthy eating, Ayurvedic treatment	India	1 day	34.50
Monk Chat Meditation Retreat on Waterfall Temple, Chiang Mai	Thailand	4 hours	51.00
Spiritual and Stillness Trip	Bali	3 hours	62.50
Spa and Wellness in Kolkata	India	2 hours	63.10
La Fortuna Waterfall and Chocolate Tour	Costa Rica	1 day	92.00
Hiking and Yoga on the Xitle Volcano	Mexico	1 day	96.00
Wellness, Spa and Hot Springs at Wareerak, Krabi	Thailand	6 hours	117.50
Yoga and Balinese Healing	Bali	6 hours	135.20
Combo Tour - Zip lining, Waterfalls, Volcano and Hot Springs	Costa Rica	1 day	160.00
Pamukkale and Hierapolis	Turkey	8 hours	237.70
<i>Multi-Day Experiences</i>			
Yoga and Surf Package	Bali	4 days	312.00
Yoga and Meditation Retreat in Chiang Mai	Thailand	3 days	348.00
Yoga Holiday Staying in Bamboo Bungalows with Private Gardens	Bali	7 days	521.00
Wellness Retreat in Rishikesh	India	6 days	679.00
Wellness Trip	Thailand	2 days	706.50
Pamukkale Thermal Springs, Ephesus and Cappadocia	Turkey	4 days	815.60
The Zen Escape	Costa Rica	7 days	898.00

Wellness Costa Rica	Costa Rica	7 days	977.00
Yoga in the Himalayas	India	5 days	982.00
Relaxing & Reviving Yoga Retreat	Turkey	6 days	1,553.00
Holiday at the Rancho La Puerta	Mexico	8 days	4,577.00

Source: Acorn Tourism Consulting (internet research)

### Tips:

Research the competing offers and prices in your own destination so you have the relevant knowledge to hand when setting your own prices.

Consult these [Tips to find the right price for your tours](#).

This study was carried out on behalf of CBI by [Acorn Tourism Consulting Limited](#).

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