



Insight Department: Exploring the role of wellness in the visitor experience

Topic Paper: April 2019

Welcome

Complete physical, mental and social wellbeing

Wellness is an increasingly familiar term today and we are constantly reminded of the need for wellness in our lives through social and mainstream media. But what does ‘wellness’ actually mean? According to the World Health Organisation, health or ‘wellness’ is ‘a state of complete physical, mental and social wellbeing, and not merely the absence of disease or infirmity¹’.

Wellness is not a new concept, but it’s certainly a growing one. You only need to look around at the fitness trackers, health foods (even healthy fast foods!) and apps on offer, helping us to monitor everything from heart rate and cholesterol levels to calorific intake. And it’s not just physical wellbeing that’s being pushed at consumers, the market for mental wellness products is on the rise too judging by the profusion of meditation, mindfulness and headspace apps now available. From yoga classes to digital detox retreats, today’s focus is on encouraging us to assess our own wellbeing and take positive steps towards living healthier lives.

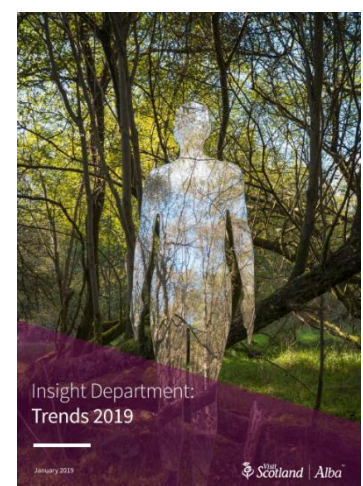
50% of people recognise that they need to do more to look after their health and wellbeing.

From luxury to necessity

As consumers, we are increasingly aware of the importance of maintaining a healthy lifestyle – mentally and physically – and the drive to address this is increasing. An ageing population and greater awareness of health issues in the western world can certainly be cited as influencing factors with more and more people recognising that wellness is a core driver for their quality of life now, and for a longer and healthier life in later years. As a result, products and activities associated with wellness are now perceived as less of a luxury and more a necessity of everyday life. This is something that the tourism industry is capitalising on.

The purpose of this Topic Paper is to highlight the latest insights regarding wellness, collated from a range of sources, and explore how these can influence Scotland’s tourism offer.

We recommend that this Topic Paper is read in conjunction with our [Trends Paper on Wellness](#), published in January 2019.



¹World Health Organisation, 1944

A snapshot of our nation’s approach to wellness

Research carried out in March 2018 indicates that although half us know we need to do more to look after our health and wellbeing, only around a third of us take positive steps to address both our mental and our physical health.

Which, if any, of the following statements describes how you feel about your health and wellbeing?

<i>I know I need to do more to look after my health and wellbeing</i>	50%
<i>I take steps to look after my mental health</i>	32%
<i>I look after my body by being physically active</i>	31%
<i>I don't feel I have time to think properly about my health and wellbeing</i>	13%
<i>None of these</i>	8%
<i>Don't know</i>	3%

Base: YouGov wellness survey - all GB adults (2,019)



And relax...

What do we do when we want to relax? According to our research, most people choose readily accessible activities such as watching TV, listening to music or reading. Getting out and about in the fresh air is also a popular choice as is enjoying eating and drinking or socialising with friends. But planned physical exercise, such as going to the gym or playing sport, is much lower down the list. Taking a break from technology is identified as a way of relaxing which is an interesting reflection on how stressful constant connectivity can be. Only 10% of those surveyed actively seek meditation or mindfulness to aid relaxation.

Which, if any, of the following do you do to relax?

<i>Watch TV/films</i>	78%
<i>Listen to music or read</i>	75%
<i>Go for a walk/go outside</i>	67%
<i>Enjoy food/drink</i>	58%
<i>Socialise with family/friends</i>	58%
<i>Exercise (eg. go to the gym)</i>	28%
<i>Take a break from technology (e.g. turn off the phone)</i>	15%
<i>Go for treatments (eg. massage, facial)</i>	12%
<i>Mediate/practice mindfulness</i>	10%
<i>Play sport (eg. football, golf)</i>	8%

Base: YouGov wellness survey - all GB adults (2,019)

Combining wellness in the tourism offer

How does the concept of wellness affect the way we choose our holidays? Wellness tourism* is a globally expanding proposition with many destinations tapping into the wellness trend by marketing themselves specifically as ‘wellness destinations’. This can range from promoting dedicated spa resorts or yoga retreats to holidays that simply include opportunities for massage, detox, yoga or mindfulness classes as a bolt-on offer. Either way, this gives tourists the opportunity to actively seek ‘wellness holidays’ which, for the purpose of our research, we’ve defined as ‘holidays/short breaks taken with the sole purpose of enhancing physical, mental and social wellbeing’.

Our research identified that 57% of those surveyed take a holiday at least once a year and 66% take a short break (1 – 6 nights) at least once a year. 62% of those surveyed also took their holiday or short break in the UK in the last year. It could be reasonably argued that a holiday is, in itself, key to looking after our individual wellness but the main reasons cited for taking a holiday or short break in the UK are to spend quality time with family/friends (52%), for a change in scenery (34%) and to switch off from everyday life (33%).

76% of people surveyed have never been on a wellness holiday and 26% claimed that they’d never heard of a wellness holiday.

The appeal of wellness tourism

The idea of switching off to recharge our physical and emotional batteries lies at the heart of wellness yet 76% of people surveyed stated they had never been on a wellness holiday stating that they go on holiday for other reasons (35%), that wellness holidays are perceived to be too expensive (35%) or, simply, that they haven’t heard of wellness holidays (26%).

42% of people surveyed found the concept of a wellness holiday appealing.

What makes the concept of wellness tourism (and therefore wellness holidays) particularly interesting – and indeed challenging – is that ‘wellness’ has different connotations for different people. For some, a yoga retreat is their idea of heaven while for others wellness might be a factor in a holiday spent climbing mountains, taking part in physical activities or experiencing the great outdoors. This is reflected in the notions of primary and secondary wellness tourists within the tourism industry – for ‘primary wellness’, wellness is the main purpose of the holiday while for ‘secondary wellness’, wellness is an added extra rather than the main purpose. The latter categorisation accounts for around 90% of wellness tourism.

*Wellness tourism should not be confused with medical tourism where visitors travel abroad for specific medical treatments.

Exploring perceptions of wellness holidays

When asked what activities and characteristics most people associated with wellness holidays, the majority of our respondents (43%) cited yoga, meditation and mindfulness – perhaps to be expected as these activities have the most obvious ‘wellness’ connotations. Experiencing the fresh air and being outdoors came in at 42% while finding peace and quiet came in at 41% - both, perhaps surprisingly, higher than visiting a spa which scored only 35%.

Active walking, cycling, jogging or other physical exercises, particularly if these are carried out in the natural environment, are increasingly combined with wellness tourism and are particularly popular among 50 – 65 year olds.

European CBI: Wellness Tourism from Europe



However, breaking our research down further, by attitudes to health and wellbeing, clearly reflects that those who look after themselves physically are more likely to choose wellness options which focus on outdoor activities while those more concerned with their mental health seek out opportunities for peace and quiet (47%) or meditation (47%). For those who don't have time to think about their health and wellbeing, there was a strong bias towards ‘time out’ approaches to wellness through spas (43%) and alone time (22%).

Wellness Opportunities		Attitudes to health and wellbeing			
		I look after my body by being physically active	I take steps to look after my mental health	I know I need to do more to look after my health and wellbeing	I don't feel like I have time to think properly about my health and wellbeing
Yoga/meditation/mindfulness	43%	44%	47%	48%	44%
Fresh air and the outdoors	42%	47%	44%	44%	39%
Peace and quiet	41%	39%	47%	44%	39%
Healthy eating (eg. particular diets)	35%	37%	35%	39%	28%
Spas	35%	36%	35%	37%	43%
Active outdoor activities (eg. walks)	25%	34%	25%	25%	26%
Alone time	14%	12%	14%	15%	22%
Food and drink (eg. eating out)	11%	11%	11%	10%	14%
Culture (eg. historical tours)	8%	9%	10%	9%	8%
Don't know	6%	3%	4%	3%	3%
None of these	4%	3%	3%	3%	3%

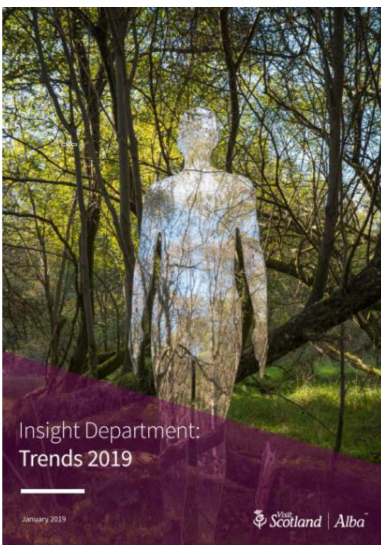
Base: YouGov wellness survey - all GB adults (2,019)

Although not indicated in the table above, breaking down responses by gender revealed further divisions in perception with female wellness tourists more drawn to meditation (51%) and spas (41%) and male wellness tourists more likely to favour fresh air and the outdoors (42%) or alone time (16%).

Positioning Scotland as a wellness destination

Scotland offers an abundance of wellness opportunities. Our vast, natural landscape with breath-taking scenery coupled with our world-class cultural attractions offer a wealth of ways to feed the body, mind and soul.

A recent European Union report highlighted Scotland as one of the quietest destinations in Europe. In a world full of noise and technology, Scotland offers an escape to nature in less than an hour from all of our major towns and cities. Scotland also enjoys a low level of light pollution, creating some of the darkest skies in Europe against which – on a clear night – constellations of stars are clearly visible.



The [VisitScotland Trends Paper on Wellness](#), published in January 2019, highlights three overarching trends in tourism that support wellness as a key driver in our tourism offer.

The Art of Now embraces enrichment and personal growth through self-development on holiday or through an appreciation of culture and heritage found in a chosen destination.

Sensory Tourism focuses on immersing visitors in their holiday environment with both urban and rural destinations contributing to a deeply personal experience through tangible sensations.

New Society Norms answers our increasing search for meaningful life experiences, which travel can play a significant part in providing.



Appealing to wellness seekers

Although Scotland may not be top of mind as a wellness destination, we have real potential to take advantage of the wellness tourism market. With plenty of outdoor scenery and walks, peaceful rural areas and coastal retreats, rewarding cultural hubs in our towns and cities, authentic food and drink experiences and an existing range of spa resorts and activity centres, Scotland has the opportunity to appeal to the widest range of wellness seekers. The majority of our visitors may not consider a holiday in Scotland where wellness is the main driver, but are likely to take part in wellness activities as part of the time spent with us.

On average, international wellness tourists spent 53% more per trip than the typical international tourist. The premium for domestic wellness tourists is even higher at 178% more than your average domestic tourist.

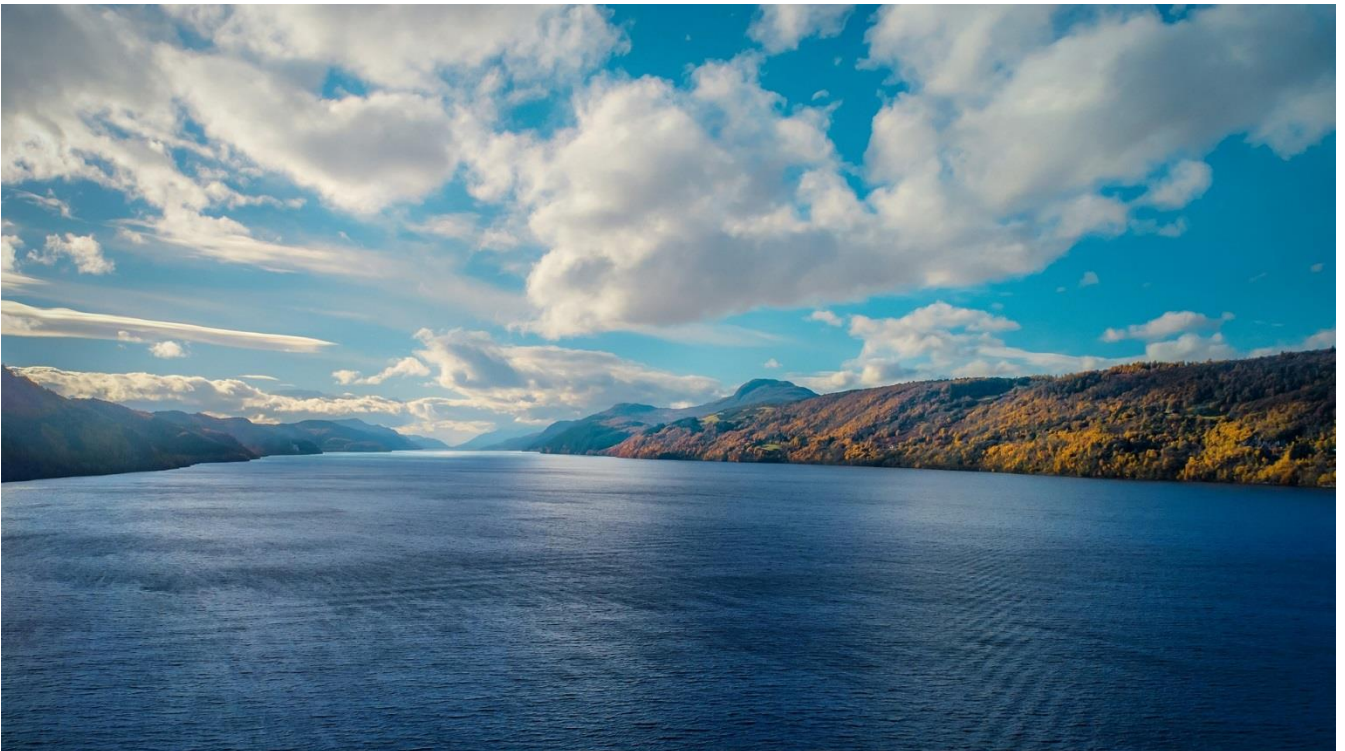
The Global Wellness Institute (GWI) 2017

32% of people surveyed agreed that Scotland is an ideal destination for a wellness holiday rising to **47%** from those who had previously taken a wellness holiday

10% of people surveyed are likely to visit Scotland for a wellness holiday in the next two years, rising to **15%** among those who look after themselves by being physically active

18-24 year olds who were likely to visit Scotland in the future were the most likely (**55%**) to agree that Scotland is an ideal wellness destination

Source: YouGov wellness survey- all GB adults (2,019)



Sources and their interpretation

The following sources were used in the development of this Topic Paper:

World Health Organisation

<https://www.who.int/about/who-we-are/constitution>

CBI Product Factsheet: Wellness Tourism from Europe

https://www.cbi.eu/sites/default/files/market_information/researches/product-factsheet-europe-wellness-tourism-2015.pdf

Global Wellness Day

<https://www.globalwellnessday.org/about/what-is-wellness/>

Self: The Big, Booming Business of Wellness

<https://www.self.com/story/the-big-booming-business-of-wellness>

Global Wellness Summit: A New Era of Transformative Wellness Travel

<https://www.globalwellnesssummit.com/2018-global-wellness-trends/transformative-wellness-travel/>

European Environment Agency – Mapping Europe’s Quiet Areas

<https://www.eea.europa.eu/highlights/mapping-europe2019s-quiet-areas>

And the following primary research and interpretation applied:

VisitScotland YouGov Omnibus 2018

This survey was conducted by YouGov, on behalf of VisitScotland, to investigate attitudes and behaviours surrounding health and wellbeing. The survey also investigated perceptions around wellness and wellness holidays.

Fieldwork was undertaken between 7 and 8 March 2018. The survey questions were asked of a nationally representative sample of n=2,019 UK adults aged 18+ and the survey was carried out online.

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Front Cover: Climber on the summit of Ben A'an in the Trossachs (Kenny Lam)
Page 5: Cyclists passing Lion Rock, Great Cumbrae, Ayrshire (Kenny Lam)
Page 6: Outdoor Spa Pool at the Gleneagles Hotel, Auchterarder, Perth & Kinross (Paul Tomkins)
Page 7: Loch Ness, Scotland (Stuart Brunton)
Back Cover: Windsurfing on Loch Bee, Isle of South Uist, Outer Hebrides (Paul Tomkins)

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