

destinations : wellbeing tourism



RESOURCE 1

HOW REGIONS CAN EXPLOIT THE

**THE WELLBEING  
TOURISM MEGATREND**





Wellbeing tourism  
is a megatrend when managed  
can benefit **regions social and  
economic interconnectedness,  
public and private debt,  
sustainability, environmental  
sustainability, economic  
prosperity, and social wellbeing.**

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## 01

Introduction to the  
DETOUR Resource 1Introduction  
to DETOUR  
Resource 1

It has the potential to **unlock social and economic opportunities**, managing infrastructure and natural resources as **'over-tourism'** continues to be a challenge for many popular destinations.



Wellness tourism' is the  
**fastest-growing** travel sector

Lonely Planet Jan 2018

To keep on top of the wellness trend European businesses, regions and governments are increasingly looking at **wellness tourism to diversify their tourism sector**, carve out a unique niche, reduce seasonality and bring more benefits to their local communities and small businesses. This resource begins with an overview of wellbeing tourism, defines it as a sector, then defines the wellbeing tourist, explains how medical tourism is not wellbeing tourism, then explains how it is part of the growing wellness economy, and as a megatrend it is transforming tourism.

Megatrends need to be monitored and considered, they can often bring new and unseen challenges, threats, and opportunities, the impacts of which can affect the economies, regions, and the tourism sector as a whole. In the main section (Section 5) we look at different opportunities how European businesses, regions, and governments can innovatively consider, plan, develop, and successfully exploit this sustainable megatrend.

The case studies included in this resource focus on different contexts such as how regions can adapt, diversify, differentiate, develop their own regional opportunities, and navigate through different wellbeing tourism challenges in their regions.



## 02

## Introduction to Wellbeing Tourism – A Future Megatrend



### Wellbeing Tourism - Setting the Scene

Wellness tourism, a global phenomenon of the 21st century, has become **imperative for the successful development of health tourism destinations**.

Millions of tourists travel to destinations all over the world every day, with one goal - to preserve and improve their mental and physical health.

The tourism market is characterised by intensive changes, so the task of the health tourism destinations' management is to follow those changes vigilantly, to be able to adjust their offer to the current trends. In that way, the creation of an integral health tourism product is achieved, which will meet the needs of contemporary customers, who are becoming more demanding and sophisticated. Wellness tourism is important in the contemporary offer of health tourism destinations. *(Reference: Wellness Tourism – Competitive Basis of European Health Tourism Destination)*

Wellness has become a way of living for most of us and many of us wish to extend this type of living to our holidays and explore new ways to enhance our wellness and wellbeing; this includes mental health and physical relaxation, finding inner peace, having a healthy body and spirit and destressing. Therefore, well-being tourism destinations and opportunities are on the rise to attend to these ever-growing demanding markets.

Wellness tourism is an undeniable emerging tourism sector with evident global scale and far-reaching economic impacts. Most importantly the awareness and demand for **wellness tourism** have **risen dramatically particularly in recent Covid-19 events**.

“

*Hardly mentioned as a tourism category just five years ago, wellness tourism is now recognized as one of the fastest-growing tourism niches, with promises to expand the overall tourism 'pie' while mitigating some of the challenges facing many destinations combating mass tourism and seasonal fluctuations'*

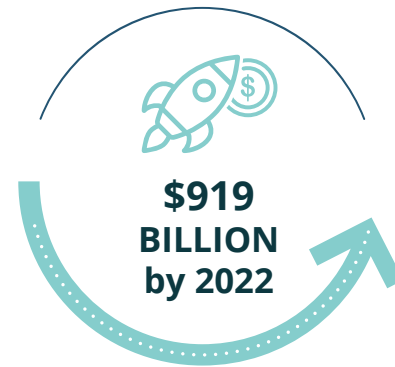
*(Global Wellness Institute Report)*



The **global wellness tourism industry** is now valued at...



and this forecast will rocket to....



## Tourists are increasingly incorporating more and more **wellness** into their holidays...

The **act of travel** itself is considered or consumed as a **wellness enhancing activity**. People are focusing more and more on their **physical and mental health** and often return from holidays feeling like they need another holiday.

After spending a week consumed with crowds, delays, unhealthy food, and alcohol, poor sleep, doing too much, sun exposure...the list goes on! More and more tourists are reverting to rejuvenation and healing because they no longer want to feel tired, stressed, and exhausted coming home from their holidays.

We are hearing how our friends and family who have experienced a wellness vacation come home feeling 'rejuvenated', 'relaxed', and 'refreshed'.

**Destination** uniqueness and maximizing the opportunities offered are key!



Wellness Travel Improves Rather Than Harms Your Health

### Unwell Travel

- Unhealthy & over-eating
- Travel Stress
- Excessive drinking
- Poor sleeping
- Disruption of fitness routine

### Wellness Travel

- Rest & rejuvenation
- Disease prevention & management
- Extend & discover healthy lifestyles
- Authentic & transformative experiences
- Meaning, connection, & joy

Source: Global Wellness Institute



## 03

Wellbeing Tourism  
& Wellbeing Tourists  
Defined

Wellness Tourism is **not just about where people visit and what they do. It incorporates their lifestyle and values with sustainability often being a core value.**

They have catalysed many sectors with their preferences in organic and local foods, yoga and meditation, recycling, and fresh clean air. Our increasingly sedentary lives include unhealthy eating, digitized living, stressful lifestyles, mental health, disease lead us to not feeling 'well'. The results are we are incorporating more and more elements of health awareness, self actualisation, mindfulness, nourishing our bodies, prevention rather than cure measures, and physical exercise into our everyday lives. We want to destress, relax, exercise outdoors more, get away from our work environments, and feel good. We want to continue feeling this way when we are away from home.



If you can provide a consumer with a **return to nature**, renewed awareness of the environment, the rediscovery of local identity, and the search for both physical and psychological wellbeing you most likely can join the wellbeing tourism megatrend.

Wellness Tourism fits the need to help tourists to maintain and improve how they rest, relax, rejuvenate, discover, feel peace and joy, and self-actualization – important elements to living well. It is important to note that wellness tourism is not just about spas, yoga retreats, and luxury resorts it can be incorporated into most businesses and destinations once they have the right wellness elements.



If you (like many people) are into **self-care** you are most likely considering some kind of wellness for your next holiday

think sunrise yoga, plant-based feasts, peace and quiet, culture, food and wine, morning hikes, detoxing massages, breathwork, and mediation around the pool while the sun dazzles on the water and beautiful landscapes surround you in the background. Also think surfing, spiritual retreats, idyllic locations, panoramic mountain views, holistic treatments, walking barefooted on the beach, paddle boarding on a glacial lake, detoxing, cooking classes, sport, and fitness...the list is endless.





Health in its basic constitution is a **state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity.** Well-being is a multidimensional state of being describing the existence of positive health of body, mind, and soul. Health and wellness include physical, mental, social, sexual, emotional, cultural, spiritual, educational, occupational, financial, ethical and existential dimensions.

World Health Organisation

**Wellness tourism is multidimensional – includes physical, mental, social, emotional, spiritual, and environmental aspects – it is also multifaceted.**

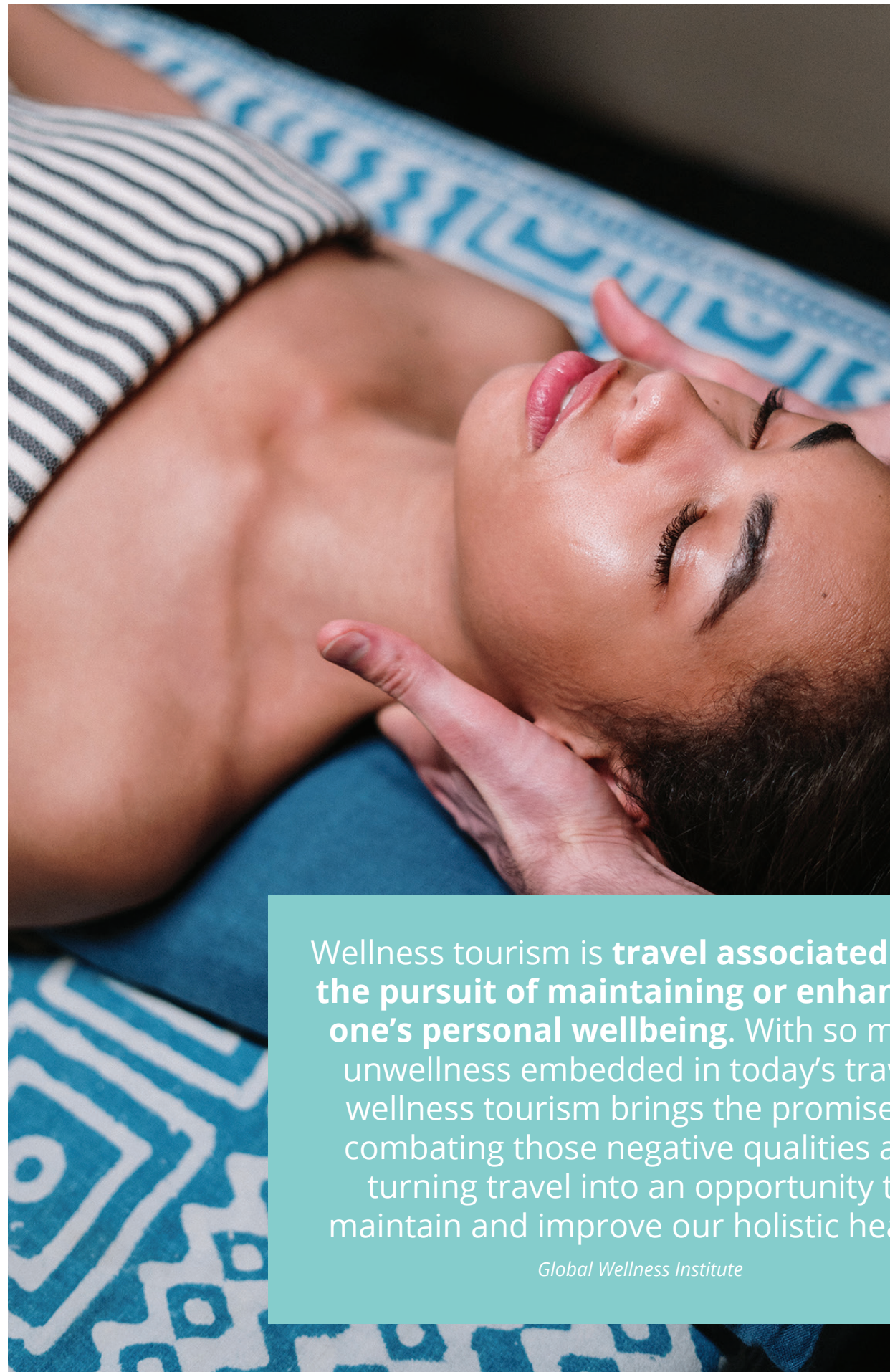
It encompasses a large and diverse set of activities and pursuits, including preventive health services, spa, beauty, fitness, personal growth, nature, and much more. Well-being tourists have a specific set of needs and holistic values that involve a certain set of activities and choices. *Global Wellness Tourism Economy (2018)* identified the key values, activities, and choices that drive wellness travelers taking into consideration what they want to seek, do, and visit.

## Holistic Values Drive Activities & Choices of Wellness Travellers



Source: Global Wellness Institute





Wellness tourism is **travel associated with the pursuit of maintaining or enhancing one's personal wellbeing**. With so much unwellness embedded in today's travel, wellness tourism brings the promise of combating those negative qualities and turning travel into an opportunity to maintain and improve our holistic health.

*Global Wellness Institute*

## Wellbeing Tourism - Academic Research Definitions

**There is no consensus around a single definition of Wellbeing Tourism.** In this section, we have researched some definitions from a range of industry experts and academics of what Wellness Tourism is.



Well-being is not only composed of cognitive components, such as happiness, but also experiences.

Not only due to these circumstances but also due to new market trends and lifestyles, wellbeing tourism presents enormous potential for new business opportunities

*(Grénman & Räikkönen, 2015; Smith & Diekmann, 2017) (Grénman & Räikkönen, 2015). Holm et al. (2017), Diener (1994)*



Wellbeing Tourism refers to the balance of **physical, mental, and social wellbeing**, and focus on enhancing and maintaining health and wellbeing.

Well-being, however, is a wider concept and often associated with material and economic factors, e.g. the standard of living, subsistence, and education, but also with more subjective facets of quality of life, happiness, and life satisfaction. Wellness, in turn, is more personal in nature and refers to an individual's self-responsibility and healthy lifestyle. Furthermore, especially in tourism research, well-being is associated with active enjoyment, such as physical activity and professional training, whereas wellness is more about passive enjoyment and pampering through, e.g. spa and beauty treatments

*(Grénman and Räikkönen (2015)*



Wellbeing occurs when one experiences meaning and self-fulfilment in life while **hedonic wellbeing** arises from seeking happiness and pleasure.

This means that tourists looking for wellbeing tourism experiences nowadays may be increasingly granting more importance to long-term benefits, self-development, or even transformational opportunities, and not as much to immediate, short-term pleasure. More recently, a perspective has been presented, stating it is deeply related to sustainability issues

*(Smith & Diekmann, 2017), Pyke et al. (2016)*





**Wellness has been defined as a mishmash of the terms wellbeing and fitness** and it is often perceived as elite products, while wellbeing, apart from physical activity, could be about learning a new culture, developing a new skill, feeling part of the destination's landscape and/or connecting with people

Pyke et al. (2016)



Wellbeing tourism is connected to **subjective experiences**, at the individual level.

In some way, alienate people from their daily fast-paced living, granting them time to appreciate their surroundings and what they are doing.

*(Smith & Diekmann, 2017)*



Personal meaning seems to stand out as a critical feature in all this.

As the well-being experience should be contributing to self-development, personal growth, and life satisfaction. This is even more clear when considering the widespread emergence of healthier lifestyles

*(Global Wellness Institute, 2018; Grénman & Räikkönen, 2015; Pyke et al., 2016)*

and post Covid-19 concerns about the quality of life and personal satisfaction

*(Yeung & Johnston, 2020)*



Wellness tourism includes consumers who travel to maintain their well-being and life satisfaction through the **experiences of health treatments**. Wellness has to do with the quality of life.

It is a holistic approach to health (Chinese ayurvedic and integrative medicines) wellness treatments and therapies restore the vital balance among body mind and spirit toward equilibrium and health harmony. This harmony re-balances and restores the energy flow bringing about overall well-being.

*(www.medicaltourism.com)*





**Wellbeing tourism is the fastest-growing sector.** Health tourism (which includes wellness/wellbeing tourism) today makes up about 5% of the tourism industry in the EU28 and has a higher domestic share than traditional tourism does. Wellbeing tourism makes up 66-75% of EU health tourism

Lonely Planet

## The Difference between Wellness Tourism and Medical Tourism

**Wellness Tourism is Not Medical Tourism!** Medical tourists travel abroad to receive more affordable medical surgeries or treatments and look for higher quality standards or better access to care in comparison to what they could get in their home country.

Those traveling for wellness, on the other hand, seek activities that maintain or enhance their health and wellbeing. In this case, their main motivators usually are unique, location-based experiences or therapies that are not available in their home country.

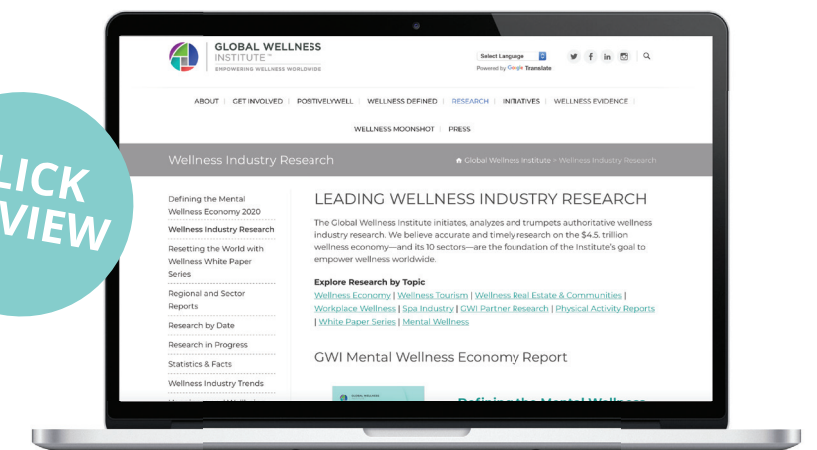
**For example,** medical tourism involves people who travel for surgeries and dental care, while wellness tourism involves travelers seeking to try out SPA treatments and rituals, balanced diet seminars, and fitness events.



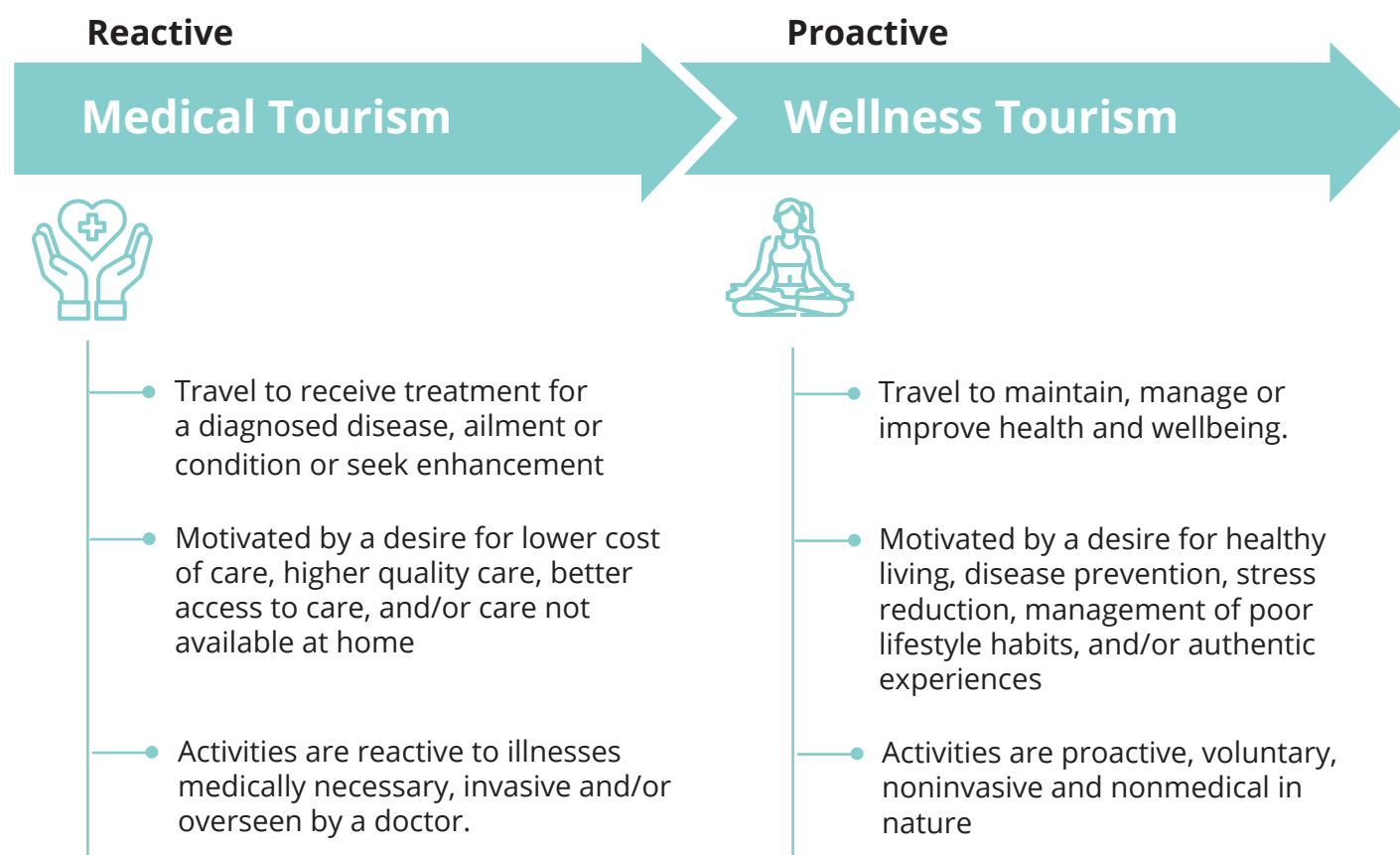
According to the **Global Wellness Institute**

*'wellnesstourism is often conflated with medical tourism—not only by consumers but in destination marketing. This confusion is caused by an incomplete understanding of these markets and inconsistent usage of terminologies by destinations, government organizations, and promotion agencies. Sometimes the term “health tourism” is also used as a catch-all to describe many types of medical and wellness services and activities—from open-heart surgery and dental care to destination spas and yoga retreats—causing further confusion. In fact, these two sectors operate largely in separate domains and meet different consumer needs’.*

CLICK TO VIEW







Source: Global Wellness Institute

## A good way to understand the difference is to look at **our health and wellbeing on a continuum:**

**On the left are poor health, injury, and illness** the medical paradigm treats these conditions. Medical tourism falls on this side—for example traveling to another place to receive surgery or dental treatment because it is more affordable, higher quality, or not available at home.

**On the right side of the continuum is wellness** these are the proactive things we do to maintain a healthy lifestyle, reduce stress, prevent disease, and enhance our wellbeing. This is what motivates wellness tourism.

There is some overlap between **medical tourism and wellness tourism** - for example, DNA testing or executive checkups.

But in general, the types of visitors, activities, services, businesses, and regulations involved are very different between medical tourism and wellness tourism, even though they may share a dependence on a region's basic tourism and hospitality infrastructure and amenities.

That doesn't mean that wellbeing destinations and regions can't engage in exploiting opportunities to provide both 'wellness' and 'medical' tourism to both groups of tourists. As they are closely related, both groups of tourists often seek out a combination of both wellness treatments and medical treatments, this can give regions a compelling competitive advantage and unique selling point. Holistic wellness and medical treatment often can go hand in hand. The table below indicates how both the 'wellness' and 'medical' tourism sectors and regions can facilitate the needs of both groups of tourists.

Wellness Tourism is purpose-driven travel to **improve well-being in mind, body or spirit**; encompassing discovery, connectivity, transformation, and fulfillment by promoting positive engagement between people, cultures & nature.

Wellness Tourism Worldwide's definition of wellness tourism







Medical Tourism	Activities & Experiences	Eg. of Businesses Involved
<b>Health Care &amp; Overall Physical Wellbeing</b>	<ul style="list-style-type: none"> <li>• <b>Preventative &amp; personalized</b> medicine, public health and health check-ups</li> <li>• <b>Complementary and alternative</b> medicine, integrative medicine diagnostics, natural and alternative products</li> <li>• <b>Healing &amp; rehabilitation</b> healing, acupuncture, surgery/operations, dentistry, healthy mineral bathing, chronic condition management</li> <li>• <b>Cosmetic Surgery</b> breast augmentation, facial contouring, facelifts, tummy tuck, liposuction</li> </ul>	<ul style="list-style-type: none"> <li>• Integrative health centers and retreats</li> <li>• Complementary and Alternative Medical (CAM) centers or retreats</li> <li>• Wellness centers and retreats</li> <li>• Hospitals and surgical centers</li> <li>• Lagoons, geothermal baths, saunas, salt caves specific to healing e.g. skin conditions such as psoriasis</li> </ul>



Wellness Tourism	Activities & Experiences	Eg. of Businesses Involved
<b>Nutrition and Alternative Healthy Eating</b>	<ul style="list-style-type: none"> <li>• Healthy eating, nutrition</li> <li>• Weight loss, detox programs</li> <li>• Culinary cooking experiences, vegan/raw or vegetarian</li> <li>• Programs e.g. juicing, vegan or raw</li> </ul>	<ul style="list-style-type: none"> <li>• Organic and natural restaurants</li> <li>• Health food stores</li> <li>• Wellbeing culinary and food resorts or retreats</li> <li>• Organic and local farming produce, farm gate</li> </ul>
<b>Eco, Adventure, and Leisure Activities</b>	<ul style="list-style-type: none"> <li>• Engaging with nature, forests, beaches, coastal, mountains, lakes, foraging, etc.</li> <li>• Fitness in mind and body</li> <li>• Wellness and lifestyle in nature</li> <li>• Sports, fitness classes, Pilates</li> <li>• Natural energy healing</li> <li>• Mountaineering, hiking, kayaking, surfing, SUP stand up paddle boarding, canoeing, paragliding, walking, biking, nature visits... the list is endless</li> <li>• Slow tourism and slow adventure tourism and activities</li> </ul>	<ul style="list-style-type: none"> <li>• Gyms, fitness centers</li> <li>• Adventure and leisure festivals and activity or leisure specific events</li> <li>• National parks, local parks, wildlife sanctuaries</li> <li>• Trails, nature preserves, natural resources, and natural iconic attractions</li> <li>• Slow adventure tourism experiences; kayaking, walking, cycling, foraging...</li> <li>• Immersive nature accommodation experiences e.g. Yurts, Glamping, Tree Houses, sea and coastal huts/ houses</li> </ul>

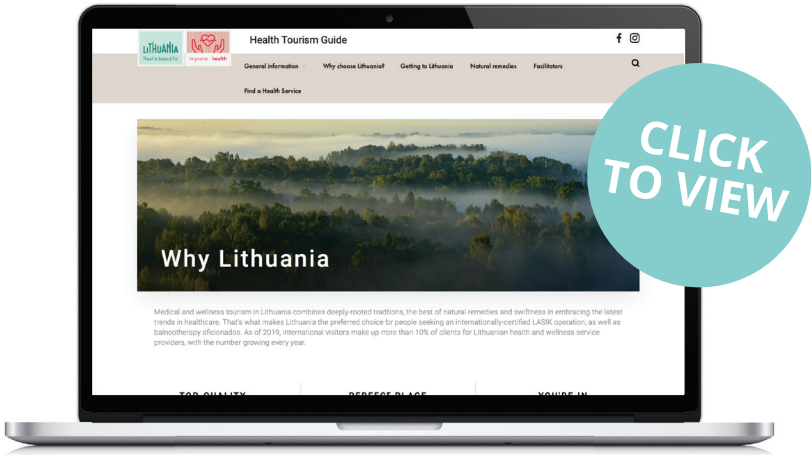




Wellness Tourism	Activities & Experiences	Eg. of Businesses Involved
Physical and Cosmetic Beauty, Relaxation, Rejuvenation and Revitalise	<ul style="list-style-type: none"><li>Alternative beauty and relaxation treatments</li><li>Spas, beauty treatments, pampering, massage, bathing, facials, hair, nails</li><li>Noninvasive non-surgical cosmetic treatments e.g. Botox, skin peels, laser treatments</li><li>Beauty, relaxation, and anti-ageing products, experiences, and services...</li></ul>	<ul style="list-style-type: none"><li>Healthy hotels, spas, salons, baths, springs, wellness cruises, health resorts....</li><li>Lagoons, mineral springs, geothermal baths, saunas, salt caves related to beauty, rejuvenation, and relaxation (<i>the difference here from medical is they are not for healing conditions but for wellbeing experiences</i>)</li></ul>
Holistic Wellness and Wellbeing <ul style="list-style-type: none"><li>Personal Growth</li><li>Spiritual &amp; Connection</li><li>Mind-Body Focus</li><li>Mental Wellbeing</li><li>Life/work balance</li><li>Entertainment and social wellness</li></ul>	<ul style="list-style-type: none"><li>Spiritual, yoga, meditation, new age activities, Qigong, biofeedback, prayer, volunteering, time alone, personal growth, life coaching, stress reduction techniques, music, and the arts....</li></ul>	<ul style="list-style-type: none"><li>Tai Chi, yoga studios, martial arts studios</li><li>Yoga retreats, spiritual retreats, lifestyle retreats, wellness retreats, occupational wellness workshops, holistic centers</li><li>Pilgrimages, Ashrams (spiritual yoga place),</li><li>Remote wellness working and living</li></ul>

Health Tourism Lithuania offers services for both groups of tourists, as well as those who seek a combination of medical and wellness treatments

Medical tourists often choose plastic surgery clinics with excellent price-quality ratios in **Kaunas**, while those in search of wellness enjoy mineral water and natural mud procedures in the SPA town of **Birštonas**. Both towns are just 50 km apart, so it is especially convenient to go for rehabilitation to Birštonas after undergoing surgery in Kaunas.



‘Medical and wellness tourism in Lithuania combines deeply **rooted traditions, the best of natural remedies, and swiftness in embracing the latest trends in healthcare.** That is what makes Lithuania the preferred choice for people seeking an internationally certified LASIK operation, as well as balneotherapy aficionados. As of 2019, **international visitors** make up more than **10%** of clients for Lithuanian health and wellness service providers, with the number growing every year’

Health Tourism Lithuania



# Who are the Wellness Tourists or Travelers?

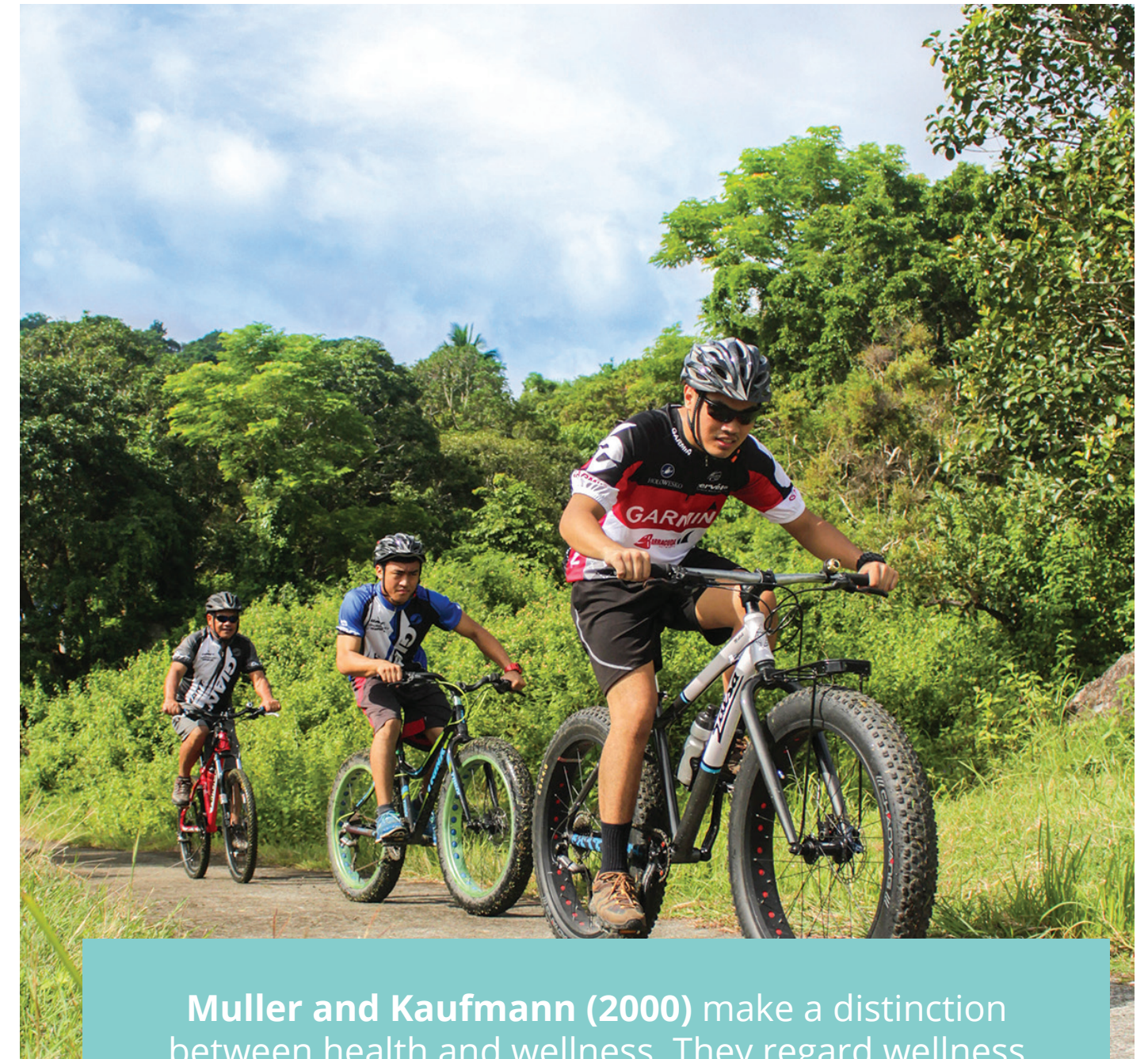
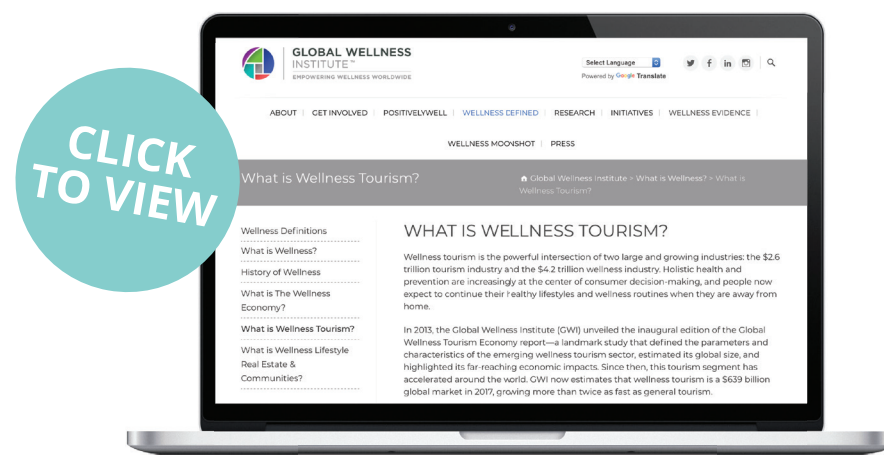
There is a common misconception that wellness travelers are a small, elite, and wealthy group of leisure tourists who visit destination spas, health resorts, or yoga and meditation retreats. Wellness travelers comprise a much broader and more diverse group of consumers with many motivations, interests, and values.

## GWl identifies two types of wellness travellers

**01 Primary wellness traveller** A traveller whose trip or destination choice is primarily motivated by wellness.

**02 Secondary wellness traveller** A traveller who seeks to maintain wellness while traveling or who participates in wellness experiences while taking any type of trip for leisure or business.

Importantly, primary and secondary wellness travel can be done by the same person on different trips, and these two types of wellness travel reinforce one another. Over time, some secondary wellness travellers will decide to take a primary wellness trip, as their interest in and experience with wellness grows. For example, a person who visits a day-use hot spring during a family vacation (secondary wellness travel) may later be motivated to plan a weekend getaway staying at a hot spring resort (primary wellness travel) [Global Wellness Institute](#)



**Muller and Kaufmann (2000)** make a distinction between health and wellness. They regard wellness tourism as a subset of health tourism. According to Dunn (1959), wellness is a “state of health, which comprises an overall sense of well-being and sees a person as consisting of body, mind, and spirit. Lifestyle and self-responsibility for health see paramount in the quest for a better quality of the life. In some countries like Germany, Austria, and Switzerland, there is a considerable emphasis on ‘medical wellness’.



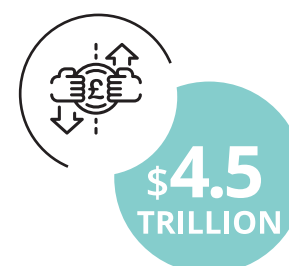
## 04

Wellbeing Tourism  
is a Megatrend

## The Global Wellness Revolution and Economy

The wellness revolution is largely being driven by consumers and their quest for healthier lifestyles and habits, some of which have been triggered by our inherent insecurities about our physical, and indeed mental, selves. But the revolution has also led to a wave of a new category and product innovation, new startups focusing on the wellness market as well as forcing brands to reorient their values to reflect those of customers. And this can only be a good thing for brands and consumers.

The Global Wellness Economy is Currently Valued At



(2018 Data).

The global wellness economy was worth a staggering



in 2017, according to a recent study of the market published by the *Global Wellness Institute (GWI)* which examined 10 sectors before arriving at this valuation.

The top of the list is the personal care, beauty, and anti-ageing market which was worth



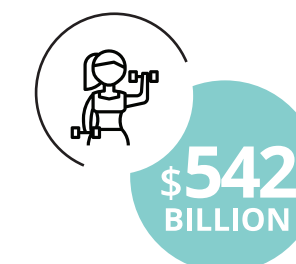
It was followed by the healthy eating and nutrition market which was worth another



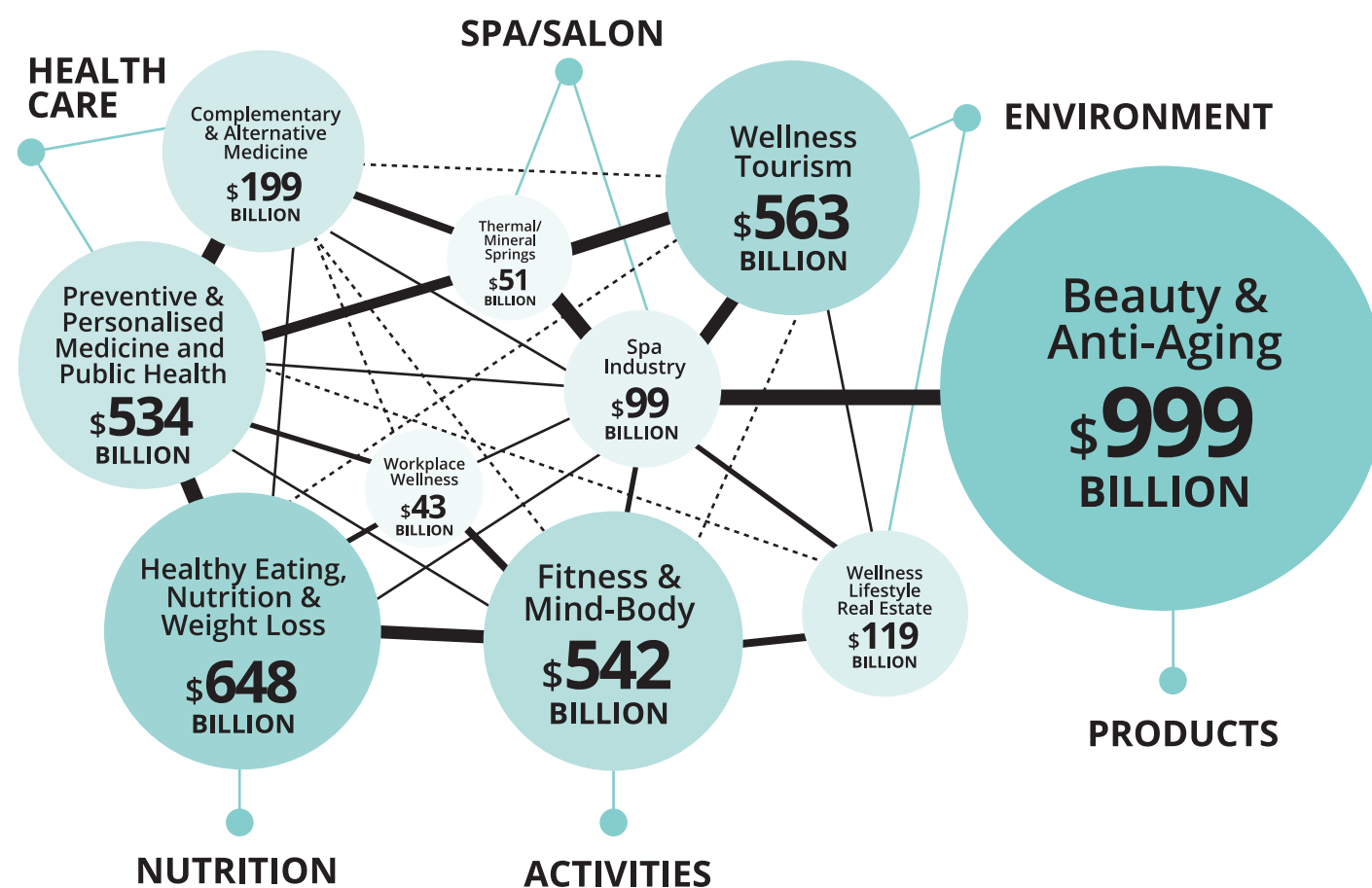
The growing wellness tourism market was worth another



while the fitness and mind-body market which was worth



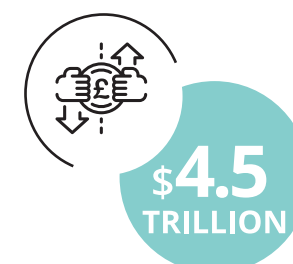




GWI Global Wellness Economy Monitor (released in October 2018, with data for 2017).



The global wellness economy is currently valued at



(2018 Data).

Wellness expenditures



are more than half as large as total global health expenditures



based on WHO data

The industry grew by 6.4 percent annually from 2015–2017, from a \$3.7 trillion to a



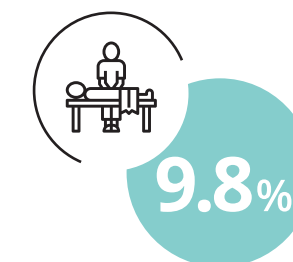
market, nearly twice as fast as global economic growth (3.6 percent annually, based on IMF data).

The wellness industry represents



of global economic output.

Among the 10 wellness markets analysed, revenue growth leaders from 2015–2017 (per annum) were the spa industry



wellness tourism



and wellness real estate



Other sectors include preventative and personalised medicine (\$543bn), traditional and complementary medicine (\$199bn), workplace wellness (\$43.3bn), and the spa and thermal springs sectors which, between them, were worth \$1.4bn. [\(Full article here\)](#)





## Ireland's Wellness Economy



Ireland

The wellness economy is highly evident in Ireland. According to a recent report by research firm Euromonitor, it is worth around **€2bn a year** and this is likely to **rise to around €2.3bn by 2020**.

The biggest chunk of this - €700m - was attributable to natural and healthy products while €685m was spent on functional and fortified foodstuffs.

While the global adventure travel market is estimated at €80bn, the sector's value to the Irish economy is valued at €850m and growing. And it is no longer aimed at only the very fit.



The ability to be in the present moment is a major component of mental wellness

Abraham Maslow

## Megatrends are Transforming Tourism

**A megatrend** is a shift in behaviour or attitude that has a global impact and is critical for companies seeking to drive sustainable growth and remain relevant as competition increases and new ideas disrupt entire industries. In the context of tourism, this trend is most closely related to evolving visitor demand, which refers to trends such as ageing populations and the growth of the global middle class

The future of tourism will be impacted by large-scale social, economic, political, environmental, and technological changes, bringing new and often unseen challenges, threats, and opportunities. Tourism "megatrends" are slow to form, but once they have taken root, exercise a profound and lasting influence on human activities, processes, and perceptions.

### Four megatrends that are likely to have significant impacts and relevance for tourism:

- 01 evolving visitor demand
- 02 sustainable tourism growth
- 03 enabling technologies
- 04 travel mobility

Exploring the multidimensional implications of these megatrends to 2040 is important to inform policy and shape the future of tourism. (OECDLibrary.org)





# Approaches to Responding to Megatrends

To assist with responding to megatrends, the **OECD has developed an approach** that focuses on four key categories



## People

Generally refers to changing demographics, as well as trends related to health, labour, and social cohesion.

**In the context of tourism, this includes;** evolving visitor demand, ageing populations, income, and education levels increase, new consumer groups, emerge.



## Planet

Generally refers to the state of the environment and the impacts of climate change, as well as access to resources such as food, energy, and water.

**In the context of tourism, this includes;** sustainable tourism growth, low impact developments, and natural resource management.



## Productivity

Generally refers to sources of growth, such as technology, innovation, and entrepreneurship.

**In the context of tourism, this includes;** the rise of enabling technologies has impacted the way people around the world can travel, such as through platforms in the sharing economy. Advancements in automation are also likely to transform the sector e.g. peers sharing platforms to create new tourism market spaces and business models



## Polity

Generally refers to the state of governance, trust, and accountability in the public sphere.

**In the context of tourism, this includes;** public decisions will have a role in several areas, particularly on travel mobility. For instance, mobility is significantly impacted by the degree to which national governments support international transport and facilitate travel. Governments will have to monitor the growth that comes with Megatrends; visitor numbers, safety, and security concerns, changes in travel facilitation policies, transport innovations, access infrastructure, aviation regulations, and visa control.

Both governments and industry must explore and understand the multidimensional implications of these megatrends so they can inform policy and shape the future of tourism.

They will need to have the capacity to effectively respond and adapt to these megatrends, what they are and the likely impacts and bring currently unforeseen and emerging issues onto the strategic policy agenda, develop potential scenarios and policy responses, and better assist public and private actors to capitalise on such opportunities and challenges as they arise.

Take care of your body. It's the only place you have to live.

Jim Rohn





# So why is infusing wellbeing tourism into your regional destination imperative?

According to the [Global Wellness Institute](#) the global wellness, **economy was a \$4.5 trillion market in 2018**. Growth has been driven by an expanding global middle class, growing consumer desire to adopt a wellness lifestyle, rising interest in experiential travel, and increasing affordability of flights and travel options. Across regions, Europe remains the destination for the largest number of wellness trips, while North America leads in wellness tourism expenditures. Asia has made the most gains in the number of wellness trips and wellness tourism expenditures, with demand stimulated by strong economies and an expanding middle class.

Among the 10 wellness markets analyzed, revenue growth leaders from **2015–2017 (per annum)** were the:



Global Wellness Institute

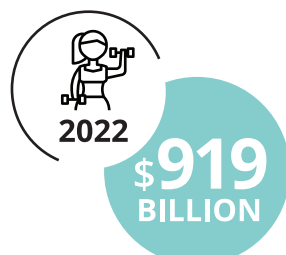
## Wellness Tourism by Region, 2017

Number of wellness tourism trips and expenditures (inbound and domestic)

Wellness tourism is a

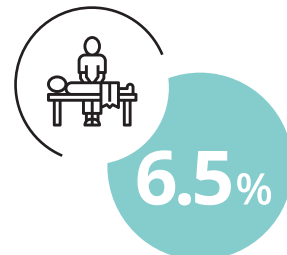


market in 2017, projected to reach



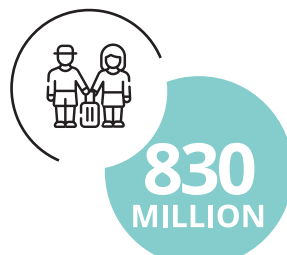
by 2022.

Wellness tourism grew by



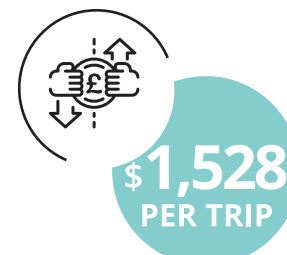
annually from 2015–2017, more than twice as fast as tourism overall (3.2 percent annually, based on Euromonitor data).

World travelers made



international and domestic wellness trips in 2017, representing 17 percent of all tourism expenditures.

International wellness tourists on average spent

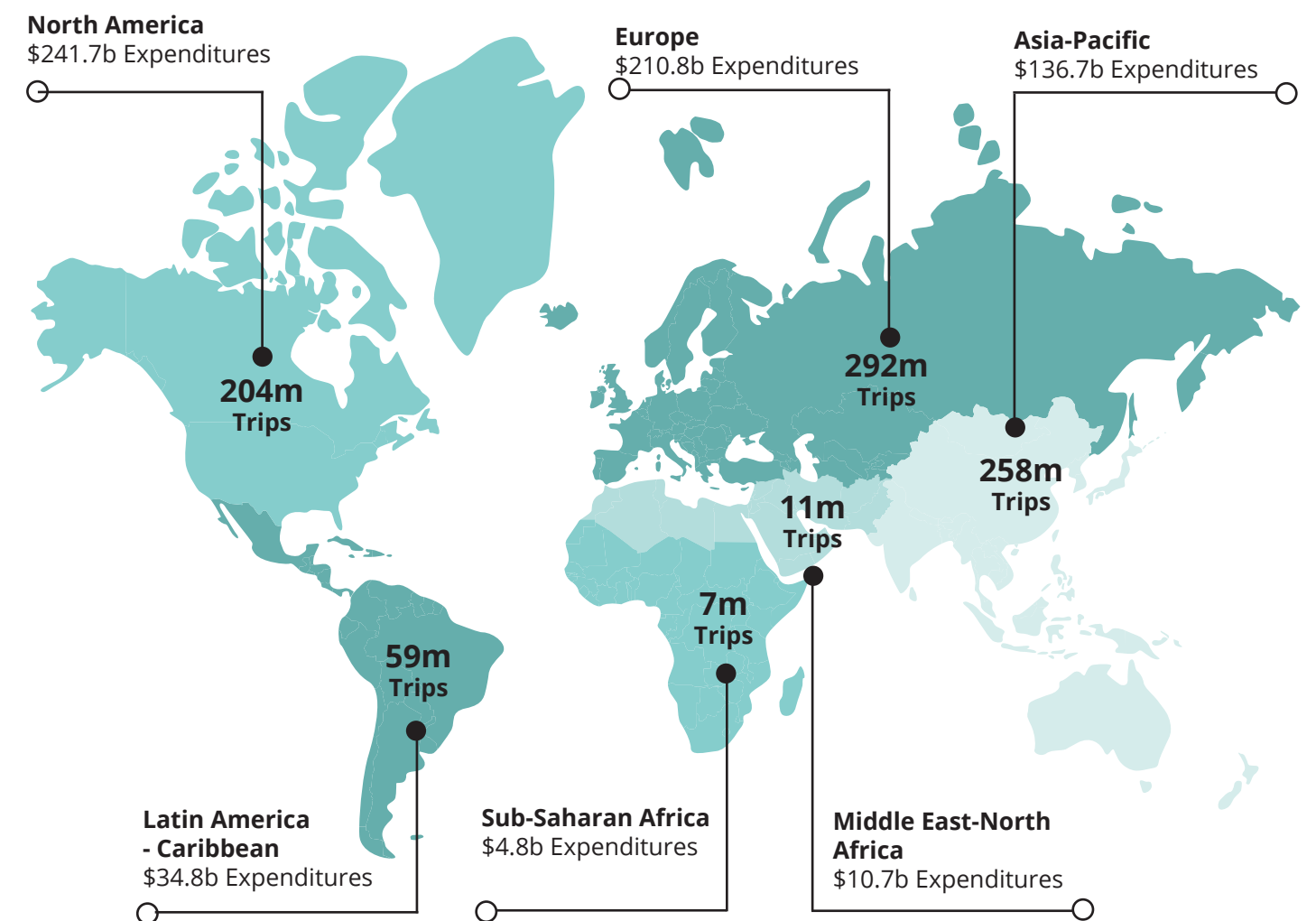


53 percent more than the typical international tourist.

Domestic wellness tourists spent



178 percent more than the average domestic tourist.



Global Wellness Institute



# Wellness Tourism is a High Growth High-Yield Tourism

Wellness travelers spend more per trip than the average tourist, and this holds for both domestic and international travelers. In 2017, international wellness tourists on average spent \$1,528 per trip, 53% more than the typical international tourist. The premium for domestic wellness tourists is even higher. At \$609 per trip, they spend 178% more than the typical domestic tourist. *Global Wellness Institute*



Wellness tourists spend 130% more than the average tourist

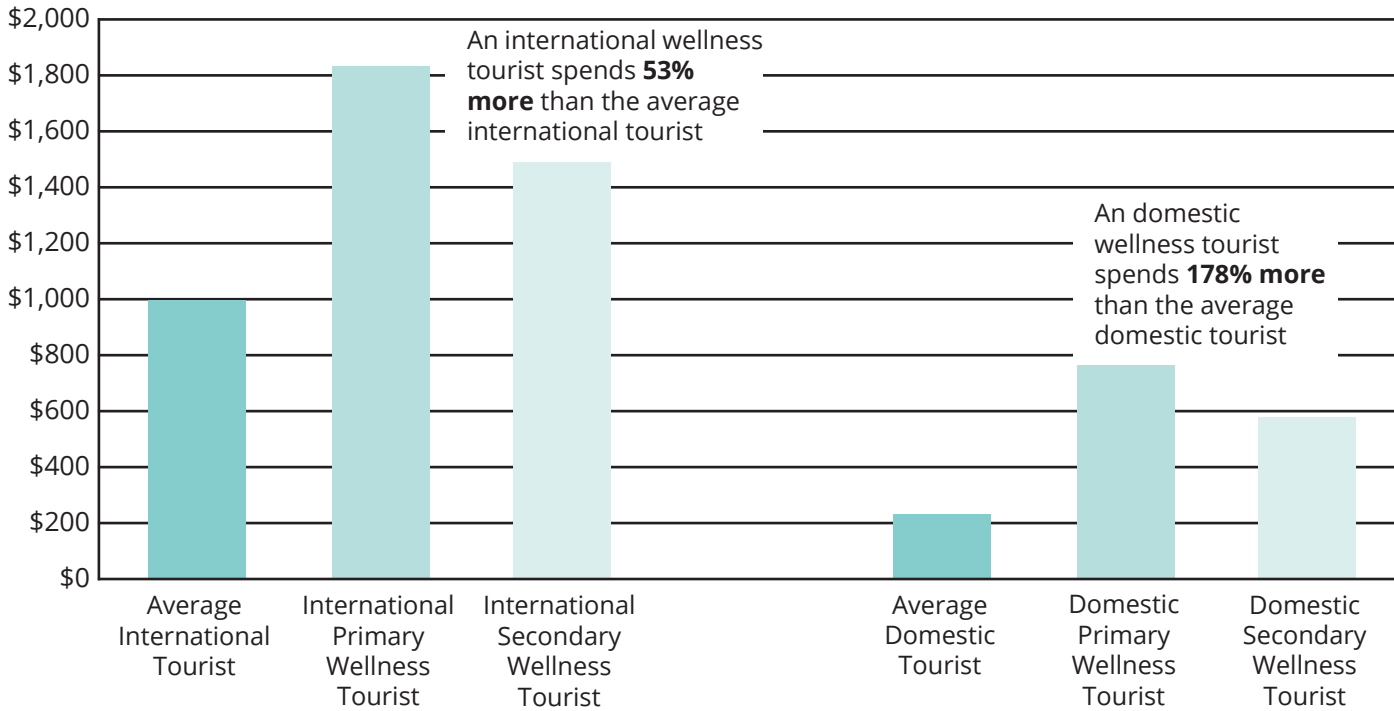
(SRI International)

## Wellness Tourism Growth Projections, 2017-2022

	Projected Expenditures (US\$ billions)		Projected Average Annual Growth Rate
	2017	2022	2017-2022
North America	\$241.7	\$311.3	5.2%
Europe	\$210.8	\$275.0	5.5%
Asia-Pacific	\$136.7	\$251.6	13.0%
Latin America-Caribbean	\$34.8	\$54.7	9.5%
Middle East-North Africa	\$10.7	\$18.7	11.8%
Africa	\$4.8	\$8.1	11.1%
Total Wellness Tourism Industry	\$639.4	\$919.4	7.5%

Source: Global Wellness Institute estimates, based upon tourism industry data from Euromonitor International, economic data from the IMF, and GWI's data and projection model

## Wellness Tourism Spending Premiums, 2017



Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor international



# Secondary Wellness Travelers

Account for The Bulk of Wellness Tourism Trips and Growth: 89% Of Trips And 86% Of Expenditures. The Wellness Tourism Market: has Two Main Types of Travelers, Primary and Secondary. However, the bulk of wellness tourism is done by secondary wellness travelers, who account for 89% of wellness tourism trips and 86% of expenditures in 2017. Secondary wellness tourism also continues to grow at a faster rate than primary wellness tourism, at 10% compared to 8% annually, from 2015-2017. *Global Wellness Institute*

## Wellness Tourism Trips and Expenditures by Region, 2015 and 2017

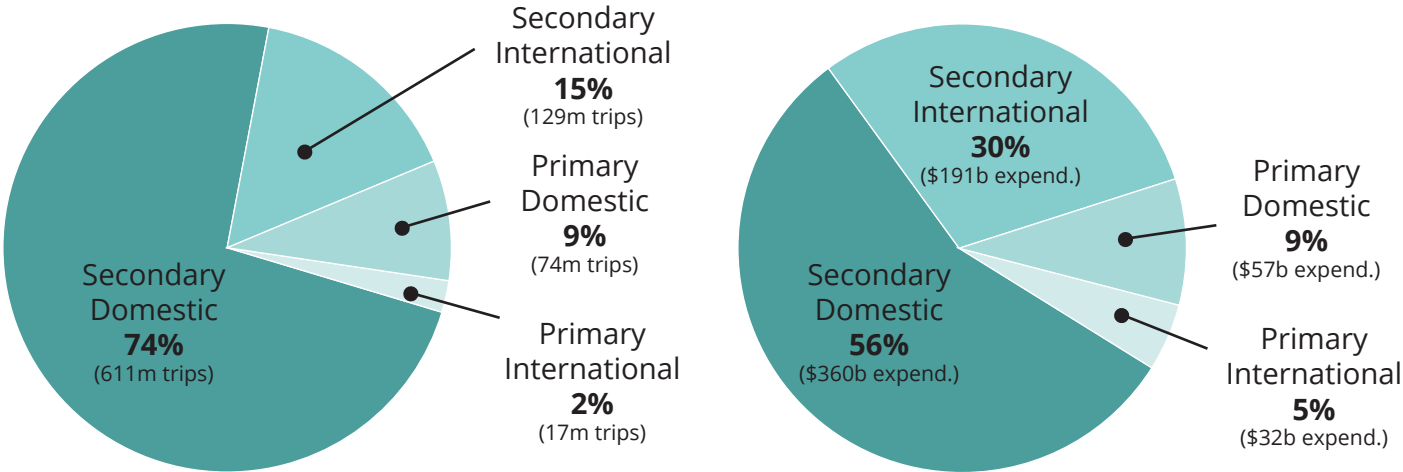
	Number of Trips (millions)		Expenditures (US\$ millions)	
	2015	2017	2015	2017
North America	186.5	204.1	\$215.7	\$241.7
Europe	249.9	291.8	\$193.4	\$210.8
Asia-Pacific	193.9	257.6	\$111.2	\$136.7
Latin America-Caribbean	46.8	59.1	\$30.4	\$34.8
Middle East-North Africa	8.5	11.0	\$8.3	\$10.7
Africa	5.4	6.5	\$4.2	\$4.8
Total Wellness Tourism Industry	691.0	830.0	\$563.2	\$639.4

*Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Figures may not sum to total due to rounding.*

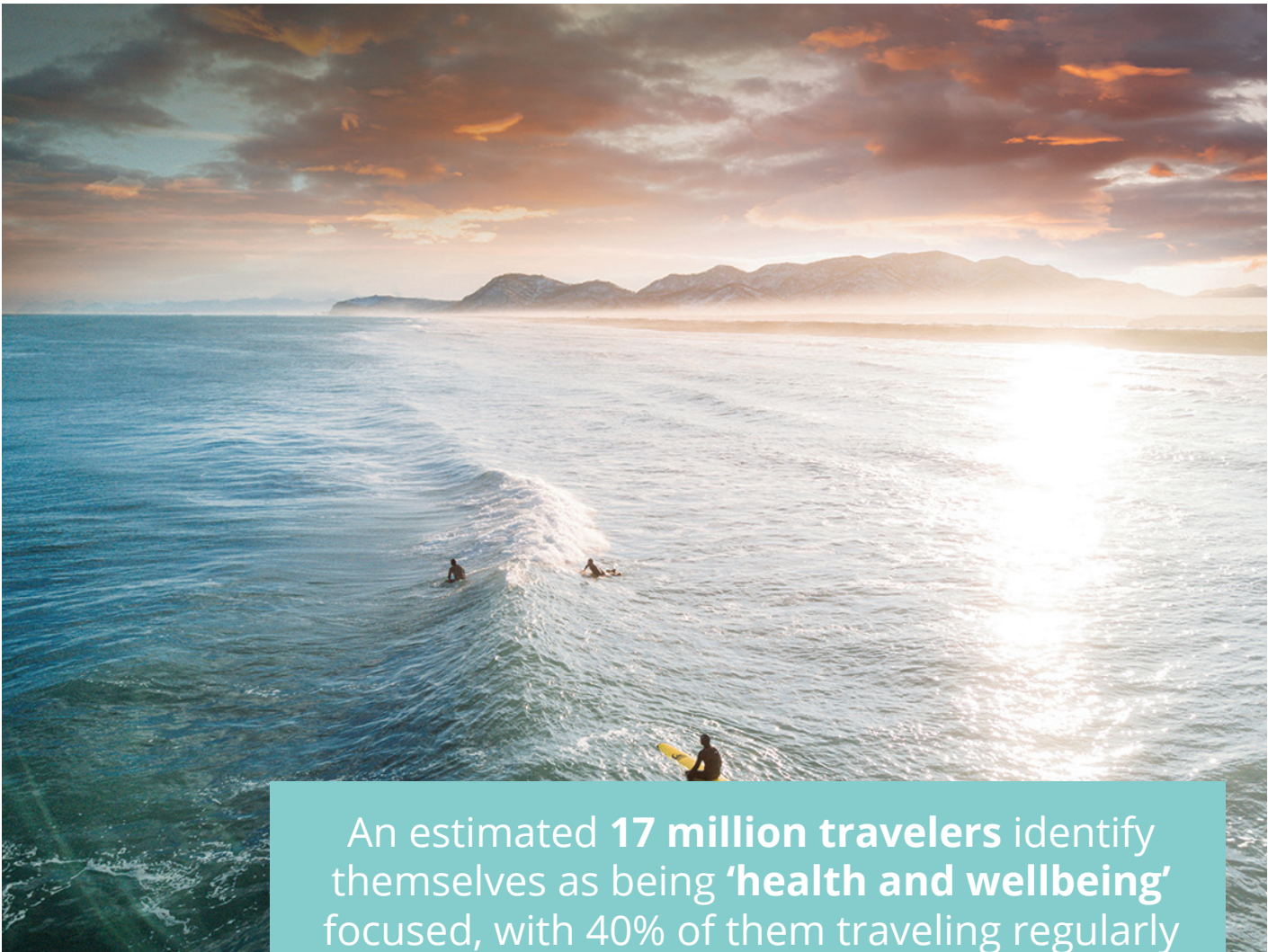
# Domestic Wellness Travel

Dwarfs International Wellness Travel, But International Wellness Trips Have Been Growing Faster. Globally, domestic travel accounts for 82% of total wellness tourism trips and 65% of expenditures. International wellness trips represent a proportionally larger share of expenditures because the average level of spending on an international trip is much higher. International wellness tourism trips have also been growing at a faster pace (12% annually) than domestic wellness tourism trips (9% annually) from 2015-2017 *Global Wellness Institute*

## Secondary and Domestic Wellness Travel Lead in Trips and Expenditures



*Note: Figures may not sum to total due to rounding. Source: Global Wellness Institute*



An estimated **17 million travelers** identify themselves as being ‘**health and wellbeing**’ focused, with 40% of them traveling regularly

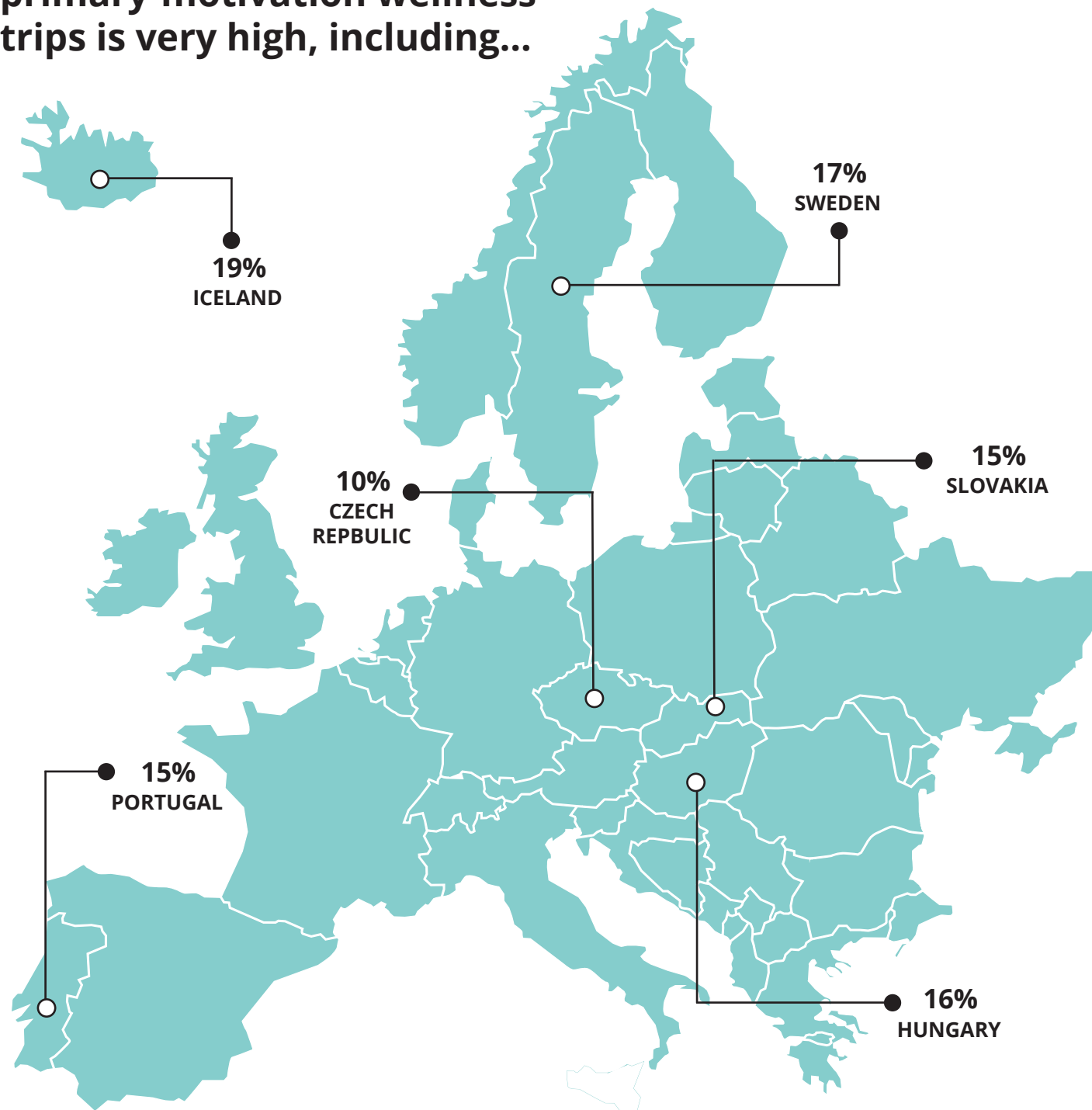
HVS, 2014



## European's Wellness Travel Motivations

In a *Eurobarometer survey* of 30,000 Europeans across 33 countries, 13% indicated that wellness/spa/health treatments were their primary or secondary motivation for going on holiday in 2015 (and the share of trips for which wellness was a primary motivation has doubled, from 3% in 2010 to 6% in 2015).

**In several countries, the propensity for primary-motivation wellness trips is very high, including...**



It is believed that the term wellness has emerged from the WHO notion of 'well-being' and the concept of fitness. In the Central and Southeast European countries, there is an enhanced emphasis on sunshine, sea air, and thalassotherapy. Physical fitness is also seen as an integral part of everyday wellness. In Asian countries, many spiritual activities such as yoga, meditation, and massages are considered important daily activities.





## 05

## Wellbeing Tourism Megatrend Opportunities Regions Can Exploit



### European Regions are Already Exploiting the Wellbeing Tourism Megatrend

Every destination has something unique to offer to wellness travelers. Like most forms of travel and tourism, wellness tourism is a black and white experience.

Every destination has its own distinct and unique characteristics and offerings related to wellness that is linked with its local culture, natural assets, foods, etc. Some travelers may be satisfied with a generic massage, exercise class, or smoothie. Others simply want to escape to somewhere different and unique, a completely different environment. Destinations can offer unique and authentic experiences that can be built on.

For example, some destinations have unique landscape formations, a specific weather pattern, have indigenous healing practices or ancient/spiritual traditions; native plants, multiple islands, and forests; muds, lagoons, and water with special healing properties; culture and architecture such as particular street vibes; local ingredients, produce and culinary traditions; history and culture; etc. Because each destination is different, every country and destination have something unique to offer wellness travelers.



Source: Global Wellness Institute



## Well-being tourists are high repeat visitors particularly when it is specific to the destination

Trail tourism has increased in demand and can be a big differentiator as it is specific to the geological characteristics or a destination. There are always looking for their next adventure demanding more and more experiences and expect self-guided itineraries, luggage transfer services, 'passports to a trail' which can promote repeat visitation for those who want to do one section at a time.



**Camino de Santiago, Spain**, for example, is 500 miles through four of Spain's 15 regions, has 12 different routes often taking up to 30 days to complete, and several repeat visits as some people prefer to do a section each year until they have finished it.

Health well-being tourism offerings are often specific to the destination location's natural resources and specialized medical workforce. Often tourists do not have the facilities and treatments they need in their residential country for their wellbeing or medical conditions such as eczema and psoriasis.



**The Blue Lagoon, Iceland** has specific Psoriasis Treatments based on the natural therapeutic powers of its geothermal seawater.



## OPPORTUNITY 1

### Communities and Other Sectors Benefit

Businesses, Destinations and Regions are Immediately Competitive, Unique and Popular Due to their European Location

Having a unique European location is an immediate competitive advantage when developing a well-being tourism destination. **Europe has its own distinctively unique destinations and natural resources** perfect for the wellbeing traveler. This ensures Europe remains increasingly popular and highly competitive when compared to other countries in this lucrative tourism sector.

**Wellbeing tourism is different and uniquely adaptive to each tourism destination it resides.**

When we talk about destinations, we become quickly aware that each destination is unique in terms of its unique landscapes, weather, cultures, people, food, resources, and natural offerings. Central and Eastern Europe wellness is known for its thermal healing mineral water and spas. The Mediterranean is known for its sea and sun wellness, wave therapy, and the Mediterranean diet. The Nordic countries are known for their fresh air, walking, skiing, swimming, and saunas. Asian wellness is known for its spiritual activities such as yoga, meditation, herbs, massages, energy healing. *(Smith, Puczko, 2009)*

**Wellness tourism has existed in Europe for centuries..**

People have traveled within regions to take advantage of hot springs, historic health resorts, alpine air, sea breezes, slow food, and idyllic landscapes, in order to escape from everyday life and pursue recreation and healing. Some European governments finance wholly or partially by national insurance systems that include water-based medical treatments. Europeans are sophisticated wellness consumers, based on longstanding cultural and historical traditions across the region, and this influences their propensity for wellness travel.



**Today, the concept of wellness in Europe reaches its full maximum...**

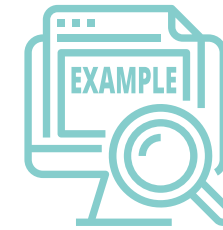
... with a modern application of ancient practices such as Ayurveda, acupuncture, yoga, meditation, etc. For example 'spas today are not just health resorts, rehabilitation centers, but modern health tourism destinations, visited also by healthy people with the motive of preventive health care, those wanting to use the wellness services and those who want to relax, detox (detoxification), recreate, lose weight, stop smoking, engage in sports activities, enjoy socializing, cultural environments and events, discover culinary specialities etc.'. (Vesenjak, 2010)

**European well-being tourism experiences are in high demand and are being integrated into other tourism attractions...**

... such as local culture, natural assets, foods, etc. Residents and travelers can take advantage of a generic massage, exercise class, unique accommodation, culinary experience, or outdoor activities. Other unique and authentic wellbeing experiences are being developed and integrated; indigenous healing practices; ancient/spiritual traditions; native plants and forests; special muds, minerals, and waters; vernacular architecture; street vibes; local ingredients and culinary traditions; history and culture; etc. What is clear is wellness travelers can go to Europe to 'escape' and go someplace different and where they can be immersively free and relaxed in multiple high demand wellbeing experiences.

**A majority of European countries already promote some form of wellness on their national tourism websites.**

Other countries are focusing on developing the sector as part of their national tourism development/marketing strategies. Most countries continue to develop and diversify their wellness sector experiences, products, and services to remain competitive and popular. In the next section, we will look at different destinations and their key well-being tourism experience resources, then we will delve deeper into Iceland in this context how it has developed as a well-being tourism country and its regions.



## Slovenia's, Wellbeing Resources and Experiences



Calls itself the **'World's Hottest New Wellness Destination'** and is known as one of the greenest countries in the world covered in forests, Alpine mountains, meadows, lakes, caves, Mediterranean Sea, UNESCO World Heritage Sites, coastal towns, Venetian Gothic towns, wineries, honey making, cultural festivals, heritage, history, and ethnic cuisine. Health and wellness are Slovenia's biggest tourism drivers from the mountains to the Mediterranean Sea, from spelunking to spa therapy, SUP yoga on Lake Bled, forest bathing to calm the mind, hiking Triglav National Park, spas and spa treatments, wellness retreats, resorts, medical centers, saunas, beekeeping (apitourism), eco-conscious, apitherapy, hydrotherapy at Pannonian Basin or Terme Zrece. Detox wrap using locally harvested mountain peat and volcanic mud.







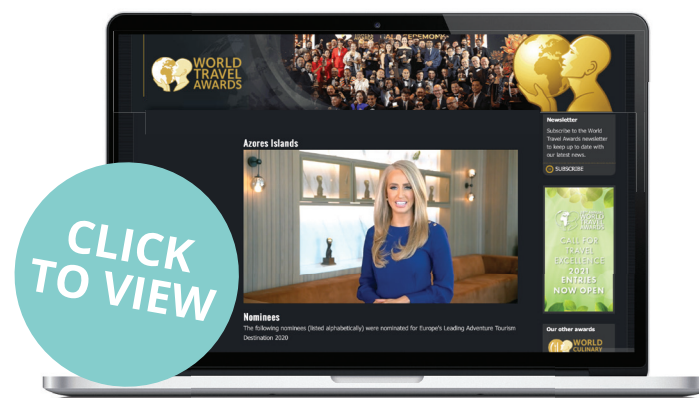
## The Azores, Wellbeing Resources and Experiences



Azores, Portugal

Located 1000 miles out to sea off the coast of Portugal is an archipelago with nine small volcanic islands. The Azores has a mild subtropical climate that has created a lush green landscape, with gorgeous vistas, exquisite rock formations, fabulous crater lakes, stunning coastlines, and dark sand beaches with crystalline seawater. Due to a rich natural environment, the Azores has loads of active nature-based and adventure tourism. Recognised as a sustainable destination by the **Global Sustainable Tourism Council**.

The islands' remoteness has created a particular slow-paced way of living, with neat medieval-like traditions, **tasty food**, very friendly people, and **charming small villages**. Hardly any crime makes the Azores as safe as a tourism destination can be. Volcanic activity has created incredible hot springs, both on land and in the sea, and have been key resources for ultimate wellness experiences. The Azores was recently Awarded Europe's **'Leading Adventure Tourism Destination 2020'** by the **World Travel Awards**



## Iceland's Takes Advantage of its Unique Location and Natural Resources Making it a Competitive Wellbeing Destination



Seljalandsfoss Waterfall Iceland

Showcasing  
Iceland's Unique  
Wellbeing  
Tourism Experiences  
Across Iceland  
using Existing  
Iconic Destinations  
and Attractions

Using Iceland's Unique  
European Location and  
Experiences as a  
Competitive Advantage

Unique Resources  
(e.g. Hot Pools, Lagoons,  
Geothermal Pools) and  
Natural Resources  
(Waterfalls, Lava Fields,  
Ice Caves), Existing  
Wellbeing Experiences  
Adventure, Slow Adventure,  
Spas, Physical Wellness  
and Healing Experiences

Developing a  
Unique Wellbeing  
Tourism Region

Using the National Park  
of Vatnajökull Region  
as a Case Study Example  
how Iceland developed a  
wellbeing tourism region,  
including Networking,  
Branding, Packageing,  
Positioning etc





## Title

**Iceland takes advantage of its unique destination, location, and natural resources offering high demand wellbeing experiences across the country and its regions**



## Description

This case study investigates how Iceland takes advantage of its unique location and natural resources to develop its well-being tourism experiences. The case study looks at how businesses in the region of The National Park of Vatnajökull have adapted well-being tourism into their region. At the end is an example of how a region adapted a 7-day wellness tour around the famous Iceland region of Reykjavik.



## Unique Natural Resources

Iceland sits on two tectonic plates that cut through the country like lightning. They are constantly thrusting together, creating a highly active geological system and a lot of geothermal activity. These hot water sources are everywhere, and Icelanders have used to bathe in since settlement. The endless water supply comes up from the ground and contains healing minerals. Wellness tourism has its roots in the long history of Iceland's spa resorts, and in that sense is not a new phenomenon but more recently wellness tourism has been evolving around Iceland's facilities for medical treatments, as well as pure leisure and relaxation sites. Iceland's resources and strengths for wellbeing tourism is the clean air, unspoiled nature, clean and good water, and hot pools. The nation's high educational level, well-educated health professions, and a good health care system are also important resources.



## Outcomes

Iceland has taken its existing natural resources, iconic attractions, and experiences that fit the wellbeing concept and formulated an extremely competitive wellbeing tourism destination. Iceland identified its well-being tourism activities, services, and experiences and communicated them using key well-being tourism branding and messages. As a result, tourism SMEs, regions, and destinations have been able to take advantage of wellbeing tourism as a megatrend identifying their own regional niche wellbeing offerings. Subsequently, G Adventures a popular global tour operator has identified and formulated a popular 'Iceland Wellness' package and itinerary which they promote suitable to their customers' demands and needs.

# Showcasing Iceland's Unique Wellbeing Tourism Experiences Using Existing Iconic Destinations and Attractions

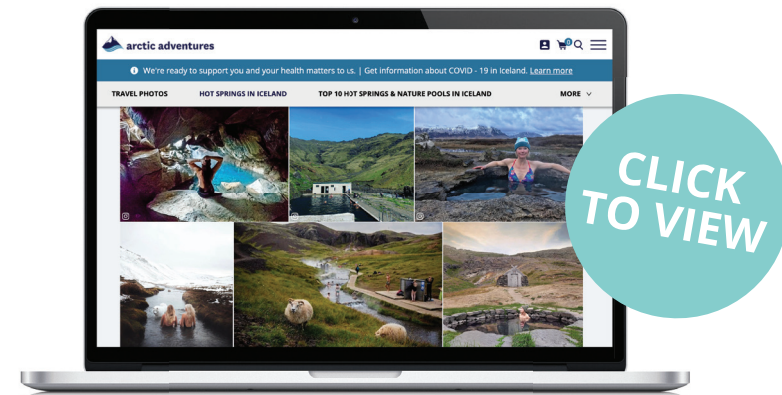
Iceland's well-being experiences are primarily in the outdoors that are unique, healing, refreshing, and reviving. Iceland continues to build and integrate wellbeing experiences into its existing offerings; immersive nature, the outdoors, social life, fresh air, hot pools, native horses, and beer, hiking up or walking on glaciers, winter sports, cave tours, air tours, climbing, 4wd tours, bird watching, playing golf, fishing, horseback riding, boat tours, kayak tours, mountaineering, trekking, ice climbing, snowmobile tours, super jeep tours, eco-tours, culture and theme tours, private boat safari, helicopter tours, puffin tours.....



- Breathe in the crisp polar air;** the first thing you notice when you step out of the plane, no pollution! You will also notice and feel the geothermal heat of the island.
- Drink Icelandic water;** known as the purest water in the world. Untainted snow melt filters through the lava fields passing through the Olfus Spring.
- Organic foods;** Iceland's Skyr is Iceland's yogurt, its hearty Íslensk súpa (Icelandic soup), made with vegetables grown in special greenhouses powered by the abundant energy simmering just below Iceland's surface.
- Athletic snow experiences** go snowmobiling or mushing with a sled dog across snow-packed surfaces. Trek across a glacier face at Mýrdalsjökull. Saddle up an Icelandic horse and experience their unique 'fifth' gait. Or just try ice-skating on Tjörnin Pond in downtown Reykjavík.
- Find your spiritual awareness;** Iceland has plenty of wide-open spaces if you want to be alone with your thoughts. Sit at the base of a volcano, meditate from the top of an enormous boulder of lava rock on the South Coast near Dyrhóley.



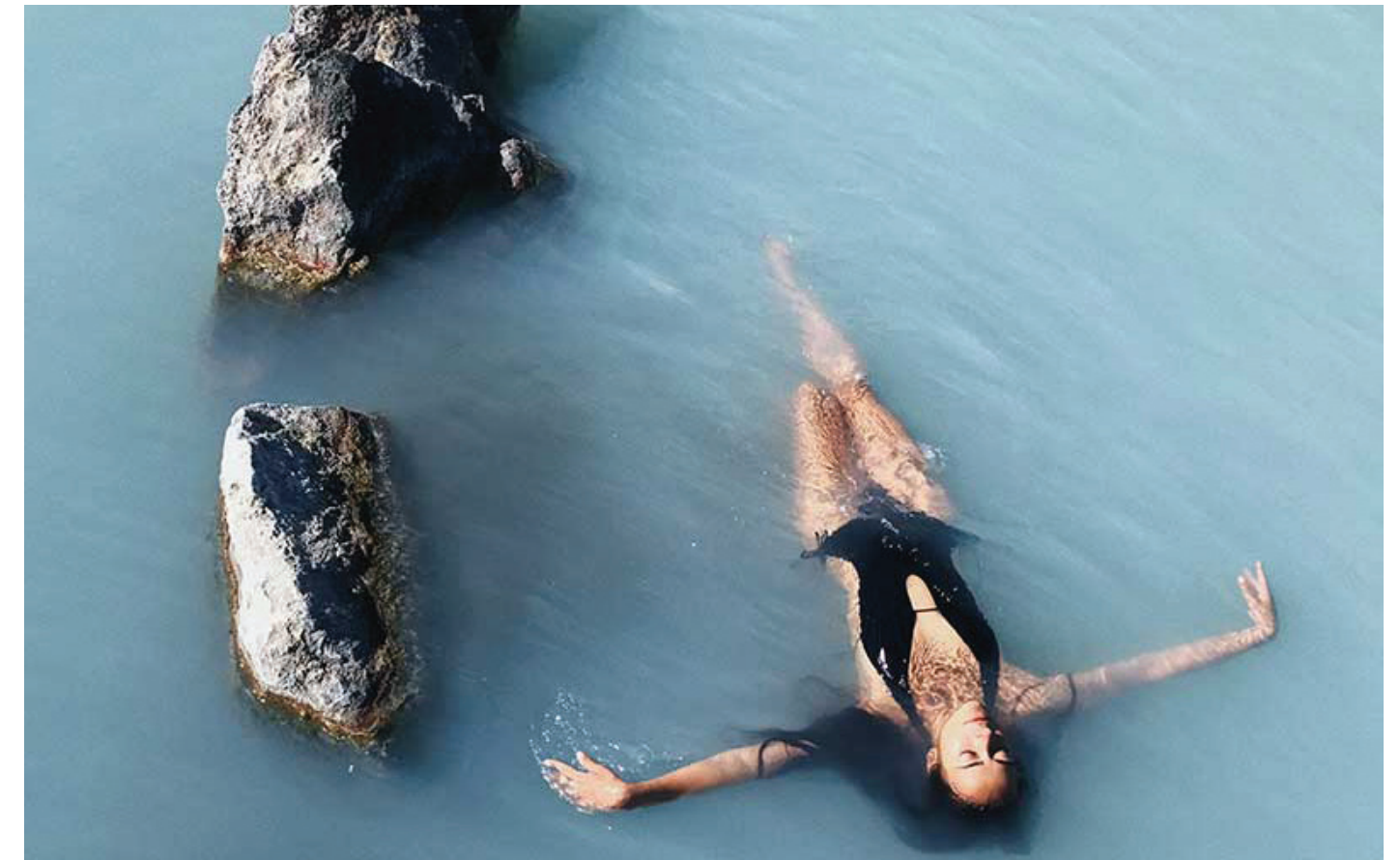
- 06 Hot springs;** Iceland has over 100 hot springs and pools distributed throughout the country, a real national institution. as the water is heated by the steam coming from the ground Iceland's geothermal pools, steam rooms, saunas, baths, hot tubs are both unique and popular for relaxing and rejuvenating the mind and body. Iceland's must-do wellbeing experiences definitely include its warm and healing waters.



- 07 Hiking** through glaciers, mountains, volcanoes, and a range of fascinating, beautiful landscapes make every hike worthwhile

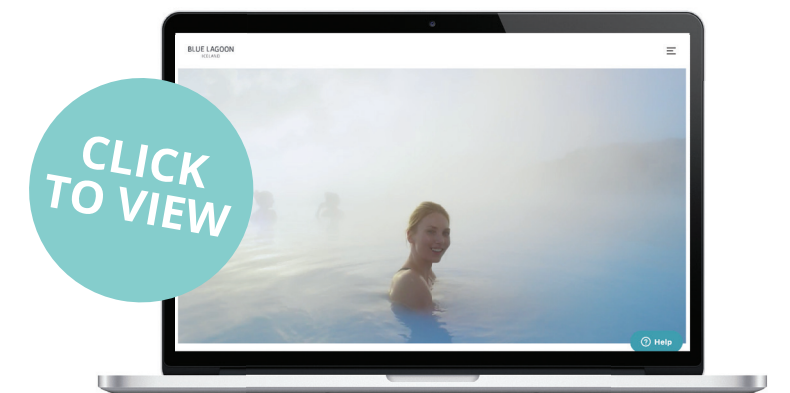


Stay fit on the trail in Landmannalaugar, photo by Arctic Adventures



Lagoons, Let Your Troubles Drift Away! photo by Arctic Adventures

- 08 Healing Lagoons** The Blue Lagoon is a world-famous hot spring spa facility and Iceland's most famous geothermal spa. Known for its magical blue color and healing powers. The water is very rich in silica and other skin-nurturing minerals so much so that Icelandic doctors even write out prescriptions for their psoriasis patients to go to the Blue Lagoon. The Blue Lagoon has wellbeing experiences suitable for different price point wellbeing travelers offering; The Blue Lagoon visit only or with two types of accommodation (Silica Hotel, The Retreat Hotel), add in a Spa Retreat or go to one of their restaurants; Lava for gourmet dining and Moss recommended by 2019 Michelin Guide





- 09** **Gentle kayaking (or river rafting,** for the more adventurous!) has numerous health benefits, including moderate, low-impact cardiovascular exercise and a chance to enjoy the fresh air and the sun's vitamin D.



Kayaking at Solheimajokull Glacier photo by Arctic Adventures

- 10** **Horse riding** Connecting with animals, especially horses, is terrific for your wellbeing (with a growing body of [research providing evidence of this](#)). Horse riding requires calm, attention, and a good relationship (however brief) with your animal. [Black beach horse riding tour](#) is on the otherworldly and captivating Víkurfjara Beach. Covered in black sand and surrounded by strange volcanic rock formations, this (like much of Iceland!) is like nowhere else on Earth.



Horses in Lupin Fields at the base of Mt. Kirkjufell

## Iceland's Famous Reykjavik Region 7 Day Guided Tour Itinerary

External wellness tour operators **G Adventures** have a dedicated 'Wellness Iceland' taking wellbeing travelers around the Reykjavik Region for 7 Days on a guided tour



Your soothing journey across the country's southern coast starts with a hike up Öskjuhlíð Hill overlooking the mosaic-like architecture of Reykjavik. Private transportation offers you the luxury of time to see the iconic sights of the Golden Circle and Thingvellir National Park before heading to the stunning black-sand beaches of Reynisfjara for a unique meditation session. And, of course, a visit to Iceland would not be complete without a stop at the Blue Lagoon, a naturally heated hotspot for travelers willing to go halfway around the world just to unwind. (G Adventures)





# Iceland Develops a Unique Wellbeing Tourism Region Using the Vatnajökull National Park



## Title

**National Park of Vatnajökull, Iceland**



## Description

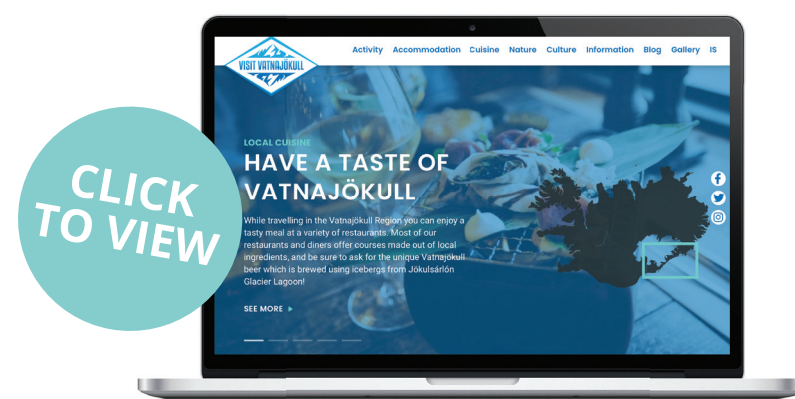
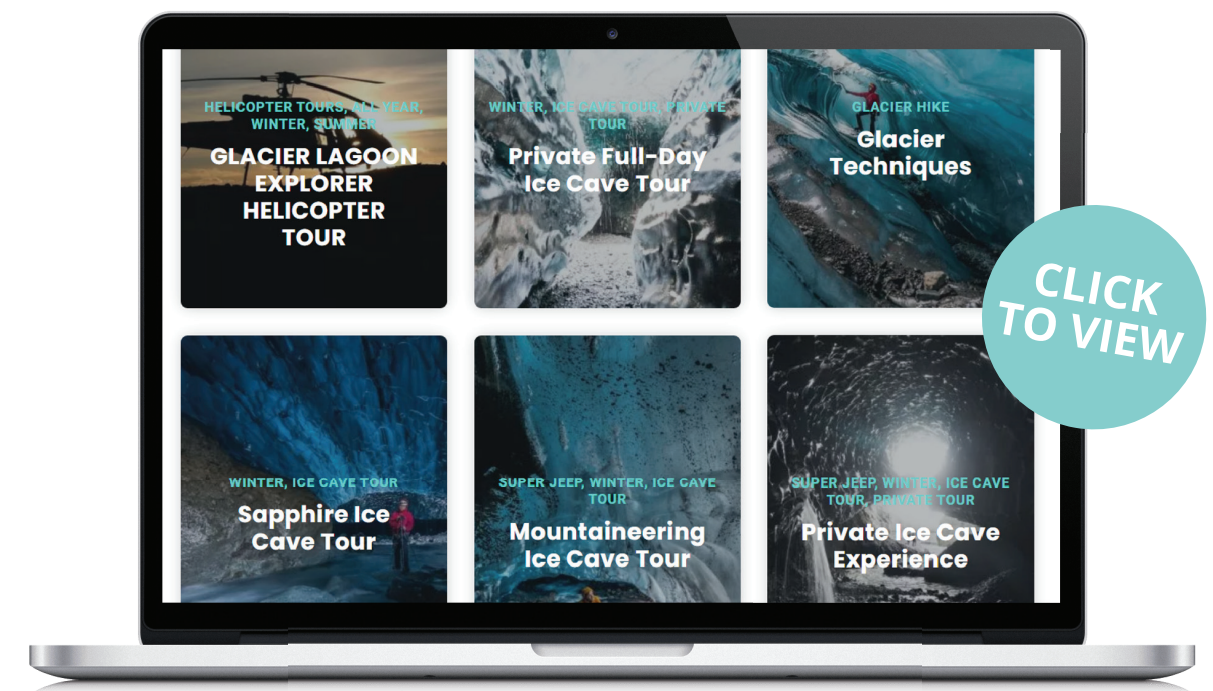
National Park of Vatnajökull is in every sense the land of ice and fire, with its towering glaciers and active volcanoes. These forces have been shaping the land for many thousands of years and the nearest examples of that are the powerful eruptions in Eyjafjallajökull 2010 and Grímsvötn 2011.

There are amazing landscapes in the area - mountains, lakes, black sandy beaches, green pastures and meadows, powerful glacial rivers, beautiful waterfalls, and vast lava fields, some covered with thick and sensitive moss. Vatnajökull National Park is a protected wilderness area in south Iceland centered around Vatnajökull glacier. Vatnajökull glacier is Europe's largest icecap (2110 m) An iconic volcanic region covers nearly 14% of Iceland. The region includes Jökulsárlón, a glacial lagoon with icebergs, and the Svartifoss and Dettifosis waterfalls. Skaftafell is the gateway to the park with a visitor centre, campground, and hiking trails. Wellbeing tourism is immediately evident on their website '[Allow Us to Take Care Of You](#)'.



## Well-being tourism experiences

There are multiple clusters with destinations emphasising wellbeing nature experiences, slow adventure, physical activity, and mindful traveling. Tourism entrepreneurs in the area have harvested nature-based outdoor activities, with several of them being wellbeing experiences. They take advantage of the region's natural resources; massive glaciers, ice caves, snowy mountain peaks, scenic views and landscapes, favorable outdoor weather, selection of hiking trails, historical sites, Northern Lights, fireworks, active geothermal areas, and rivers. Their main goals are to protect nature and wildlife, to ensure public access to nature, to research and educate, and to strengthen the settlement and economic sustainable activity in its vicinity.





## Communities and Other Sectors Benefit

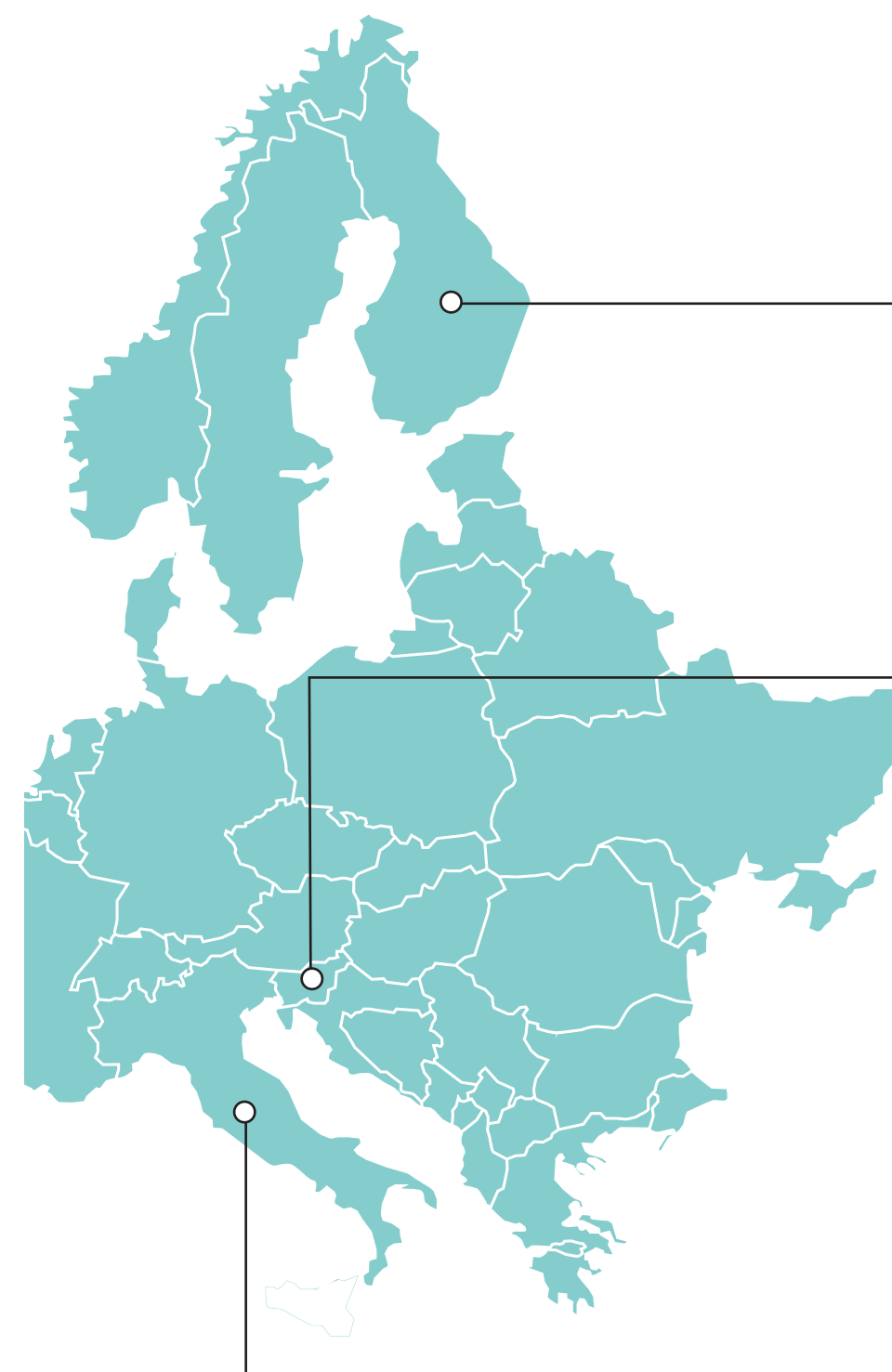
For other sectors and communities to benefit from the opportunities presented by wellbeing tourism governments and regions need to adapt wellbeing tourism-focused developmental policies, national initiatives, encourage investment and partnerships and integrate with other wellness sectors

Well-being tourism integrated with national, regional, and community development brings a wide range of opportunities and benefits to the destinations and the people who live there, sustainable development, job creation, pride of place, conservation of local nature and resources, etc

As governments and the tourism industry's understanding of wellness tourism evolves, regions no longer see it as an isolated niche tourism offering for a small segment of wealthy tourists, but rather as an opportunity to bring wide-ranging benefits to local economies, other sectors, and populations. Well-being tourism can impact business development, sustainable growth, social and economic involvement which is contained in the wider policy agenda ([Deloitte, 2013](#)). In some places, wellness tourism regions, governments, and development agencies have integrated it with local and regional urban planning, economic development, and community development initiatives.



## OPPORTUNITY 2



**FINLAND** seeks to use public-private partnerships to enhance its wellness tourism offerings. ([Finland as a Competitive Wellbeing Tourism Destination Report](#))

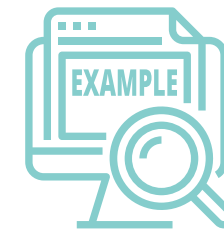
**SLOVENIA** have national initiatives designed to encourage investment in wellness sectors ([Annual Tourism Report 2017](#)).

**ITALY** recently launched Terme d'Italia, a [project](#) aimed at stimulating demand for spas and wellness resorts in eight regions. The project involves the regions of Calabria, Emilia-Romagna, Lazio, Lombardy, Puglia, Sicily, Veneto, and the Autonomous Province of Bolzano.



**There are many stakeholders and communities who can collaborate to develop and benefit such wellness initiatives...**

... including many government players involved in tourism, economic, social, health, and environmental development. The collaboration of communities, private businesses, and public-sector stakeholders across these sectors is critical for destinations and regions to develop wellness tourism successfully and to maximize the positive economic and social impacts. Well-being tourism stakeholders are needed from key sectors, hospitality and tourism infrastructure, wellness lifestyle, wellness and prevention, and government. Policymakers need to facilitate the unison and partnering of such sectors and stakeholders by modernising regulatory and legislative frameworks, encouraging and cultivating partnerships, and exploring ways to future proof tourism policies and regions.



Austria's Tyrol region



Austria's Tyrol Region; Image by successtours.com

A few regions are already connecting wellness tourism with the broader development of a wellness industry cluster that can grow local business and employment opportunities. For example, **Austria's Tyrol region** has leveraged wellness tourism to develop a broader "Cluster Wellness Tirol" initiative to cultivate other economic opportunities and innovation around wellness.

Today it has created a wellness network, which includes more than 100 businesses in telemedicine, food, nutrition, spa equipment and technology, workplace wellness, mountain biking, swimming, road biking, walking, and other wellness-related fields.



## Many Stakeholders Can Collaborate and Benefit from Wellness Tourism



Source: Global Wellness





## Roman Thermal Spas of Europe



Multi-country and multi-regional partnerships are forming **Roman Thermal Spas of Europe** is a multi-country (Greece, Germany, Hungary, Portugal, France, and Bulgaria) partnership to develop and promote thermal tourism packages involving spas and health resorts with a Roman origins.



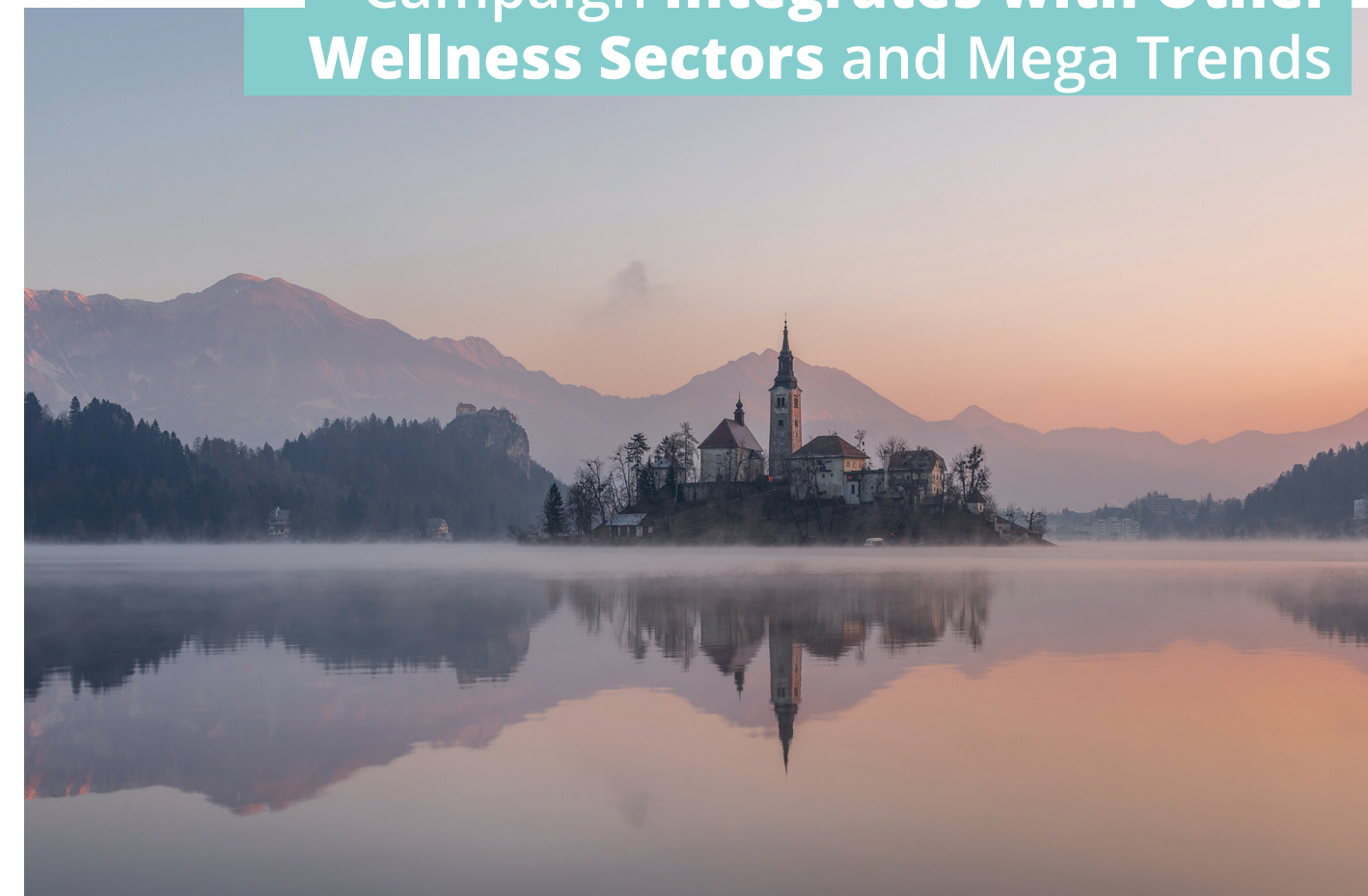
**Wellness tourism also provides destinations with an opportunity to reduce the seasonality of visitor flows.**

For example, ski destinations can attract wellness travelers interested in hiking and other outdoor activities in the summertime, while beach destinations can appeal to travelers who are looking for a more tranquil environment to destress or take a retreat in the wintertime.

**There is also huge potential and opportunities for destinations and regions to integrate with other wellness sectors...**

... and work together to exploit the wellness economy. The figures speak for themselves; healthy eating, nutrition, and weight loss are worth \$702 billion, fitness and mind-body \$595 billion, technology will be the second-fastest-growing market at 8.6 percent annually but the **Mindful Movement sector** will be the #1 growth sector 12 percent annually from 2018–2023.

## Slovenia's New Wellbeing Tourism Campaign Integrates with Other Wellness Sectors and Mega Trends



### New Wellness Sector Trend Mind Movement



Long term benefits from physical activity, relaxation, detoxication, self-healing and self-contentment improvement

### Slovenia's New 'Selfness' and 'Mind Movement' Experience Development Campaign

#### 'Wellness and Selfness'

- **Spirit & mind** positive energy points, nature
- **Health** wellness services
- **Vital cuisine** vegetarian and macrobiotic diets
- **Beauty and cosmetic** treatments, natural products
- **Relaxation**, comfort yoga practice,





## Title

**Slovenia is already adapting the mind movement in its new 'Wellness and Selfness' branding**

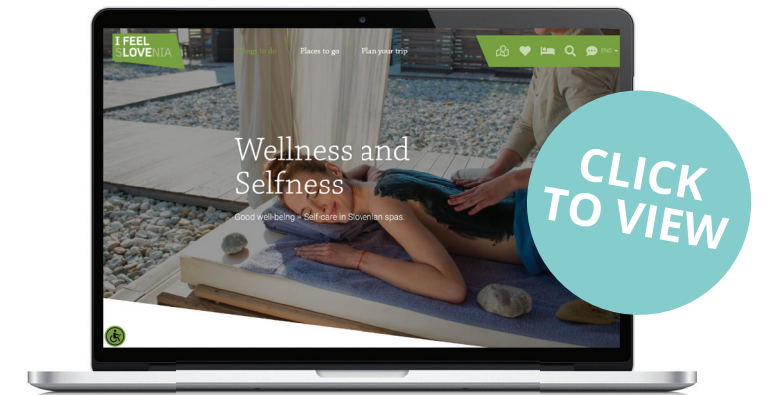
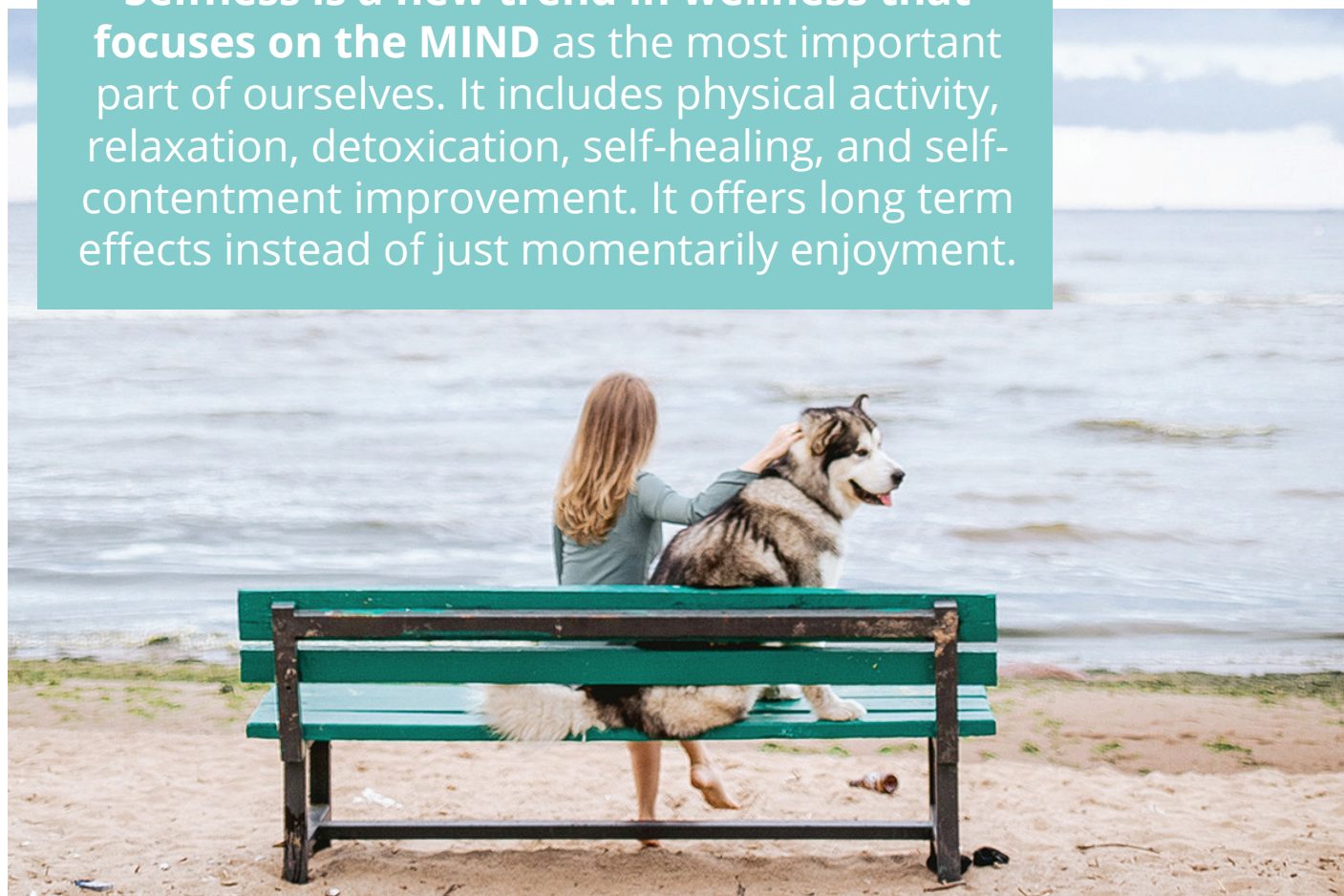


## Description

Slovenia is an example of new and emerging wellbeing tourism region developing a truly authentic and place-based wellbeing tourism product and brand. They have latched onto the **'Mind Movement'** in its new wellbeing tourism branding campaign **'Wellness and Selfness'**

Slovenia adopted the Mind Movement into its wellbeing tourism strategy by developing and creating the **'Wellness and Selfness'** campaign complementing its main branding umbrella **'I Feel Slovenia'** tourism brand successfully building a high-value wellness tourism offering to combat mass tourism and reduce seasonality. The **'Wellness and Selfness'** tourism campaign has developed Slovenian regions and generated awareness of wellness tourism around their unique natural and cultural features. It also links the existing 'wellness' offering with a new diversifying 'selfness' offering redefining its wellbeing tourism experiences and offering even more choice to their tourists making sure they are known as a destination all about health, purpose, and happiness.

**Selfness is a new trend in wellness that focuses on the MIND** as the most important part of ourselves. It includes physical activity, relaxation, detoxication, self-healing, and self-contentment improvement. It offers long term effects instead of just momentarily enjoyment.



The Slovenian campaign is unique because it takes place in a healthy environment of nature, which has therapeutic effects on us with its relaxing colours, subtle soothing sounds, and healing fresh air. Wellness with pampering, relaxation, and treatment campaigns are supplemented by selfness campaigns – wellness and selfness together are designed to create a lifestyle that puts physical and mental health, and good energy at its center. Relax with wellness experiences, invigorate yourself with selfness discoveries.



### Spirit & mind

positive energy points, engaging with nature, social and cultural events, sightseeing, workshops, lectures, etc



### Health

wellness services associated with traditional medicine and beauty clinics



### Vital cuisine

a selection of various vegetarian and macrobiotic diets



### Beauty and cosmetics

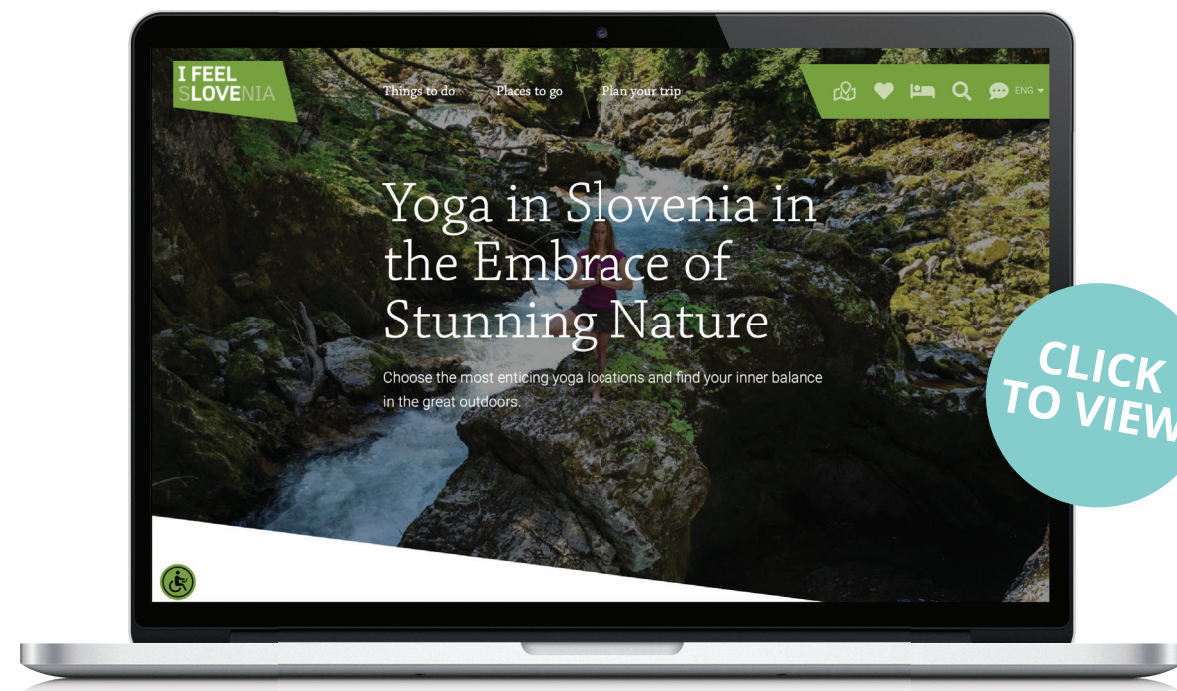
services provided in beauty centers, natural products, cosmetic massages, pedicure, manicure, and hairdressing salons



### Relaxation, comfort

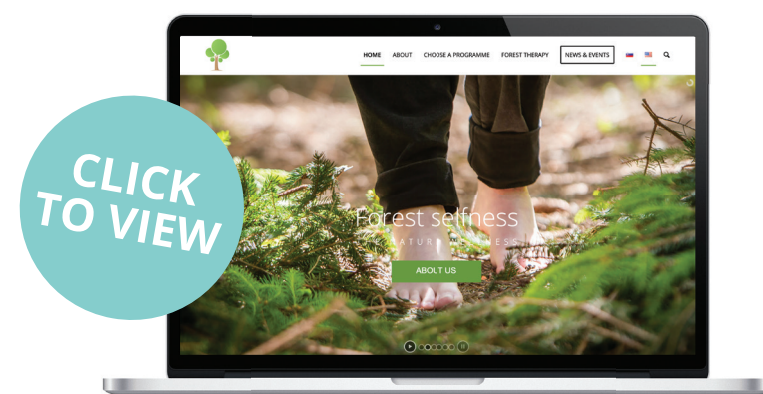
various massages and baths, yoga practice, pilates, and tai chi



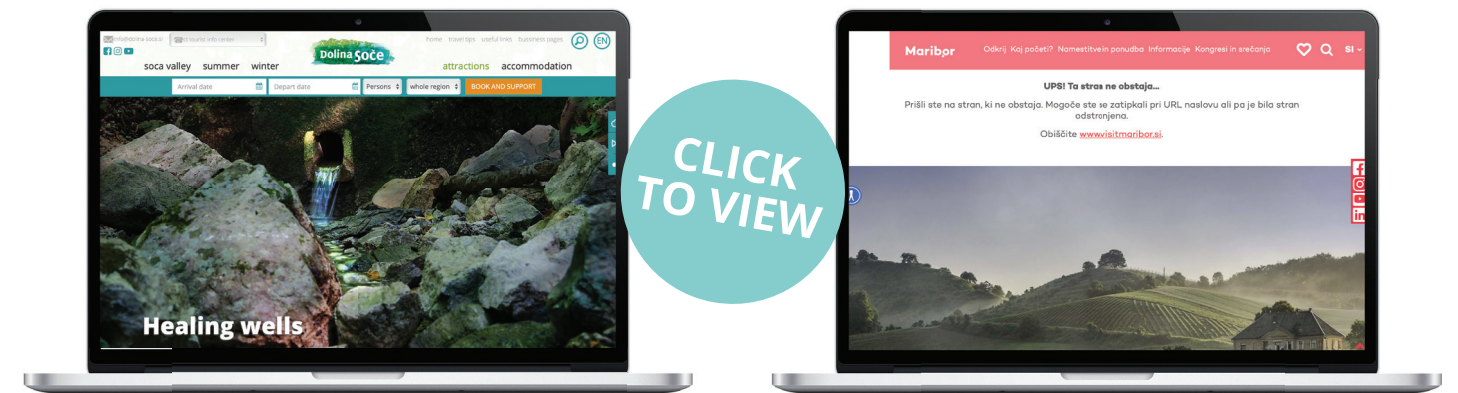


The campaign is broken up into several campaigns 'Find a way to rebalance your body and spirit' is reflected in the 'Back to Nature – Find Yourself with a Selfness Experience' campaign. Below is the campaign and examples of the types of 'Selfness' experiences involved in each theme. For example, the theme 'Selfness. Life as an Individual' visitors 'learn how to redirect back and reconnect with yourself, manage stress, learn about self-healing techniques, and relax'.

- **Loyal to Yourself Experience** the unique forest selfness in the heart of the Cerkno forests; nature's relaxing colours, soothing sounds, and healing air will help you reconnect with yourself. Walk barefoot in dew-covered grass to achieve better blood circulation.



- **Positive Energy at Energy Points Slovenia** is home to countless energy points and centers where you can feel the positive effects and a surge in fresh life energy. Experience a surge of healthy energy at the Julian Alps, in the **Soča Valley**. Explore the forests of Pohorje that can lead you to the **Bolfenk energy trail** and regain your strength in the beautiful setting of **Sveta Trojica v Slovenskih Gorica**.





## SMEs and Services Indirectly Benefit

Wellbeing Tourism also Creates Opportunities and Benefits Indirectly for SMEs and Services

### OPPORTUNITY 3

Indirect wellbeing tourism SMEs, businesses, and services capture expenditures by working with and teaming up with direct wellbeing businesses, adapting to the wellbeing tourism trend, and even better by infusing wellness into their offerings



**'Wellness' is estimated to be a 4.5 trillion global industry involving over 10 sectors**

The growing wellness tourism market is worth another \$639.4 billion with wellness travelers is distributed among many segments this includes businesses directly and indirectly related to the wellbeing tourism industry. Consumers asked when asked what would they do to enhance or maintain their wellness stated that 'taking a holiday, vacation or retreat' ranked fourth, behind exercising, eating better, and visiting a spa ([Stanford Research Institute 2012](#)). This shows the value consumers place around wellbeing tourism experiences. Wellness travelers (especially secondary wellness travelers) are looking to continue their wellness lifestyle during travel.

**Within each of the wellness tourism segment, these consumer-direct expenditures at wellness-focused activities...**

...such as visiting a hot spring, getting a massage, or taking a meditation or fitness class) such as spas, wellness retreats, thermal/mineral springs, and boot camps, yoga studios, gyms, fitness centers, and this lifestyle may encompass healthy eating, exercise/fitness routines, healthy food stores/markets, events, arts and crafts, museums, mind-body practices, nature experiences, connections with local people and culture, etc.,

**In addition, all wellness tourists also need indirect services and experiences or spend 'generic' expenditures...**

... on transportation, food, and lodging, buying souvenirs, activities, excursions, other services, and they will likely seek out shopping or entertainment — indirect businesses benefit from wellness tourism and are part of the wellness tourism economy.

## Wellness Tourism Industry in 2017

<b>In-Country Transport</b> <b>\$109.90b</b> Airlines, Rental Cars, Public Transit, Trains, Taxis	Hotels/Motels Resorts Campgrounds	Lodging <b>\$130.5b</b>	Destination Spas Health Resorts Ashrams   Retreats
	Restaurants Bars Snack Shops	Food & Beverage <b>\$111.5b</b>	Spa Cuisine Healthy Cuisine Organic Cuisine
	Souvenirs   Gifts Clothing   Art	Shopping <b>\$98.3b</b>	Fitness Wear   Spa Products Healthy Foods   Vitamins
	Museums Tours   Theater	Activities & Excursions <b>\$99.7b</b>	Spas   Bathing   Fitness Meditation   Life Coaching
<b>Other Services</b> <b>\$89.5b</b> Telecom, Insurance, Travel Agencies, Concierges			

Generic

Wellness- Specific

*Data combine both inbound/international and domestic wellness tourism spending, and aslo include both primary and secondary wellness trips.*

*Source: Estimates by the Global Wellness Institute, based on tourism industry data from Euromonitor International*





**As more consumers incorporate wellness into their lifestyles, this creates more and more opportunities for existing tourism businesses to adapt to the trend...**

...and capture expenditures by infusing wellness into their offerings; packageing together, diversifying offerings, partnering with brands, working together as a destination or region, pooling resources and collectively planning your wellbeing tourism region to become a competitive one. DETOUR Resource 2 shows you how to further develop your well-being tourism destination, packageing, digital placemaking, branding and so much more.

**By infusing wellness into all kinds of amenities and services, businesses can differentiate themselves, provide more value, and capture higher spending wellness travelers.**

Some of the simpler and flexible wellness experiences businesses can adapt by providing a yoga instructor; offering guided walks, wellness tours, or treatment in a local spa, incorporating healthy dishes in menus, integrating sustainable eco approaches, providing bikes for guests to use for free or hire, offer other local wellness experiences.

**In the next section, we look at how businesses have done this.**

How the transportation, hotels, food, retail, and other sectors are already doing this. Airports are providing spas that target wellness travelers in transit; hotels are becoming wellness-centered for those who want better sleep and regular fitness routines; specialty restaurants are serving healthy, organic, or local cuisine; transportation companies are adopting to use clean fuels or low-/zero-emission vehicles and gift shops are selling products that are connected to unique local wellness traditions. (Global Wellness Institute)



## Transport Sector

Recognizing that air travel can be unhealthy and stressful, airports and airlines are promoting health and wellness programs for their customers. Collaborations among airports, airlines, and wellness businesses are taking many forms: high-end spas, fitness centers, and wellness classes in terminals and airline lounges; in-flight meditation, wellness programming, and sleep aides; healthier food options; and even healthier/biophilic airport design.

- **Zurich** has bike and inline skate outdoors at its airport, provides rentals of inline skates, bicycles
- **Singapore**, travelers at Changi Airport can relax in fitness lounges, high-end spas, and a rooftop pool and jacuzzi; visit outdoor flower gardens, or even try the meditative art of woodcarving.
- **Lufthansa** provides its passengers with specially-designed sleep masks that help them track their sleep, its Sleep Headphone and app help you block out the sound to avoid jet lag
- **Qantas, Hawaiian Airlines, Cathay Pacific**, and other airlines offer in-flight meditation and wellness programming as part of their in-flight entertainment packages.



## Accommodation Sector

As wellness travel becomes more mainstream, many hotels are incorporating wellness into their design, amenities, services, and programming. Wellness features may include bedding and lighting that promote better sleep, windows, and shades that block out light and noise, in-room fitness equipment and videos, healthy snacks, and menus at restaurants, or on-site spas and gyms. Acquisitions, partnerships, and collaborations between hospitality companies and fitness, spa, and other wellness brands are increasingly common. An emerging trend is the adoption of wellness architecture, biophilic design, and sustainability elements into the entire design of the property.

- **Marriott** has created a variety of new health and wellness offerings, including in-room fitness programming, immersive wellness retreats, healthy food, and outdoor fitness options.
- **Westin** has expanded to a fully integrated health and wellness strategy that addresses **six pillars of wellbeing** for guests (eat, sleep, move, feel, work, and play well)
- **Hilton** has introduced its **"Five Feet to Fitness"** program, which provides over 11 different pieces of fitness equipment in guest rooms. Six Senses is highlighting **"Eat and Sleep with Six Senses"** to allow guests to focus on sleep quality and healthy eating





## Technology, Retail, Products, and Brands

As wellness routines become a daily lifestyle for many consumers, products, and brands are following their customers on their travels to help them continue these routines wherever they go.

- **Westin Hotels** are partnering with **Peloton** which is an exercise equipment company and provides streamed live or on-demand workouts.
- **Retail and product companies** like **Lululemon** (athletic sportswear) and **Free People** (women's boho clothing) are extending their wellness-minded brands into experiences, such as offering wellness retreats for their customers.
- **ClassPass** provides access to different fitness classes such as yoga, martial arts, pilates, it also offers fitness subscription packages that permit customers to take a variety of studio classes. It is currently linking with tourism destinations as a new way of integrating into the world of travel, work, and wellness.



## OPPORTUNITY 4

### Responsible and Sustainable Tourism

Wellbeing Tourism is a Responsible and Sustainable form of Tourism Development

Wellbeing tourism is environmentally and socially responsible and sustainable tourism development. This is an increasingly important factor for tourists as it benefits not only them but the inhabitants of the destinations and the rest of the world



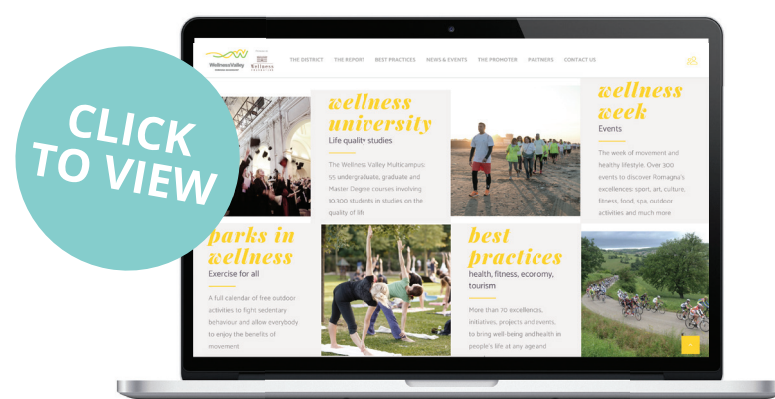
**40% of vacationers** revealed that the sustainability credentials of their travel provider are an important factor when booking a holiday - **up from 24% in 2014**

ABTA Report



## Wellness travelers also want to link and participate in the wellness of place or the regions they visit.

Responsible tourism has gone mainstream in recent years, particularly as a growing public consciousness highlights the impact of visitors on local communities and the environment. Wellness travelers will continue to seek out and expect healthy rooms, food, amenities, and programming, but they are also increasingly interested in how they impact the environments they engage in, how people live and if people are well cared for in the places that they visit. Recognizing that the wellness of a place is the DNA of its authentic wellness offering, more destinations, regions such as Wellness Valley in Romagna, Italy **'The First Worldwide District of Wellness and Quality of Life'** is prioritizing the wellbeing of their residents and their environment to create their own unique wellness value proposition and brand.



## Wellness tourism may help destinations mitigate the negative impacts of mass tourism or over-tourism.

Because wellness travelers tend to be high-spenders and favor experiences that are authentic and unique, there is less pressure for destinations to engage in a strategy based on quantity and not quality and price. For wellness to exist the communities and environments we engage in must also be **'well'**.

The wellness economy fully embraces the consumptive to contribution mindset. Future wellness travelers will increasingly link personal transformation with the connections they make during travel and their impacts on the people and the places that they touch, so that wellness travel will become a more meaningful two-way exchange between the travelers and the destination, instead of a one-sided consumptive and commercial transaction. This consumer evolution, along with the development of wellness tourism, can play an important role in mitigating the negative impacts of over-tourism in some popular destinations and regions.

## Globally

**Westin Hotels & Resorts** have organized and sponsored activities that allow guests to give back to the places they are visiting, such as **plogging** (a Swedish fitness craze that combines picking up litter while jogging) or pairing beach clean-ups with paddleboarding activities. Pushing its core wellness concept further into the idea of contribution, Westin also launched its **Thread Forward program** to upcycle used hotel bed linens into pajamas for children in need.

## Ireland's

**Strandhill, Sligo** is a stunning unique seaside with a coastal region surrounded by amazing landscapes. It won Wellbeing Destination via the EDEN Awards 2019. Strandhill integrates sustainable and climate change principles into all its well-being experiences such as the amazing local producer's food market, the delicious eateries, surfing, yoga, its thriving cultural scene, and its iconic heritage sites.



## The Azores Archipelago Islands

The Azores archipelago islands are small and deeply committed to sustainable tourism and have a very relaxed way of life, incorporating wellbeing and slow adventure experiences, a wide supply of action-packed activities. They have recently become the world's first archipelago to be officially certified as a **Sustainable Destination** by **Earth Check/Global Sustainable Tourism Council** as a sustainable destination for holidays, business, and lifestyle. Azores Terceira Cycling Holiday (Self-Guided) boasts a wide diversity of opportunities for environmentally-friendly leisure and recreation.

Water is regarded as a precious resource so the tour encourages their guests and tour leaders to follow certain policies e.g. wash dishes in a container instead of leaving the water running, always use a biodegradable soap for hiking or biking activities and never near a lake or a river, never pour water with oil or food residues in a watercourse, etc. The tours also promote respecting and protecting the fauna and flora of the visited places: do not feed or touch the animals and to not collect flowers or leaves.



## OPPORTUNITY 5

### Build on Existing Experiences

To Exploit This Trend, Regions Need to First Investigate and Develop on Existing and Potential Wellbeing Tourism Experiences



**Wellness tourism** will grow at an average annual rate of **7.5% through 2022**, considerably faster than the 6.4% annual growth forecasted for overall global tourism.

This growth forecast is well-aligned with the expected growth across many sectors that focus on wellness and holistic health (e.g., fitness/mind-body, healthy eating, organic food, etc.), as more consumers adopt wellness as a dominant lifestyle value and decision driver.

Wellness sectors and regions are realizing the wellness sector as a key decision driver for consumers. Countries are looking at their existing natural and manmade well-being and tourism resources to engage in this key driver. It is often realized at the investigation stage how unique destinations can offer a competitive advantage and unique selling points. The following case studies demonstrate how regions are investigating their wellbeing sector and potential developmental destinations.

## Ireland Finds Award-Winning Wellbeing Regions Using the European EDEN Awards



Ireland



### Failte Ireland's strategy to investigate and find

destinations offering sustainable and well developed 'health and wellbeing', tourist experiences

### EDEN European Destination Excellence Awards

Theme 'Health and Wellbeing Tourism'

### Results; 4 Regional Finalists

1. Adventure Sligo & Northwest Wellness
2. Strandhill Community Development Assoc
3. Slow Adventure Leitrim
4. Trim Tourism Network





## Title

**Faillte Ireland launches 9th European Destination of Excellence EDEN Awards with the Theme Health and Wellbeing Tourism**



## Description

Faillte Ireland (Ireland's national tourism development authority) launched the 9th European Destination of Excellence EDEN to find and investigate Irish destinations offering sustainable and well developed 'health and wellbeing', tourist experiences in their regions as a potential to grow visitor numbers. Regions and businesses included those along the **Wild Atlantic Way, Irelands Ancient East, Ireland's Hidden Heartlands, and Dublin** that offer a variety of health and well-being tourism activities, including yoga and meditation, sport and fitness, and nutritional programs provided by various services and facilities from spa resorts to activity providers.

Outcome Failte Ireland identified highly valuable wellbeing tourism regions with different offerings to further develop and add to the Irish wellbeing portfolio. Two of the wellbeing regions are in County Sligo (one focusing on adventure and the other lifestyle wellbeing), Meath (adventure festival and event), and Leitrim (slow adventure).

Eligible destinations were those where the visitor density is low; where the tourism product has been developed using local and regional health and well-being tourism while protecting the environment and meeting the needs of visitors and residents; and where the tourism offer is managed in such a way as to ensure its social, cultural and environmental sustainability.

**Fiona Monaghan, Fáilte Ireland's Head of Activities, said:**

*"Visitors are increasingly looking to connect with destinations and communities which offer authentic experiences through nature and local traditions and communities across Ireland are participating in many ways to harness these assets through tourism to deliver impactful social and economic benefits for their local areas. This year's theme of health and wellbeing tourism experiences will give those destinations offering an authentic health and well-being offering linked with their local culture and natural assets a chance to gain recognition for their experiences on the European stage and we encourage those eligible to apply."*

The **EDEN initiative aims** not only to bring greater visibility to lesser known but excellent tourist destinations, but also to help professionals and interesting localities to maximise their potential and develop tourism services in line with sustainable development principles.



Gleniff Horseshoe, Co. Sligo, Ireland

## Eligible destinations were those:

- 01** That is **"small"** or **"emerging"**, **"off the beaten track"** and **"nontraditional"** (the visitor numbers rating from low to very low in comparison with the national average). The national average is estimated to be 16,000 overnights by overseas visitors per annum.
- 02** The specific offer should have been implemented at least since 2017.
- 03** That offers authentic tourism experiences.
- 04** That is represented by a Management Destination Organisation that has a capacity in sustainable tourism management.
- 05** That has local authorities with a capacity in managing their own destination in a way to ensure social, cultural, and environmental sustainability.
- 06** That shall have agencies, NGO's or authorities in charge to protect and promote the natural and cultural heritage with a capacity in adopting sustainable tourism practices.
- 07** Destinations that have a well-developed Health & Well-Being Tourism offering that is characteristic of the reg



# The four Irish Health and Wellbeing Destination finalists were:

- 1 — Adventure Sligo & Northwest Wellness (Sligo)
- 2 — Strandhill Community Development Association (Sligo) (overall winner)
- 3 — Slow Adventure Leitrim (Leitrim)
- 4 — Trim Tourism Network (Meath)

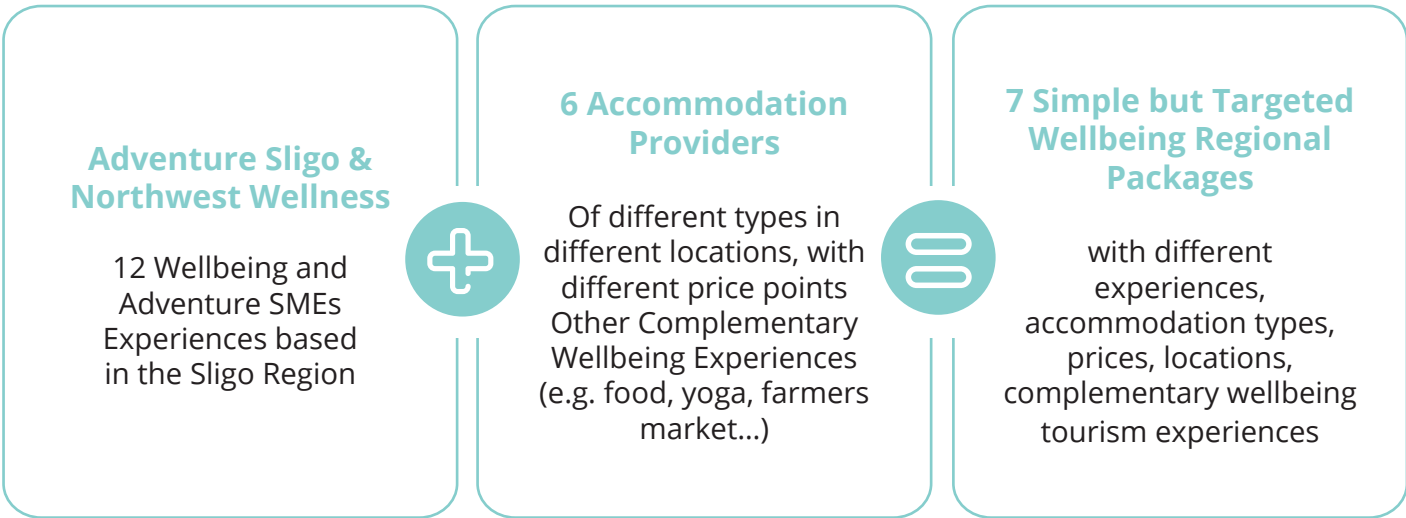


Fiona Monaghan,  
Fáilte Ireland's  
Head of Activities,  
said:

“We are delighted to announce the four Irish finalists shortlisted in this year's EDEN competition. Each of these applicants in Sligo, Leitrim, and Meath has demonstrated the best examples of how Health and Well-Being tourism have been used to benefit both tourists and local communities. These destinations offer a variety of health and well-being tourism activities, including yoga and meditation, sport and fitness, and nutritional programmes.

“The EDEN competition not only draws attention to emerging tourist destinations, but it also shines a light on businesses using sustainable practices to provide unique tourist experiences that extend the traditional tourist season – this aligns perfectly with what Fáilte Ireland is trying to achieve’.

# Ireland's Adventure Sligo & Northwest Wellness SMEs Positions Sligo as a Wellness Region







## Title

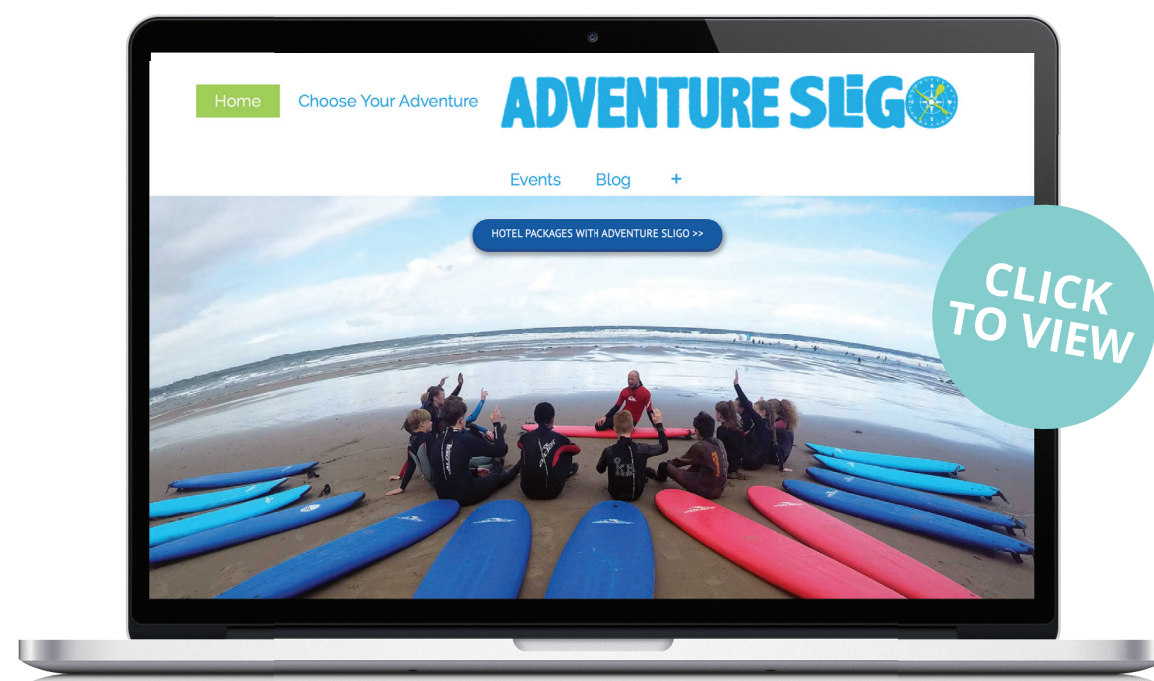
**Spotlight on Adventure Sligo & Northwest Wellness (Sligo) as a Failte Ireland, EDEN Entrant where 12 Wellbeing & Adventure SMEs Come Together**



## Description

Sligo's well-being experiences focus on adventure and its wellbeing benefits of such activities and engaging in nature and the outdoors. Sligo's rural landscape is full of the natural beauty of Sligo, heritage, and megalithic sites older than the pyramids inspire you with a guided walk or Kayak with Northwest Adventure Tours, Seatrails, Sligo Kayak Tours, or Wild Wet Adventures. Visitors can choose Ireland's Table Mountain Benbulbin, Megalithic sites in Carrowkeel, the prehistoric Caves of Keash, the wilderness of the Ox Mountain, and much more.

Carraig Climbing can bring you to new heights in stunning surroundings. Located on the Wild Atlantic Way Surf Coast, Sligo stunning beaches are perfect for surfing, bodyboarding, and Stand up Paddling with Harbour SUP N Sail, Sligo Bay SUP, Sligo Surf Experience, or Strandhill Surf Experience to choose from. World-renowned beaches from Mullaghmore, Strandhill, Easkey to Enniscrone.



## Approach

As soon as you enter the website page you are prompted to choose your wellbeing adventure and select from a number of well-being experiences that are unique due to the destination, they operate in. The 12 wellbeing SME's then developed their adventure wellbeing experiences into very simple 2-day packages where they team up with local hotel accommodations, including food and other complementary wellbeing experiences for a reduced price to suit their market needs.

- 01 **Carraig Climbing;** rock climbing, hiking tours, guided mountain walks, families/groups, educational experience, off the beaten track, mountains and rock
- 02 **Sligo Surf Experience;** bodyboarding, surfing, professional surfer, Wild Atlantic Way, 2.5 hours guided experience, surfing equipment, facilities at Strandhill beach
- 03 **Strandhill Surf Experience;** surf coach, summer surf camps, ocean safety, beach games, eco walks, surf lessons/groups/individuals, yoga to surf, and packages.
- 04 **Wellbeing Warrior;** yoga, fun, and uplifting excursions, adventure, and mindful practices, adventure activities (hiking, SUP, surfing), and meditation
- 05 **Wild West Sailing;** Wild Atlantic Way, half/full/multi-day voyages, Mullaghmore, Rosses Point, Lough Gill, Slieve League Cliffs, Tory Island, Broadhaven, Inisboffin, France and Scotland, powerboat and navigation training.
- 06 **Sligo Kayak Tours;** kayak tours of coastal estuaries, inland lakes, untouched nature, and world landmarks.
- 07 **Wild Wet Adventures;** kayaking, canoeing, SUP, hillwalking, walking, bushcraft, archery, orienteering, trail runs, team building, water tuition, and guided walks.
- 08 **Harbour SUP n'Sail;** Enniscrone, Quay Ballina, SUP tuition, hire, and adventure tours.
- 09 **North West Tour Adventures;** guided biking, hiking, walks SUP, cycling, and freediving
- 10 **Horse Riding;** scenic beach rides, 5 hours a day trail or 30 mins for children
- 11 **Angling;** charter boats, catch fish, eco-tourism tour
- 12 **Seatrails;** guided heritage walking tours





Hall (1992, 151) provides an analysis of health tourism within the context of **adventure and sports tourism**. Health tourism is compared to tourism based on its activities particularly

### Adventure Sligo Packages

- **Island View Riding Stables** - 2 Day Package  
Accommodation/5 hour horse riding
- **Sligo Surf Experience** - 2 Day Package  
Accommodation/two surf lessons
- **Wild Wet Adventures** - 2 Day Package  
Accommodation/evening meal, choice of activity
- **Wellbeing Warrior**, 2 Day Package  
Accommodation/yoga and wellbeing experiences
- **Sligo Bay SUP** - 2 Day Package  
SUP lesson
- **Adventure Tours Package** - 2 Day Package  
Accommodation/guided hiking and farmers market

### Outline of Northwest Adventure Tours 2 Day Accommodation Package

- 2 Day Package/Accommodation (B&B) Riverside Hotel
- Guided hiking break, climb three iconic Sligo Peaks (Benbulbin, Ox Mountains, and Knocknarea)
- A coastal trail to Strandhill Farmers Market in an airplane hanger set in the dunes followed by Paella lunch

Click [here](#) for full details of all packages

## OPPORTUNITY 6

### Destination Differentiation

Regions Can Differentiate Themselves by Developing and Adopting Existing Experiences to Suit the Wellbeing Traveler



**The quest for regions to differentiate themselves when designing their destinations, crafting their guest experiences, and keeping authenticity is an ongoing struggle.**

Since the recession people are increasingly turning towards health and wellness activities. Tourism providers have already latched onto the opportunity and offer attractive wellness packages in their destinations and regions. Tourism service providers, especially the luxury hotels were quick to cash upon these facts and created a palette of wellness services such as spa and health treatments, occupational health therapy, beauty treatments, sports' facilities, spiritual activities, massages, and rehabilitation programs, etc.



**New SMEs, destinations, and service providers are also latching on and diversifying into wellness experiences.**

In terms of diversification of existing SME offerings, many well-being tourism experiences are not dependent on the location, so it is easy for many regions to adapt human resources and skills, wellbeing teaching practices, services, techniques, and offerings. Examples: boot camps, meditation and silence retreats, activities with nature and wellness modalities (such as hiking to a scenic location for meditation), or yoga, and tai chi in an outdoor setting. Such well-being skills can be learned, adapted, developed, and applied to existing complementary SME offerings and wellbeing tourism regions. They are fantastic additional offerings that can be applied particularly as short-haul, weekends will getaways continue to grow — not only for couples and girlfriends but increasingly for families (including multi-generations).

**First destinations and SMEs need to understand the wellness traveler before they diversify and develop their regions into wellbeing. are modifying their amenities and programming to accommodate this trend.**

Well-being tourism isn't clear-cut and understating the If we consider all the different aspects of wellbeing tourism and the wellbeing visitor economy in terms of wellness categories, activities, experiences, and the types of businesses directly involved it creates multiple opportunities for all kinds of businesses and providers. Governments need to investigate their regions and understand their existing 'wellbeing' resources and potential so they can develop and design wellbeing destinations and businesses in a sustainable, economical, and socially viable way. Before any of this happens the primary and secondary 'wellness traveler' first needs to be understood.



## Primary Wellness Travelers

**Primary wellness travelers** are motivated by wellness to take a trip or choose their destination based on its wellness offerings (e.g., someone visiting a wellness resort or participating in a yoga retreat). By this definition, people who travel to a wellness resort, yoga retreat, or boot camp are primary wellness travelers. These are typically very committed wellness consumers who proactively maintain a healthy lifestyle, seek mental/spiritual balance, and/or are socially and environmentally conscious. When these same consumers travel for business and other purposes, they are likely to incorporate their wellness values into their decisions about hotels, restaurants, activities, etc

## Secondary Wellness Travelers

**Secondary wellness travelers**, who seek to maintain wellness or engage in wellness activities during any kind of travel (e.g., someone who visits a gym, gets a massage, or prioritizes healthy food when they take a trip). Some secondary wellness travelers will decide to take a primary wellness trip, as their interest in and experience with wellness grows. For example, a person who visits a day-use hot spring during a family vacation (secondary wellness travel) may later be motivated to plan a weekend getaway staying at a hot spring resort (primary wellness travel).



### Primary Wellness Travelers

- Visiting a destination spa (such as Canyon Ranch, Rancho La Puerta, Chiva Som, Amanda, Gwinganna, SHA Wellness, Lanserhof, etc.)
- Vacationing at a hot springs resort for a long weekend
- Staying at an ashram for a meditation retreat
- Taking a weekend spa trip for rejuvenation and stress reduction
- Traveling to a wellness center for a full-scale executive health checkup
- Taking a wellness cruise
- Staying at an eco-spa or jungle spa resort for a week
- Participating in a yoga retreat that includes healthy food and meditation in a natural setting



### Secondary Wellness Travelers

- A business or leisure traveler who actively seeks out healthy accommodations, food, and fitness options during a trip
- A family that spends a day at a hot springs bathing establishment as part of a holiday trip
- A vacationer at a beach resort who wants to visit the spa and salon a few times during the trip
- A cruise tourist who specifically selects a ship with extensive spa, beauty, and fitness amenities
- An adventure tourist who visits an eco-spa after a long day of hiking or biking
- A tour group traveler who gets a Thai massage or reflexology treatment, or visits a hammam, as part of the tour experience

Source: Global Wellness Institute





**'Slow Adventure' and 'Slow Travel'** is a new type of wellbeing tourism experience that has emerged in the last five years and is categorized as a **'destination facilitator'**

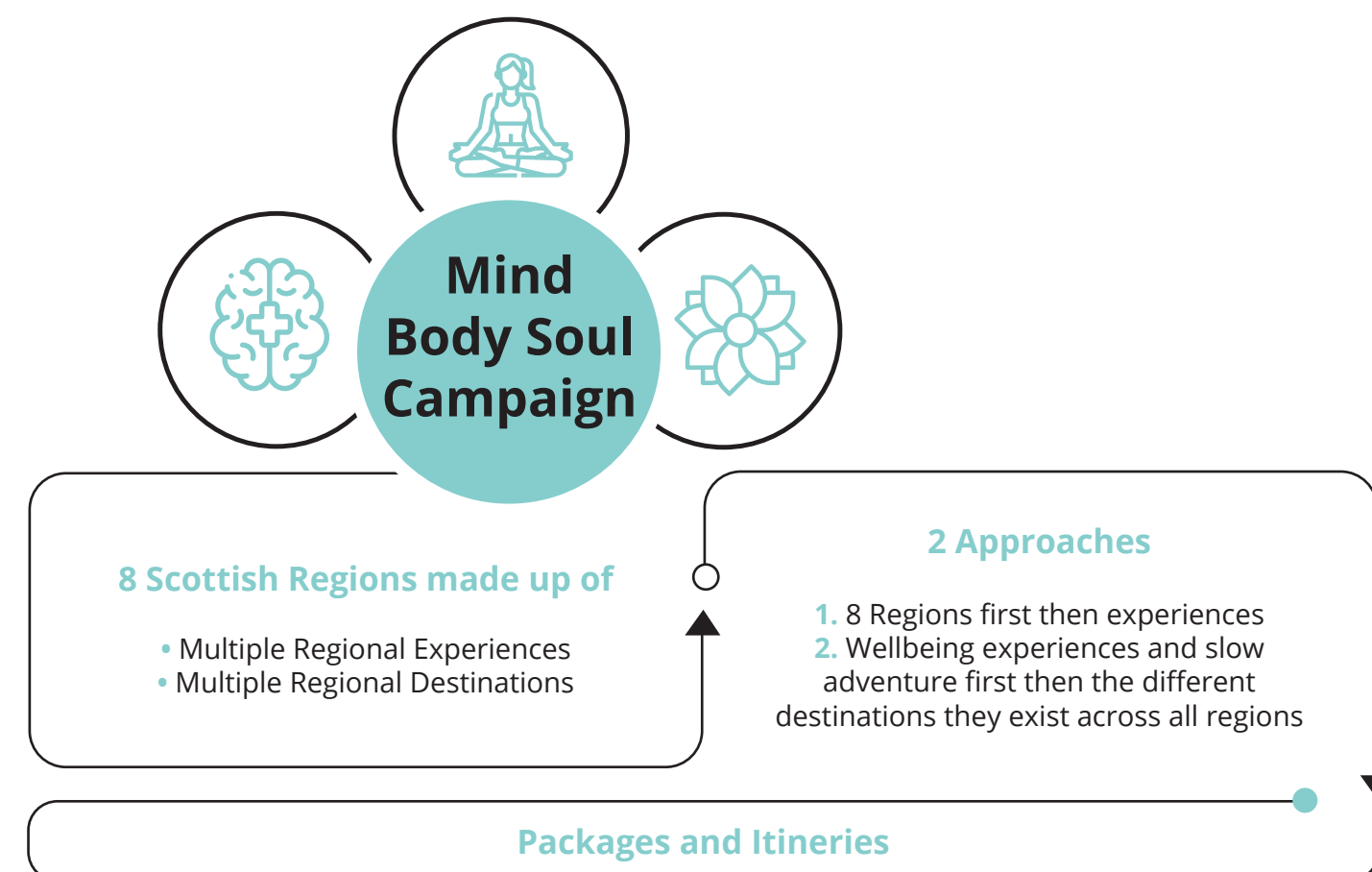
Now we understand the 'wellness traveler' we will look at Slow Adventure as a possible destination differentiation to accommodate both primary and secondary wellness tourists. Slow Adventure is a recent phenomenon that has over the past five years been identified as being a great wellbeing regional development option for most European destinations. Slow Adventure has a low impact on the environment, attracts high yield wellbeing travelers and they often stay longer and sometimes opt to work remotely.

Slow Travel tourists can be identified as short-term visitors, but the trend is growing where they are now working remotely, often working in a destination for extended periods (typically for one month). They want to explore a destination, experience personal growth, and get the most out of their wellbeing experience. As this market is set to grow wellbeing destinations should learn how to attract and work with this market. The next section assesses how Scotland (known as the Outdoor Capital of the UK) and Visit Scotland have adopted Slow Adventure as a wellbeing tourism offering to its regions

## Scotland Integrates 'Slow Adventure' and 'Wellness of Mind Body and Soul' Campaign into its Wellbeing Destinations and Regions



Scotland







## Title

**Visit Scotland integrates 'slow adventure' and 'wellness holiday experiences' into the UK's Outdoor Capital to meet the demand for 'wellness' holidays.**



## Description

Scotland is renowned for its scenic walking routes. Some of them are said to have strong spiritual energy. Scotland's national tourism organization VisitScotland launched its first online itinerary focusing on the wellness of mind, body, and spirit after a study it commissioned found almost a third of people in Great Britain consider Scotland an 'ideal destination for a wellness holiday'. (*Travel Andy News 2020*). The well-being holidays include spa hotels, quiet getaways, unusual places to stay, eco-accommodation, slow experiences, island, and coastal experiences. Focusing on themes of mind body and spirit aims to enhance and maintain visitor's happiness and stay.



## Slow Adventure Experiences

Mountain biking and cycling, water sports, golf, angling, shooting, children adventures, attractions, walking, cruising and sailing, events, foraging, skiing and snowboarding, climbing, and mountaineering...



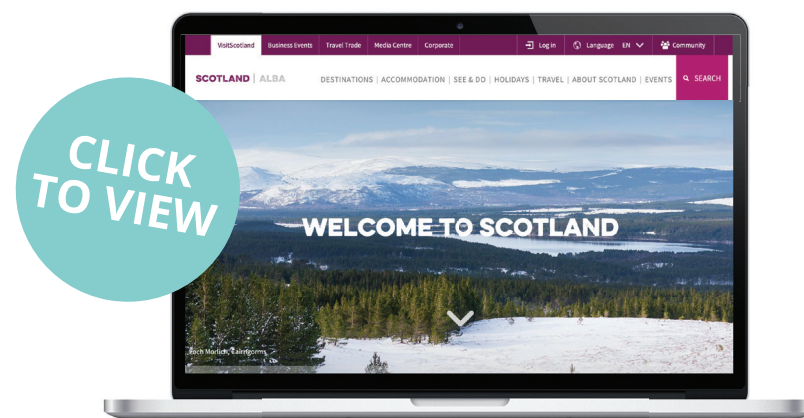
## Wellness Experiences

Relaxing retreats, museums, and galleries, spas and relaxation, explore the great outdoors, yoga retreats, historic attractions, forest bathing, unique escapes, coastal walks, self-development retreats, cooking, and eating nutritious food...



## Approach

- **Campaign Wellbeing of Mind, Body, and Soul**
- **Approach 1** Categorising According to 8 Regions Destination Characteristics and Complementary Wellbeing with Slow Adventure Experiences
- **Approach 2** Categorising Well-being with Slow Adventure Experiences Based on the Experience First then Connecting to Multiple Destinations and Regions
- **Packages and Itineraries** where SMEs focused on wellbeing experiences and slow adventure then the destinations and regions where they are located.



# VisitScotland, Scotland's official tourism organisation launched its first online guide and itinerary dedicated to health and wellbeing in May 2019



Scotland's demand for 'wellness holidays' grows (BBC News 2019) as it is seen as a 'Green getaway' for travelers who want to limit the environmental impact of their transport and visit.

Visit Scotland's research revealed that almost a third of people in Great Britain (32%) see Scotland as an ideal destination for a wellness holiday. With 11.8 million visits made to Scotland by people from across the UK, a quarter (26%) of which had already been on at least one wellness holiday. The new study also found that 31% of those surveyed say that they look after their body by being physically active and 32% take steps to look after their mental health, suggesting that they consider their mental health to be as important as their physical health.

When asked to pick their top three reasons for going on holiday or a short break in the UK, a third (33%) of people in Great Britain that had been on holiday in the UK in the last two years said they did this to 'switch off from everyday life'. This was higher if they have children in the household (39%).

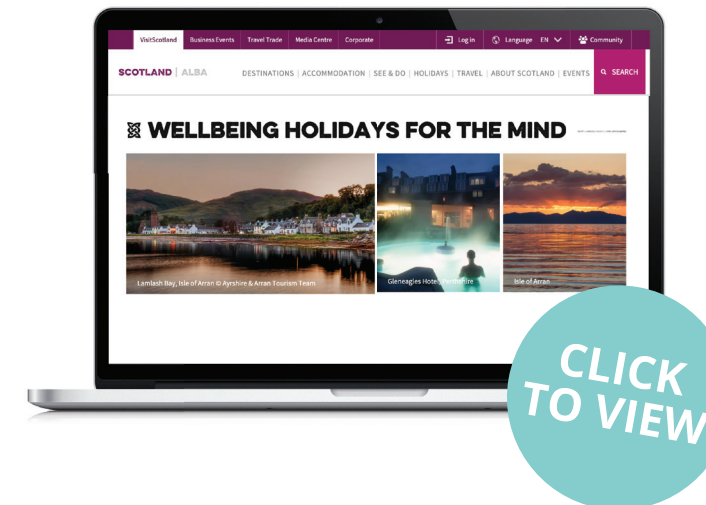


## Campaign Wellbeing of Mind, Body, and Soul

### VisitScotland Guide Example Wellbeing and Slow Adventure Experience 2 Day Trip

The enchanted forest in Pitlochry in Perthshire offers a magical escape through a display of lights and music, and aids relaxation.

Sleeping in a church (champing) is an interesting alternative activity to try out while in this country of ancient abbeys and kirks (churches).



Escape your busy everyday routine with a peaceful retreat to the Highlands, a mellow wander around a museum or gallery, or why not spend a night or two in a delightful spa? There are plenty of attractions and locations across the country that will help relax your mind and leave you feeling rejuvenated.

[\(VisitScotland\)](#)

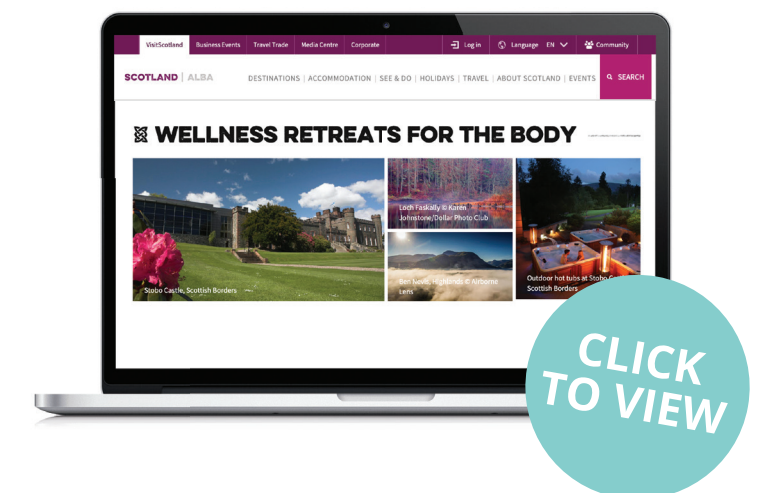


A typical day could be a retreat on the Isle of Arran for yoga, Tai Chi, and meditation, or visit the Kagyu Samye Ling Buddhist Temple in Dumfries and Galloway for a stint of Tibetan meditation. VisitScotland suggested the ancient Calanais standing stones, the Ring of Border, and historic abbeys including the famed Melrose Abbey to attract spiritual vibrations.

On day 2 you could focus on the body. Wellness seekers could hit outdoors and explore some of Scotland's 'most peaceful spots' – kayak on one of the lochs, hike up a mountain, or stroll by the beach. 'Forest bathing' to relax and re-centre' the body in one of the forest parks could also feature high on the relaxation list.

Stretch your legs, explore a tranquil forest, breathe in the crisp seaside air, or enjoy a range of watersports. Head out into the countryside and explore some of Scotland's most peaceful spots, or why not challenge yourself to climb a Munro, or chill out on a steady stroll around a picturesque loch.

[\(VisitScotland\)](#)



Explore the magical and otherworldly spots across the country that will leave you in awe and itching to uncover more. From some of the most iconic locations in Scotland, and ancient standing stones from 5,000 years ago, to peaceful forests ideal for self-reflection and the opportunity to camp in an ancient church, there are plenty of spiritual things to see and see across Scotland.

[\(VisitScotland\)](#)

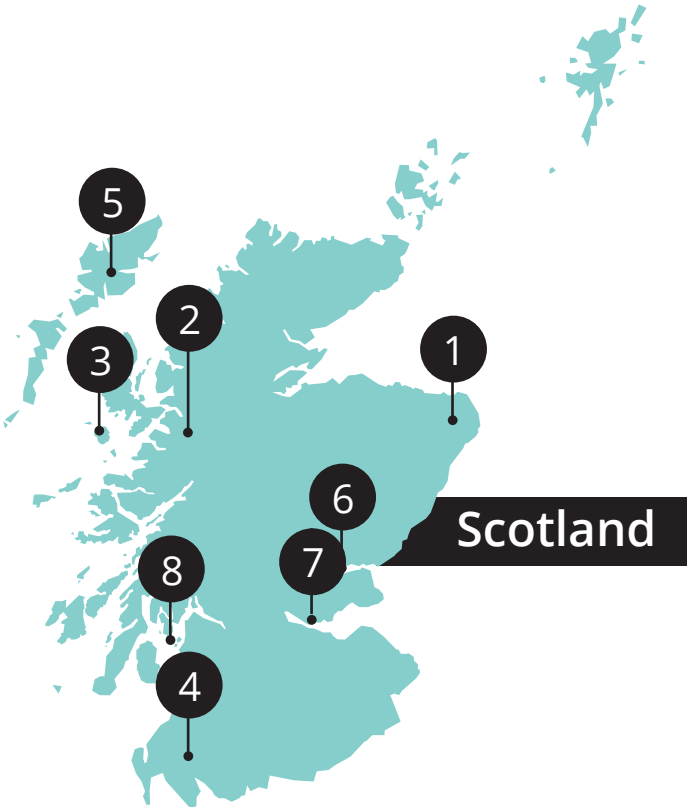




# Categorising According to 8 Regions First then the Wellbeing and Slow Adventure Experiences

The below approach focuses on the different types of regions first then what the characteristics of the destination are, then aligns the wellbeing experiences that are complementary and can be easily integrated into such destinations offerings so that there a matched relationship between destination and experiences.

Notice how each region has a decent portfolio covering at least six different experience types with the accommodation and other essential holiday components included so that the visitor has a choice, whether it is staying at a hotel or glamping; a visit to a distillery or cave, sailing or doing an activity like yoga. [\(Weblink\)](#)



	Region and Destination Characteristics	Wellbeing, Slow Adventure Experiences
1	<a href="#">Aberdeen for Coast and Culture</a>	Experiences include 8 distilleries, city center, art and comedy scenes, hotel experience, and coastal dolphin watching
2	<a href="#">Highlands for Outdoor Escapes and Wild Landscapes</a>	Experiences include Beinn Eighe (mountain with several peaks), Glen Torridon walk, geology, and quiet cottage stay.
3	<a href="#">The Small Isles for Island Hopping and Adventures to Soothe the Soul</a>	Experiences include Kinloch Castle, wildlife, sea eagles, Kilmory Bay, and harbor
4	<a href="#">Dumfries and Galloway for Glamping Experiences</a>	Experiences include countryside, rolling hills, deep forests, self-discovery, get back to basics camping and glamping (eco pod, tipi, wigwam) beside a beach or woodland

	Region and Destination Characteristics	Wellbeing, Slow Adventure Experiences
5	<a href="#">Beaches for Blissful Escapes to the Sea</a>	Experiences include sailing and island discovery
6	<a href="#">Abernethy Wellness Retreats for Digital Detox Experiences</a>	Experiences include We Love Retreat in Abernethy (cozy lodges, yoga, and meditation); EcoYoga (river, bath, or hot tub in Argyll landscapes); Moniack Mhor for a complete break.
7	<a href="#">Scottish Coastal Towns</a>	Experiences include East Neuk of Fife, caves, Elie Chain walk, Ship Inn pub, Fife Coastal Trail, and chocolate café at Pittenweem
8	<a href="#">West Island Way for less traveled long walking trail</a>	48 km, off the beaten track, takes in the entire island of Bute over two days. Unique attractions include Rothesay Castle and Mount Stuart (grand stately home)



# Categorising According to the Wellbeing and Slow Adventure Experiences First Then Where They are Located Across Scotland

The below approach focuses on the different types of well-being and slow adventure experiences first then connecting them to the destinations and regions where they exist, often involving multiple regions.



	Experience then Regions	Wellbeing, Slow Adventure Experiences
	<a href="#">Cycle the Highlands and Lowlands</a>	Dumfries and Galloway Forest Park (home to 250 lochs, forest, hills, glens), award-winning 7stanes mountain biking trails at Glentroot; Big Country Route, wilderness, eco-bothies with kayak and timber hot tub
	<a href="#">Twilight Walk on Orkney</a>	'White nights of Orkney, simmer dim of Shetland, island experiences, sunsets, Brough of Birsay Causeway, Pictish and Norse ruins, Stevenson lighthouse.
	<a href="#">Spa Experience on Wheels</a>	Luxury rail journey through the countryside, luxury spa treatments, constructed from sustainable wood and twin treatment rooms
	<a href="#">Cruise on the Caledonian Canal</a>	Traditional barge break, majestic Great Glen, disembark and explore, walks, bike rides, and kayak excursions
	<a href="#">Forage for Super on the Highlands</a>	Hunter-gatherer experience with Wildwood Bushcraft, farm stay, expert guide, create own naturally, a nutritious and sustainable feast cooked over a campfire, courses at Bluebell Croft e.g. home smoking

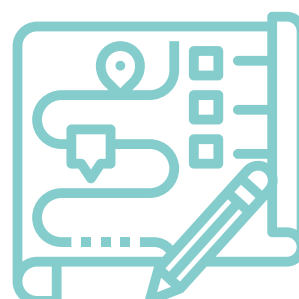
	Experience then Regions	Wellbeing, Slow Adventure Experiences
	<a href="#">Midnight Golf on Shetland</a>	18 hole golf course, competitions, breathtaking coastal scenery, Shetland Lake Experience (7-day trip led by local naturalists exploring archipelagos wildlife)
	<a href="#">Life the Rural Life</a>	Scottish working farm, centuries-old accommodation farmhouse, working crops, and livestock, grow local produce, home-cooked meals, courses, family-friendly activities, driving and cycling routes, dramatic Aberdeenshire coast, whiskey rich valleys of Speyside
	<a href="#">Follow the Affric Kintail Way</a>	Walk/cycle/run route less traveled launched in 2015, 44 miles across the west coast, dramatic glens Glen Affric, Old Drivers RoD, pine forests, serene lochs, and lush glens, Beinn Fhada and Five Sisters peaks
	<a href="#">Cruise to St Kilda</a>	Sail cluster of four islands, sheer cliffs on Atlantic, UNESCO World Heritage Site, Island Cruising with MV Cuma for a 6-day cruise, explore Scarp, Taransay, Monarch and Flannan Islands, no set itinerary, whale, seal, and dolphin watching and the beautiful Hebrides



# How Scottish Wellbeing Tourism SMEs Built Packages and Itineraries Around Their Wellbeing And Slow Adventure Experiences, Then Focusing on the Destinations and Regions they are located.

Building a well-being package can be complex involving the destination, experiences in demand, timing, price points, duration, extras, facilities, communication functions, and other components are perfectly developed and aligned. Well-being and slow adventure packages are easier to build in Scotland due to its variety of stunning natural destinations and that it has a multitude of retreat locations and facilities. The packages below can be relocated or rotated as many involved learned wellbeing skills and techniques, not to a specific location or destination. (Full Itineraries and Packages here)

- 8 Days —● Fitness Boot Camp to slimming and fitness in the countryside
- 5 Days —● 1 on 1 Mindfulness
- 3 Days —● Private Yoga Retreat in National Park
- 3 Days —● Eco Fram Stay and Yoga Retreat
- 3 Days —● Wellness and Detox
- 2 Days —● Healing Sanctuary
- 4 Days —● Soul Awakening Vegan Retreat
- 3 Days —● Luxurious Glamping and Yoga
- 3 Days —● Mindful Art Retreat
- 22 Days —● Detox Retreat in the Countryside



## OPPORTUNITY 7

### Diversification of Experiences

Already Established Wellbeing Experiences Need to Continually Adapt and Diversify to Remain Competitive and Up to Date with Future Wellness Economy Trends



**Spas have managed to survive in a highly competitive and turbulent tourism market by reorientating themselves.**

Today's spa tourism has taken over the image of the original and classic "thermals", along with a wide range of different services, where water due to its natural relationship with the essence of the human being, it remains one of the basic elements, although it is used in different ways, with different objectives and with the new techniques' (Gustavo, 2010). On the same note, a "spa" experience can be based only on one of the four elements of wellness (physical activity, spiritual activity, personal relaxation, and a healthy and natural diet), wellness cannot function if missing even one of these elements.

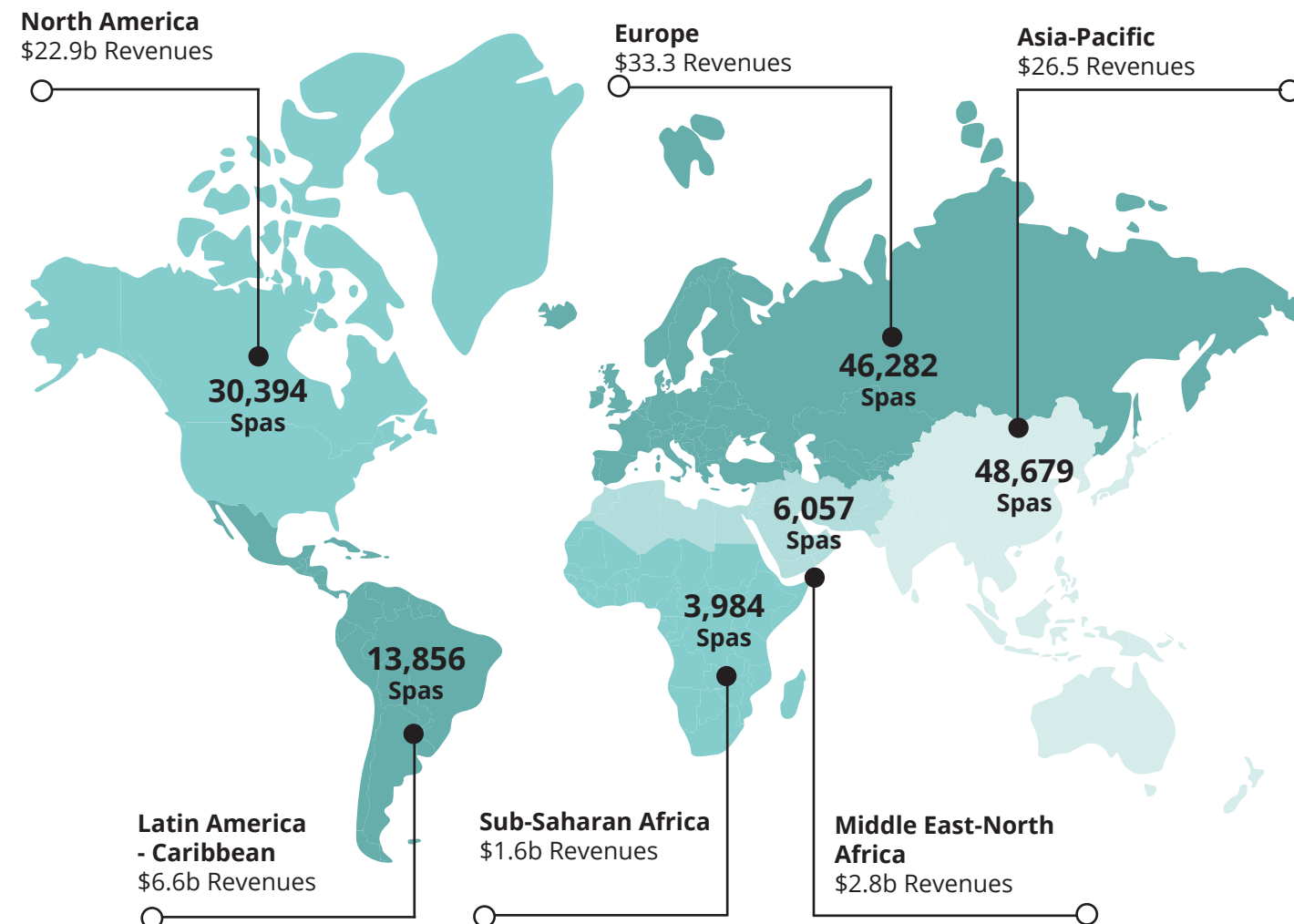


## Spa Industry

The spa sector has been growing by 9.9 percent annually from 2015–2017, and it is projected to reach \$128 billion in 2022. In 2017, there were over 149,000 spas, earning \$93.6 billion in revenues and employing nearly 2.5 million workers. The top five markets are United States (\$20.8 billion), China (\$8.2 billion), Germany (\$6.7 billion), Japan (\$5.7 billion), and France (\$3.6 billion). GWI projects that in order to staff the growing global spa business, the industry will need an additional 300,000 trained spa therapists and 54,000 experienced spa managers/directors (above the current level) by 2022. GWI Global Wellness Economy Monitor (released in October 2018, with data for 2017).

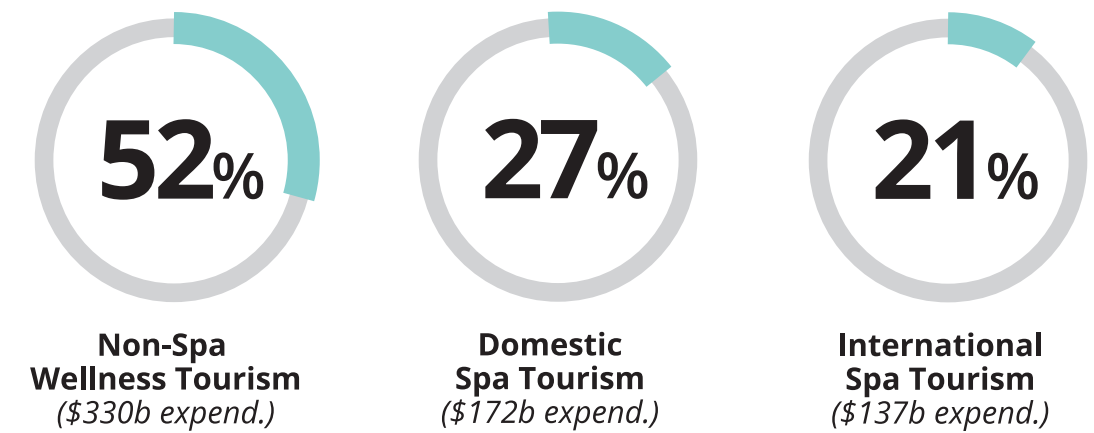
### Spa Facilities by Region, 2017

Number of spas and spa facility revenues



Global Wellness Institute

## Spa Tourism Represents About 48% of Global Wellness Tourism Expenditures

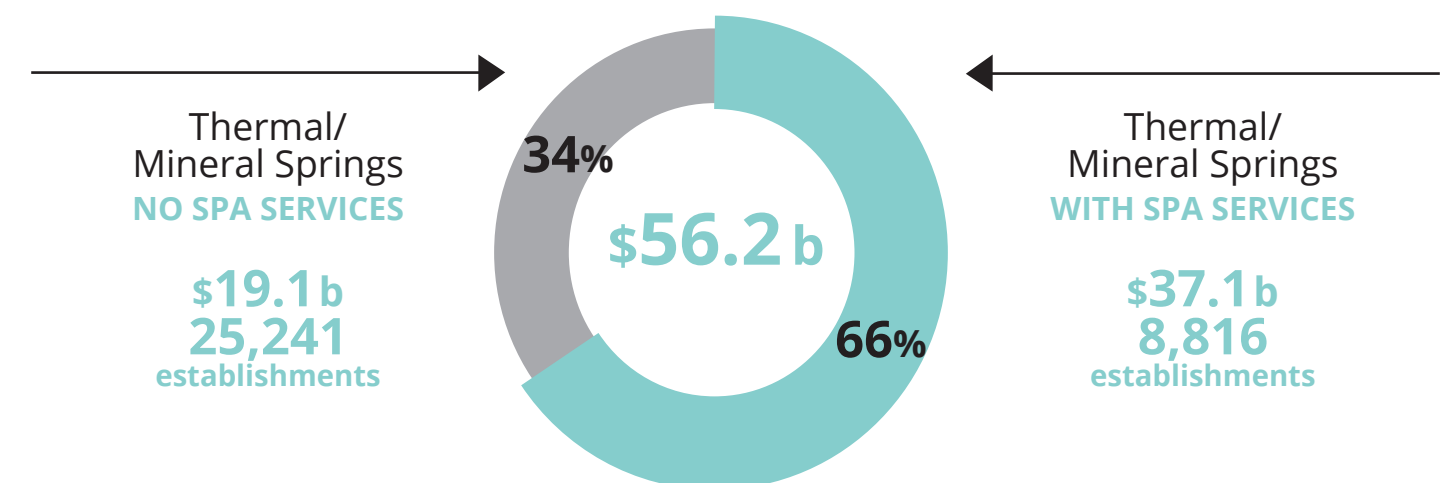


Global Wellness Institute

## Thermal/Mineral Springs

This sector has been growing by 4.9 percent annually from 2015–2017, and it is projected to reach \$77 billion in 2022. There are an estimated 34,057 thermal/mineral springs establishments operating in 127 countries. Thermal/mineral springs businesses earned \$56.2 billion in revenues in 2017, and they employed an estimated 1.8 million workers. The thermal/mineral springs industry is heavily concentrated in Asia-Pacific and Europe, which together account for 95 percent of industry revenues and 94 percent of establishments. Top markets include China (\$17.5 billion), Japan (\$12.8 billion), and Germany (\$7.2 billion). [\(Full report here\)](#)

### Thermal/Mineral Springs Industry in 2017





**As the wellness industry evolves spas, mineral and thermal springs will need to continually adapt and diversify to evolve.**

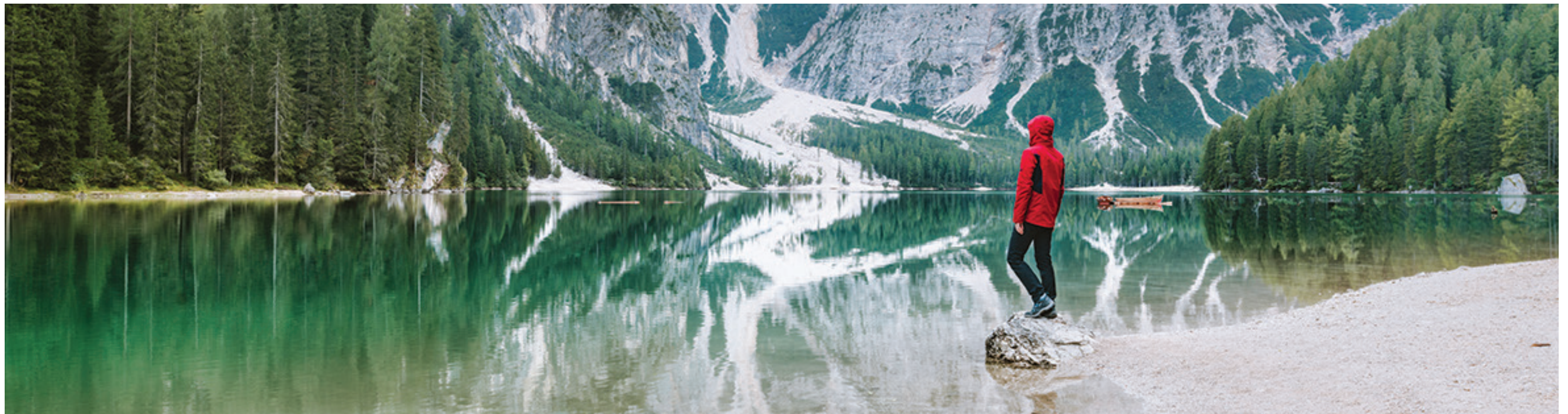
Spas realise the importance of getting on the trend of aligning their offering with wellness lifestyles providing more diversity and choices to their customers. Some are expanding along with a full range of holistic health and preventive services that extend to nutritional advice, sleep therapy, sound therapy, gut microbe analysis, energy healing, salt caves, beauty treatments, reiki, flotation tanks, and so forth. Others are adopting wellness and healing modalities from different traditions and cultures: Finnish saunas, Japanese onsens, Turkish hammams, Traditional Chinese Medicine, and Ayurveda are no longer confined to their country or region of origin, or niche spas.

Spas are also responding to a rising need for mental wellness and stress reduction, along with growing interest in igniting and supporting behavioral change that will lead to a more healthful, balanced, and fulfilled life for guests outside of the spa. To complement body/energy work, many spas are beginning to offer more personalized and tailored services, such as nutritional assessments, individual counseling/advice, holistic personal wellness plans, coaching, etc. In the same vein which is a key developmental trend is integrating outdoor activities (hiking, cycling, walking...) slow adventure (kayaking, canoeing, forageing...) culture, heritage, entertainment, festivals and events, local community experiences and so many more that are in tune with wellbeing.

**Many spas are undergoing redesign/refurbishments of their facilities and offerings, reflecting emerging needs and preferences...**

...such as the desire for the community (e.g., creating club-like settings and atmospheres, or group programs and classes that facilitate connections among guests); intergenerational wellness experiences (e.g., “better-ageing” modalities; kids/teen spa treatments, classes, and activities); water for healing (e.g., hydrotherapy, Watsu, therapeutic thermal/mineral spring bathing and treatments); and using nature to enhance our sense of wellbeing (e.g., forest bathing; use of natural, organic, and local ingredients; biophilic design of facilities). Let us have a closer look at the Spa and Thermal/Mineral Springs Sectors as a Key Decision Driver for tourism markets.

It is also true that regions who do not have existing spa, thermal or mineral spring experiences can adopt the same but need to develop both their ‘hard wellness’ and ‘soft wellness offerings; **‘hard wellness’** or manmade facilities; (saunas, hot tubs with healing minerals, retreats, relaxing spaces) and adopt **‘soft wellness’**; spa treatments (facials, massages) healing practices; (Reiki, acupuncture, reflexology) teach classes; (nutritional cooking, yoga, tai chi) implement wellbeing ethics and practices; (environmentally conscious to recycle, reuse water, give back to society) which all attribute to spa and wellbeing experience development. The next section is an example of how Slovenia has adopted and diversified its older wellbeing spa, thermal and mineral springs offerings into more ‘wellbeing’ and ‘wellness’ experiences.







## 'HARD' WELLNESS

- Treatment rooms
- Beauty clinic / salon
- Gym
- Spa Facilities (swimming pool, hydrotherapy pool, jacuzzi, hot tub, sauna, steam room, experience showers, hammam)

Hotel brands that are known for their best in class spa assets include:

- Six Senses
- Aman
- Banyan Tree



## 'SOFT' WELLNESS

- Wellness experiences (yoga, classes, running groups)
- Product choices (in spas and bedrooms)
- Environmental considerations (attitude to recycling/re-using, water consumption)
- Physical environment (air quality and temperature, natural light)
- Ambience and architectural design (impact of buildings on mental health)
- Health and diet considerations in food and beverage provision throughout (restaurant, bar, in-spa, within bedrooms)
- Self-care (provision of apps for mental health/relaxation, yoga mats with on-line tutorials)

Hotels that have adopted an asset-light approach to wellness include:

- Even Hotels by IHG (in-room fitness equipment and workout videos, health food restaurants)
- Locke by SACO (curated local activities and free yoga classes)

*Avison Young, The Future of Wellness in Hospitality*



# Slovenia Diversifies its Well-Developed Spa and Pampering Industry into Unforgettable Wellbeing Experiences



## Title

**Slovenia's Top Wellness Experiences are Diversifying into Different Unforgettable Wellness Treatments**



## Description

**Slovenia, The Land of Water, and Spas.** Slovenia has spectacular mountains, green forests, emerald rivers, a diverse underground world, and charming coast are combined with a rich history, picturesque villages, and lively cities. Slovenia is one of the most biologically diverse countries in the world with over half of the country covered in forests. Its thermal and mineral springs are a source of health and well-being. **Thermal Pannonian Slovenia** alone boasts as many as **13 natural health resorts** near thermal springs amid wine-growing hills.



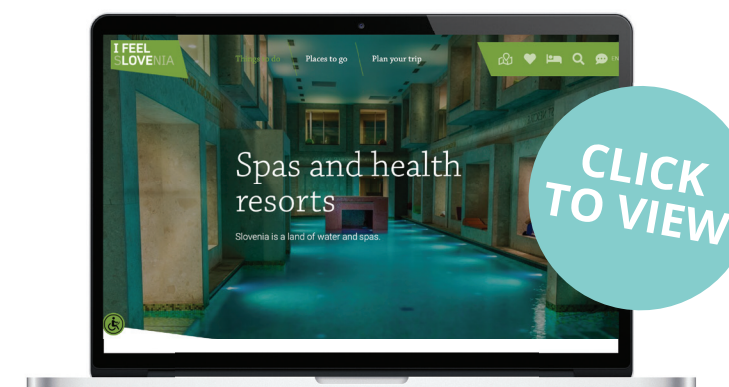
## Spa Statistics

Due to the wide range, in 2012 the Slovenian spa resorts have recorded 786,700 visitors and 3,090,900 overnight stays (in 2000, there were 430,500 visitors and 2,117,900 overnight stays). Foreign guests account for 43% of tourist turnover. Most foreign visitors come from Italy, Austria, and Germany (Statistical Office of the Republic of Slovenia, Statistical Yearbook 2013).



## Approach

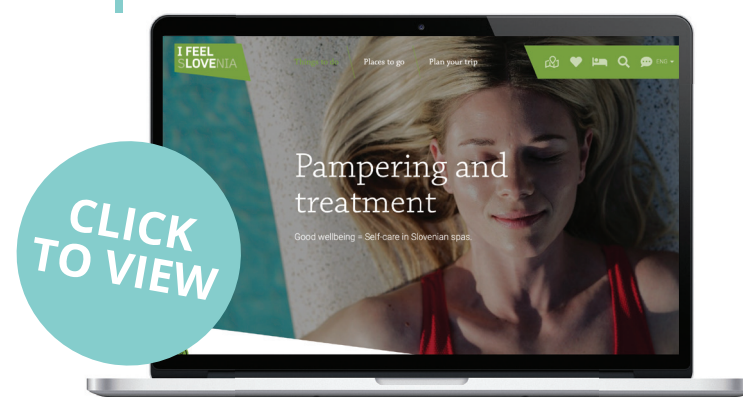
Integrated existing sauna, mineral springs, thermal springs, spas, and pampering experiences into the new 'Selfness' wellness campaign. They also diversified by developing new and unique sauna and pampering wellness experiences.





# Slovenian wellness with pampering is relaxation and treatment programs now integrated into 'Selfness Programmes'.

Well-being visitors experience a lifestyle that puts physical and mental health and good energy at the center. They get to relax with wellness experiences and invigorate themselves with selfness discoveries.



Five key areas are included in the **Selfness Campaign** focuses on;

**Relaxation, comfort** various massages and baths, yoga practice, pilates, and tai chi. Visitors get to relax in beautiful green environments of Slovenian spas and health resorts, which are often a great location for relaxation exercises. Wellness experiences include special laughter yoga, breathing, and relaxation exercises on the seashore, barefoot walks on sensory trails, and energy points.

**Spirit & mind** social and cultural events, sightseeing, workshops, lectures, etc. Activities in nature where guests can hire poles for Nordic walking and learn how to do this activity on special trails with an instructor. You can also hire a bike and outdoor facilities for various activities that are available in the vicinity. Seven health resorts are in the vicinity of golf courses.

**Health** wellness services associated with traditional medicine and beauty clinics

**Vital cuisine** a selection of various vegetarian and macrobiotic diets

**Beauty and cosmetics** services provided in beauty centers, cosmetic massages, pedicure, manicure, and hairdressing salons

## New and Different Pampering Wellness Techniques

- 01** **Glacier Water** Enjoy the beneficial pampering in glacier water from underground glacier lakes at [Špik Hotel in Gozd Martuljek](#). Massage with glacier water or swim in heated glacier water to moisten, refresh, and soothe your skin.
- 02** **Feel the healing power of the herbs** [Thermalium wellness](#) make nourishing oils for peeling treatments, facials, and massages from the local meadow
- 03** **Beer pampering** in [Thermana Laško](#), where you can feel the positive effects of beer ingredients yourself. Calms the body, nourishes the skin, and maintains its vitality.
- 04** **Honey Luxury for wellbeing** Apiculture or beeswax therapy helps to treat rheumatic stimulates blood circulation, detoxifies, boosts your immune system, and youthful appearance.
- 05** **Pohorje Peat for Health and Wellbeing** in the forests of the Pohorje Hills in highland bogs the unique Pehorje peat has a number of beneficial effects on your health and well-being.
- 06** **A wine sauna** at the Arena Hotel in Maribor and [Terme Ptuj spa](#) relax in specially adapted wine sauna barrels. Treat yourself to a massage with wine oil. Spend a night in a wine barrel in the [Wine Village of the Terme Ptuj Spa](#)





## New and Different Sauna Wellness Experiences

### Slovenia has over 130 spas and resorts.

It has so many different types of wellness experiences when it comes to saunas. The main purpose of a sauna is to cause sweating and overheating of the body, removing from the body harmful substances, balancing the metabolism, cleansing the skin, strengthening the immune system, improving sleep, and mood.



**Ice Sauna** First you need to start with ice and run it over your body to open up your pores before you enter the sauna and your skin gets better cleansing.

**Honey Saunas** (Terme Topolšica Spa, Thermana Laško Spa)

**Chocolate Saunas** (Atlantis Water City, Terme Paradiso Spa)

**Wine Sauna** (Arena Hotel at Terme Maribor Spa)

**Piran Salt Saunas** (Strunjan and Terme Portorož Spa)

**Pohorje Herb Saunas** (Terme Zreče Spa, Terme Snovik Spa)

**Mud Saunas** (Terme Topolšica Spa, Terme Ptuj Spa)

**Sanitarium or Biosauna Saunas** A combination of a sauna and steam room makes you feel like you are in a tropical rain forest (Terme Olimia Spa and Rogaška Wellness Centre)

**Crystal Saunas** can intense the experience of serious medical experiences by using the effects of negative ions. (Terme Čatež Spa, Terme Lendava Spa, and Terme Dobrna Spa)

**Chromotheraies in Saunas** using light and colours to impact your health and wellness. Chromotherapy is colour therapy. (Terme Dobrna Spa, Rimske Terme Spa)

**Volcanic Sauna** at Terme Banovci Spa

**Roman Sauna or Caldarium Sauna** intended for socialising, conversations, and preparing to continue with the sauna experience. The temperature is considerably lower than in other saunas. (Terme Ptuj Spa and at Rimske Terme Spa)

**Japanese Sweat Bath** At Dolenjske Toplice Spa, you can experience wellness treatments that use a traditional Japanese method. A Japanese sweat bath will calm you and help you on your journey to inner balance.

**Ice Cave** for cooling off after a sauna (Terme Portorož Spa and Terme Ptuj Spa)

## OPPORTUNITY 8

### Exploit a New Niche Traveler

Since the Wellness Revolution and Economy Remote Wellness Working Has Taken Off!

Now more and more people are both traveling and working away from home. The 'Remote Wellness Traveler/Worker' is a new niche market that is high yield, long-staying, low environmental impact, and usually partakes in wellbeing, travel, adventure, and slow adventure experiences.



### Wellbeing Tourism and Slow Adventure is a New Way to Travel, Work and Look After Your Wellness.

Well-being tourism destinations especially through slow adventure are bringing people back to a state of mental and physical equilibrium while they work. Regions need to continuously identify what drives their core customers and seek new ways out how to distinguish themselves from competitors in this evolving landscape. Remote working and living away markets are growing increasingly popular. Remote working is a response to the cult of speed and as a vehicle for engaging in deep, immersive, and more meaningful experiences in the outdoors *Farkic and Taylor (2019)*. Rush-free rural settings with nature and beautiful landscapes motivated by the search for relaxation, comfort, and escape offer an ideal environment for merging the perfect wellness and working lifestyle.

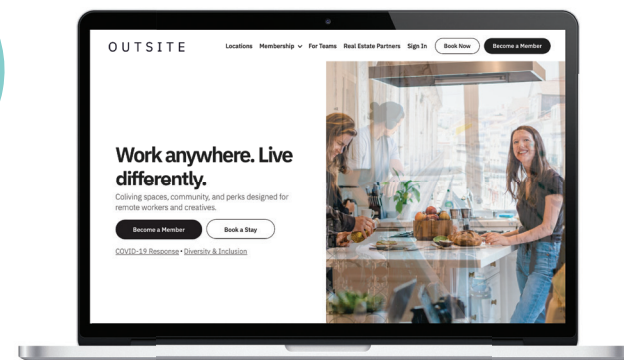




“Because of our newfound emphasis on ‘self-care’, millennials to boomers are looking to take their wellness lifestyles with them when they travel for business or pleasure. Additionally, in smaller but growing numbers, consumers are looking to use their vacation or holiday time to plan quick or extended getaways with a specific wellness-focus in mind”

Anne Dimon  
President of Wellness Tourism Association

For those who want to experience a country for a longer duration than the standard vacation, companies such as **Roam** (design unique customized travel experiences), **Outsite** (co-living spaces, community, and perks for remote workers), **The Remote Trip** (work remote, travel the world and work on your own terms), and others are offering a combination of coworking, co-living, and travel, enabling people to experience other countries and cultures while working and living with like-minded individuals for a week, a month, or longer.



Many provide on-site wellness/fitness amenities, yoga classes, meditation, and other community events. The rise of wellness tourism is enticing new entrants into the market, as well as new forms of competition and partnerships. The integration of business areas along a continuum from hospitality to wellness and healthy lifestyles will continue to gather momentum. (GWI Full report [here](#))

Bring that core customer further again and fine-tune to the female segment. Some **coworking travel groups**, such as **Behere** and **Hera Hub**, cater exclusively to women, helping them to maintain their health and wellness routines while safely exploring new cities and settings across the globe.

- **Behere** helps clients find short term apartments, workspaces, local gyms, and fitness studios around the world. Everything is booked in one place, making travel easier.
- **Hera Hub** a female-focused coworking space and business accelerator have created spa-inspired environments within its shared spaces.







## Title

**Michael Youngblood from Unsettled gives his perspective on the slow tourism trend**



## Description

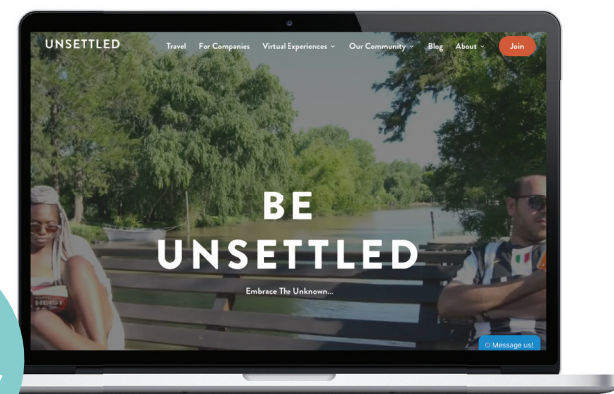
**Be Unsettled** is a global community of independent and remote professionals who live, work, and travel differently.

1. First, the number of people who work remotely is growing. Digital nomads make a full-time lifestyle out of it. Imagine how many more people can work and live from a single location for one month or two weeks at a time.
1. Second, there is an overlooked group of middle-aged professionals who are traveling for different reasons today. They're traveling during transitional periods when they are between jobs, contracts, or careers.
3. Third, in the United States alone, 10,000 people retire every day, and they are healthier, wealthier, and younger than any retiree generation in history. I think that one of the largest overlooked trends in the number of 50 – 60 - year - olds who are embracing slower, more adventurous international travel. This group no longer wants traditional "tour travel." They are looking to feel young, interact with people of all ages, and challenge themselves and think about what they want out of this next stage of life' (Full Report [here](#))



*We've found three core trends are driving the popularity of our types of trips."*

*Michael Youngblood - Unsettled*



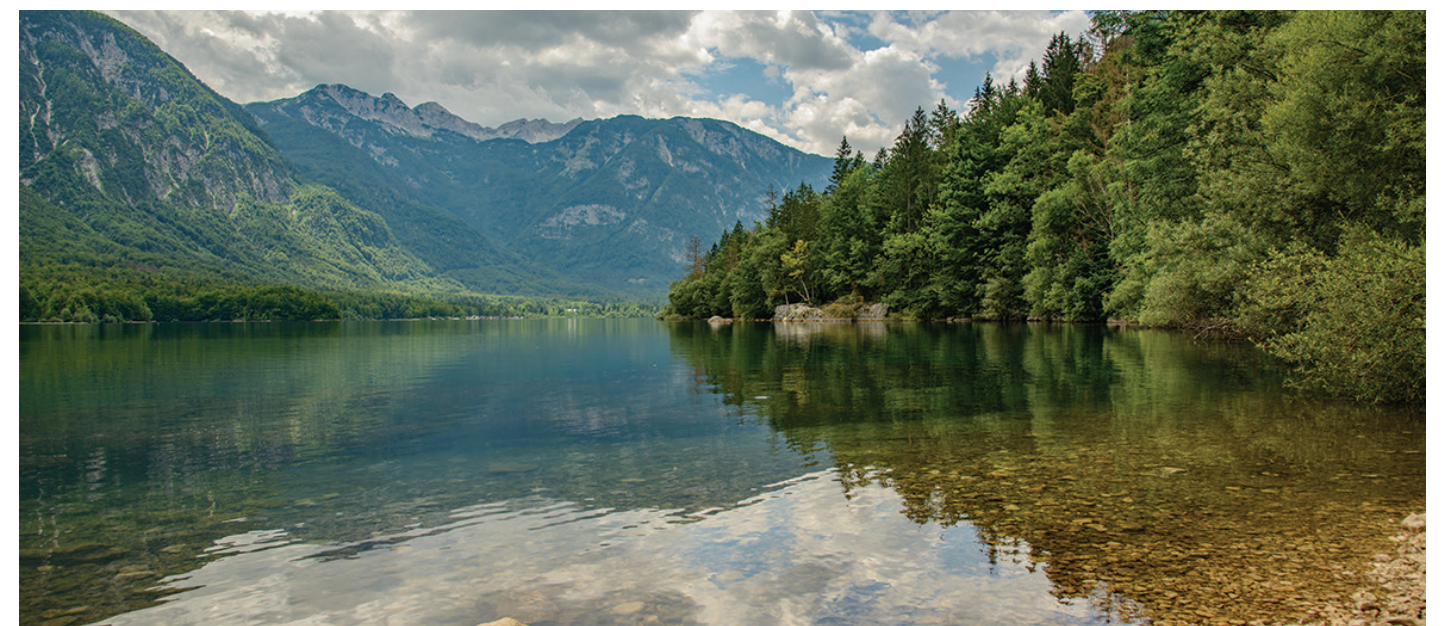
CLICK  
TO VIEW

## OPPORTUNITY 9

### Wellbeing Tourism Offers New Types of Festival and Event Experiences

Wellbeing Festivals and Events are Key to Stimulating the Wellbeing Tourism and Wellness Economy

Well-being community-based and regional festivals and events provide a range of benefits to regions combating seasonality, diversifying the wellbeing offering, bringing communities together, stimulating economies, creating jobs, spreading tourism multiplier effects, increasing positive destination reputation and so much more.



**Festivals and events are one of the fastest-growing forms of tourism and revitalise rural and local economies.**

They can revolutionise regions and communities in a multitude of ways engaging in wellbeing tourism festivals and events both economically and socially. They are a great way to combat seasonality, stimulate tourism regions during lull periods, and attract tourists and visitors at regional, national, and international levels. Events help to capture attention and promote attractions and make it possible to maximize and rationalize the use of certain spaces. Events help to capture attention and promote other wellbeing attractions and other tourism offerings.





*'In recent years, the adventure sports sector in Ireland has successfully carved out a growing niche for thousands of participants keen to test their stamina in a variety of endurance events tailored to all ages and fitness levels. Set over courses that encompass cycling, mountain running, trail hiking and kayaking, they dot the entire country and operate on a year-round basis. Throughout the year, fitness options of varying degrees are available at events such as the Moonlight Challenge, Emerald Enduro Series, Race2Glory, Tough Mudder, and Gaelforce West, to name but a few from the constantly growing list of activity events.'*

Russell Walters, Director  
Adventure Travel Trade Association



Ireland has successfully carved out a growing niche for thousands of participants to a series of well-being slow pace, fast-paced and alternative events. Below we have captured 3 different types of festivals and events in different Irish regions that have well-being integral to their development. Some of the events relocate to different regions yearly others are identified by the unique settings they are situated.

**Beast Adventure Race** one of the most challenging adventure races attracting hundreds of teams across Europe. Promotes Ireland as a unique adventure sports destination by moving location and course every year and will be joining the Adventure Racing European Series



*'Now the Beast has grown too big to contain and has broken free. Free to roam the entire island of Ireland as it seeks the best locations and best challenges to push our competitors to their limits. Who knows where the Beast will take us next'*

Russell Walters, Director  
Adventure Travel Trade Association

### Gaelforce West, Croagh Patrick, Co. Mayo

Is one of the most iconic adventure races in Ireland attracting hundreds every year. A multi-sport event; run, kayak, and cycle across the wild rugged West Coast of Ireland.

### EarthSong, Glendree, Co.Clare

A two-month unique type of music festival that is much like a summer camp for adults. There is no alcohol, late-night noise, or electric music. Earthsong is held in the secluded fields of Glendree and was created to help its attendees reconnect with nature. Patrons can enjoy days full of yoga, chanting, drum circles, dancing, indigenous songs from foreign cultures, and more.



Croagh Patrick, Co. Mayo, Ireland Photo Credit: Artur Ilkow

**Wellness tourism is the powerful intersection of two large and growing industries:**



**TOURISM INDUSTRY**



**WELLNESS INDUSTRY**

Global Wellness Institute



## 06

## Conclusion



There is perhaps no bigger megatrend in the travel industry today than wellness. Given the wellness economy boom outside of the travel industry, it only makes sense that it would eventually become a hot topic

Even though it has gained newfound attention, wellness has long been a key motivator for travel and an important part of the travel experience. Today, however, wellness travel is manifesting in new and different ways than in the past, driven by the demands of increasingly well-being minded travelers.

Travel industry stakeholders, SMEs, governments, and regions looking to attract wellness-minded consumers need to understand what wellness tourism means and the opportunities available to successfully find a place within it. As the enthusiasm builds and the well-being market grows for successful regional development governments, regional and destination managers, tourism support structures, policies, and communities need to manage it sustainably and responsibly.

Well-being travelers place the destination and its inhabitants in front of mind. The opportunities identified in this resource bring economical and sustainable growth models but also bear in mind a host of benefits and important challenges on the communities and natural resources they reside in. The 'Opportunities' demonstrate how regional development can incorporate different holistic and carefully considered approaches. As each country and region is unique the opportunities identified will vary depending according to each destinations location, unique resources, existing wellbeing experiences, opportunities to diversify and differentiate, and how the sector is supported by government policy and support structures. Not all of the opportunity approaches will be a fit but the models can be adapted and modified to suit your specific country, region, or destination development potential.



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