

destinations : wellbeing tourism

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IO2 – Wellbeing Tourism Destination Action Plan

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1. Introduction

Although Scotland may not be top of mind as a wellness destination, it has real potential to take advantage of the growing wellness travel market. Scotland has plenty of great outdoor scenery and walks, peaceful rural areas and coastal retreats, rewarding cultural hubs in towns and cities, authentic food and drink experiences, and an existing range of spa resorts and activity centres. It can therefore appeal to a wide range of wellness seekers (VisitScotland, 2019).

Wellbeing tourism represents a real opportunity for tourism businesses in the Highlands. It is estimated that wellness visitors spend, on average, 178% more than the average domestic tourist (Global Wellness Institute, 2017), with business opportunities for catering for both these high-spending tourists for whom wellness activities are the principal motivation for their stay, and the other travellers for whom some form of wellbeing or wellness activity is part of their visit.

A *destination action plan* identifies the priority strategies and actions that, if implemented, will enhance the competitiveness of the region as a primary visitor destination. It provides a framework and direction for delivering new and improved tourism experiences across the region. It has the potential to drive growth in the tourism sector and its contribution to the regional economy (Raglan Chamber, 2016).

The aim of this action plan is to identify:

- Key objectives for the sector
- Strengths and weaknesses of and opportunities for wellbeing tourism in the Highlands
- Core priorities to facilitate the development of wellbeing tourism

This document complements the IO2 wellbeing tourism audit and destination map for Scotland and the resources developed in IO1:

- Exploiting Regional Opportunities
- Creating a Wellbeing Region
- Festivals and Events

2. Objectives for the Wellbeing Tourism Sector

Although Scotland has a long established spa tourism sector it is considered to have a relatively nascent wellbeing tourism offer, albeit one that had a well-recognised potential; witness the cornucopia of tourism trend documents produced by VisitScotland that highlight the appeal of wellbeing to contemporary consumers. Accordingly the objectives for the sector are suggested as:

- To increase consumer awareness of Scotland as an appealing wellbeing destination.
- To increase the number of business providing wellbeing experiences.
- To increase the cross-sectoral collaboration in the creation of wellbeing tourism experiences.

3. The Strengths and Challenges of, and Opportunities for, the Wellbeing Tourism Sector

What are the Strengths?

- **Consumer awareness.** For a wide range of reasons Scotland is a destination on the 'radar' of many consumers.
- **The landscape** of the Highlands and islands with the incredible diversity of mountain and coastal landscapes.
- **Ease of access from many markets.** Scotland is very accessible both domestically and internationally, although internal travel options in the highlands are relatively limited.
- **National and international marketing.** VisitScotland is a strong organization with a very large marketing budget, organizing regular events and 'themed years'.
- **Culture and heritage.** Scotland has a wonderfully rich and engaging cultural heritage.
- **One of the quietest places in Europe.** The Highland and islands are sparsely populated outside of the only city in the region and offer great opportunities for escape.
- **Dark skies.** That sparse population means many areas have dark sky potential. The region is home to one Dark Sky Park and the designation of others is being explored.
- **A range of wellbeing offerings.** There is a well-established, if limited, wellness/spa industry, while the range of wellbeing businesses is steadily increasing, across a wide range of sub-sectors from forest bathing and yoga to tree climbing and foraging.

What are the Challenges?

- **COVID-19.** The UK has been one of the countries hardest hit by the pandemic and has a potentially devastating effect on the tourism sector.
- **Wellbeing image.** The country is probably not at the top of many people's minds as a wellbeing destination.
- **Peripherality.** Although getting to Scotland is relatively easy, getting around the Highlands and islands is time-consuming and difficult without a motor vehicle.
- **Inconsistent weather.** Scotland is a 'four seasons in one day' country and while this may attract some tourists it is equally off-putting to many others.
- **Relatively undeveloped sector.** Compared to many other destinations the wellbeing sector is quite limited in both breadth and depth.
- **Limited sectoral collaboration.** Although there are some notable exceptions there is limited evidence of business clustering to offer wellbeing tourism experiences.
- **Perception as an expensive destination.** The UK as a whole is probably still perceived by

many consumer markets to be a relatively expensive destination, although currency fluctuations, after the Brexit announcement for example, have eroded this to an extent.

- **Consumer indifference.** General unawareness about wellbeing as a holiday experience, both in terms of primary purpose and as a secondary activity, serves to limit the potential market currently.
- **Leaving the European Union.** Brexit has created a number of issues in terms of both the labour supply for example and overtourism issues at a number of well-known visitor sites.
- **Brand development.** Discussions with businesses suggest that there is work to be done to increase the brand awareness of wellbeing tourism in the Highlands and islands, both for consumers and businesses.

What are the Opportunities?

- **Post-COVID change in attitudes towards tourism.** Much has been written about the potential for a sizeable shift in consumer attitudes towards a more responsible, sustainable tourism, which wellbeing tourism businesses can take advantage of.
- **Wellbeing tourists are relatively high-spending.** As discussed above, the wellbeing consumer tourism spend is considerably higher than the average tourist's.
- **Wellbeing is a growing market.** Greater awareness of the importance of physical and mental wellbeing, exacerbated by the confines of COVID lockdowns, should increase the sector's opportunities.
- **A diverse range of elements.** Spas, walking, nature and food provenance can all contribute to a wellbeing tourism experience.
- **Business clustering.** The benefits of working with other businesses to increase the range of experiences offered and being able to pool marketing efforts for example are well-known and offer opportunities for business development.
- **Cross-sectoral collaboration.** Likewise, opportunities exist to collaborate with other related sectors, such as food and drink, to offer different types of wellbeing tourism packages.
- **Wellbeing as a part of a holiday.** Being a wellbeing tourist doesn't just mean travelling to an area for a wellness holiday or break – half-day or day-long experiences can tap into a much wider consumer market.
- **'Còsagach' as a driver.** Còsagach is a Gaelic word which has been identified by VisitScotland as a rival lifestyle trend to hygge, appealing to consumer notions of coziness in times of inclement weather for example (The Guardian, 2018).
- **Broadening the scope of wellbeing tourism** will certainly bring a new understanding of its potential.
- **Bundling wellbeing activities with nature-based products** has great potential for creating

rich experiences that, for example, combine high-adrenaline adventures with relaxing activities.

- **Post-pandemic search for relaxation and wellbeing** is expected to boost the search for off-the-beaten-path destinations with low tourist density and 'social distancing'.
- **Slow adventure.** Opportunities are expected to increase as part of a desire for more ethical and responsible travel, with wonderful landscapes, tranquil nature and opportunities for 'reconnection and resetting'.
- **Creating a 365 day tourism season.** The nature of wellbeing tourism means that it should complement moves to lengthen the tourist season and increase tourist activity in the shoulders seasons.
- **Using events to drive visits to new areas.** Although a few wellbeing events do exist, such as ScapaFest, there is scope for more, recognizing their potential for bringing new consumers to less-visited areas.
- **The role 'routes' play in dispersing visitors.** Although not without attendant issues, the popular NC 500 (<https://www.northcoast500.com/>) has proved the attraction of routes. Other areas have followed suit, and have had some success in taking tourists to less visited areas.
- **Image/hashtag friendly.** The diverse range of activities encompassed by wellbeing tourism have great aesthetics and therefore provide great ammunition for social medias, business-to-consumer videography and 'trustworthy' consumer feedback as business marketing.

4. What are the Priority Actions?

Action	Priority Level (high / medium / low)	Whose responsibility
1. Promote connections between individual businesses	High	DMOs
2. Support the development of a range of well-being products and experiences	Medium	HIE
3. Revise existing products to include well-being	Medium	Businesses
4. Increase marketing activity to domestic consumers post-COVID	High	VisitScotland DMOs
5. Create wellbeing tourism training programs to development of new skills and professionalise the industry	Medium	Tertiary institutions
6. Increase funding resources to support well-being tourism development	Medium	HIE Scottish government

7. Improve marketing activity to overseas markets	Medium	VisitScotland
8. Organise familiarisation (fam) trips for influencers, bloggers and vloggers showcase local wellbeing tourism businesses	Low	VisitScotland DMOs

Resources

<https://www.theguardian.com/lifeandstyle/2017/dec/14/cosagach-is-the-scottish-hygge-more-about-wet-moss-than-warm-blankets>

<http://raglanchamber.co.nz/wp-content/uploads/2018/09/DAPRaglan-Oct2016-DraftV3-Finalised.docx.pdf>

VisitScotland (2017) Insight Department: Trends 2018.

VisitScotland (2019) Insight Department: Exploring the Role of Wellness in the Visitor Experience.

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