

The evidence for coastal wellness tourism

Destination Feelgood,
Max Clapham,
BDRC Continental

Developing coastal wellness tourism

Some reasons why

- **Community benefits**
- **A sizable sector**
- **A premium opportunity**
- **Uplift to other holidays**
- **An off-season market**

Some opportunities how

- **A partnership approach**
- **The coastal advantage**
- **Connect brand to trip drivers**
- **'Self-development' the visitor experience**

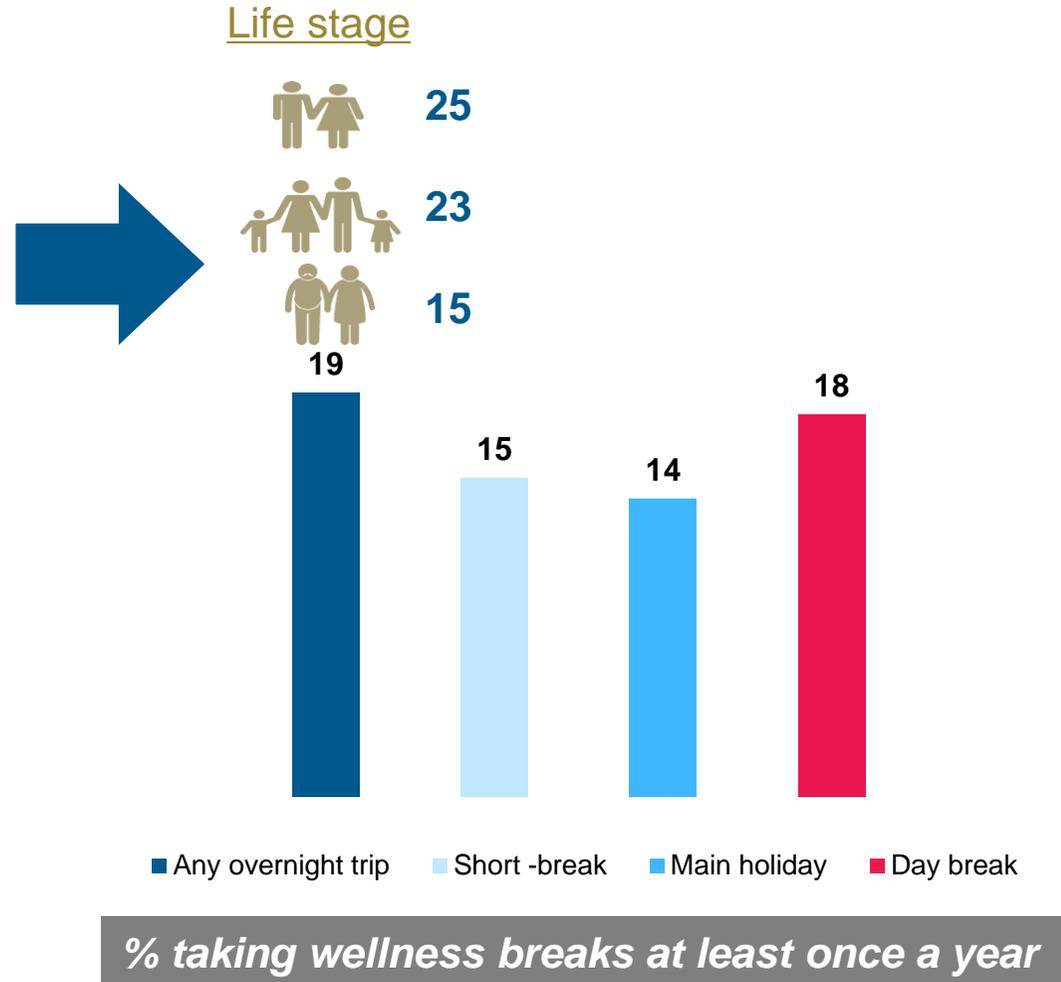


Why

It's a sizable sector...

1 in 5 of us take at least one dedicated wellness break a year where the primary purpose is to take part in activities and/or use facilities that enhance health and well-being.

- **34% ever taken a wellness break**
- **66% never taken a wellness break**



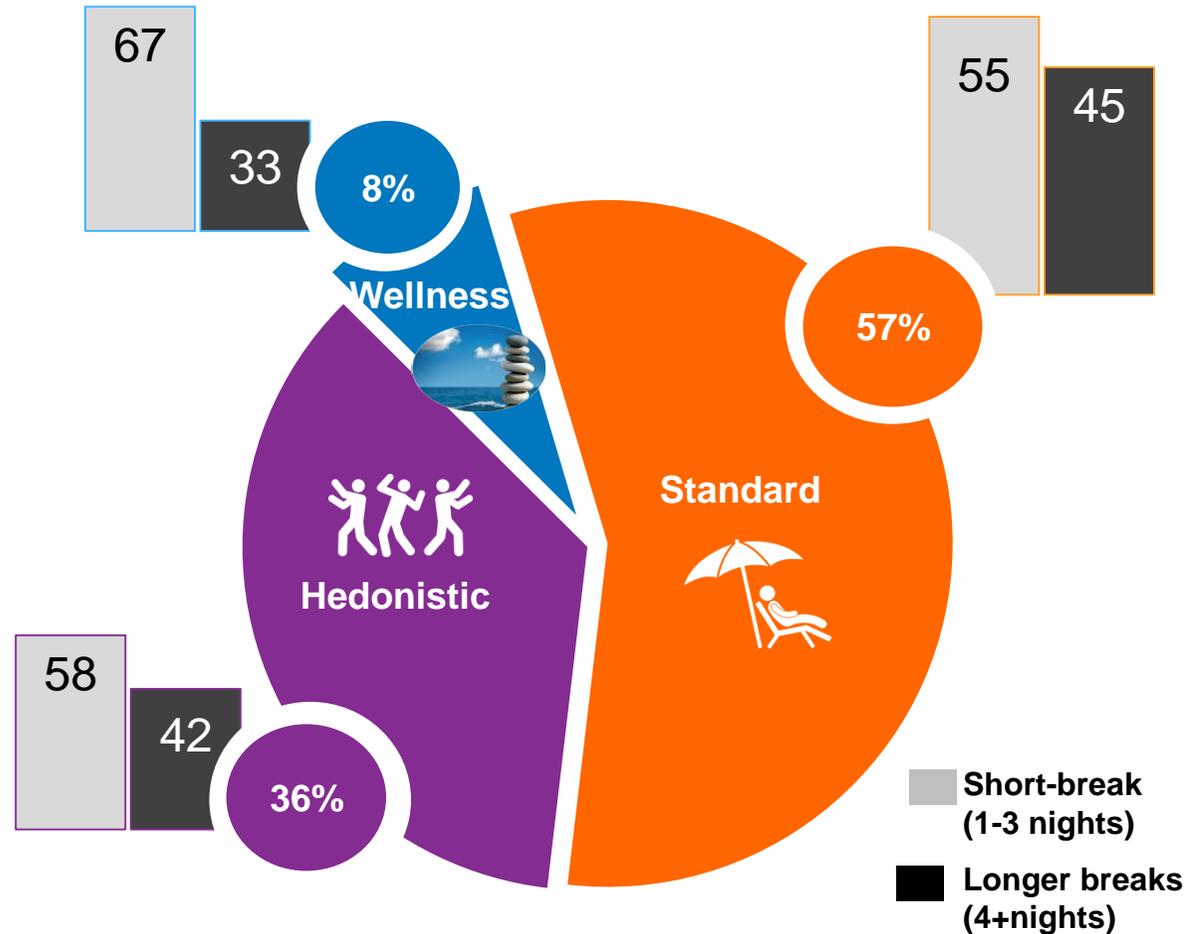
Why

....already a significant niche for coastal destinations

Nearly 1 in 10 overnight trips to coastal destinations are wellness focused breaks.

They are more skewed toward short-breaks than other holiday types.

Projected to grow worldwide nearly 50% faster than overall global tourism. (SRI international)



Holiday purpose of most recent coastal trip

Why

A premium opportunity attracting a higher spend with some acceptance of that premium

Wellness tourism injects a significant like for like £premium into coastal economies compared to other holiday types.

MEAN SPEND PER VISITING PARTY IN DESTINATION (exc. travel)

ALL: £534
Short Break: £366
Long Break: £726

Mean holiday spend **£617**

Mean holiday spend **£542**

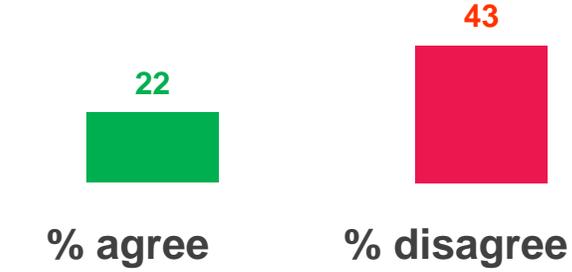
Mean holiday spend **£518**

I would pay for more for a wellness holiday than other types of holiday of similar duration

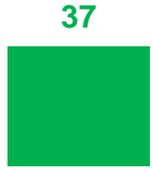
More acceptance of premium from family life stage.

Accommodation expected to stay in on a wellness holiday compared to other holiday types

Really no trading down for wellness.



Holiday trends report



% more premium

% more budget

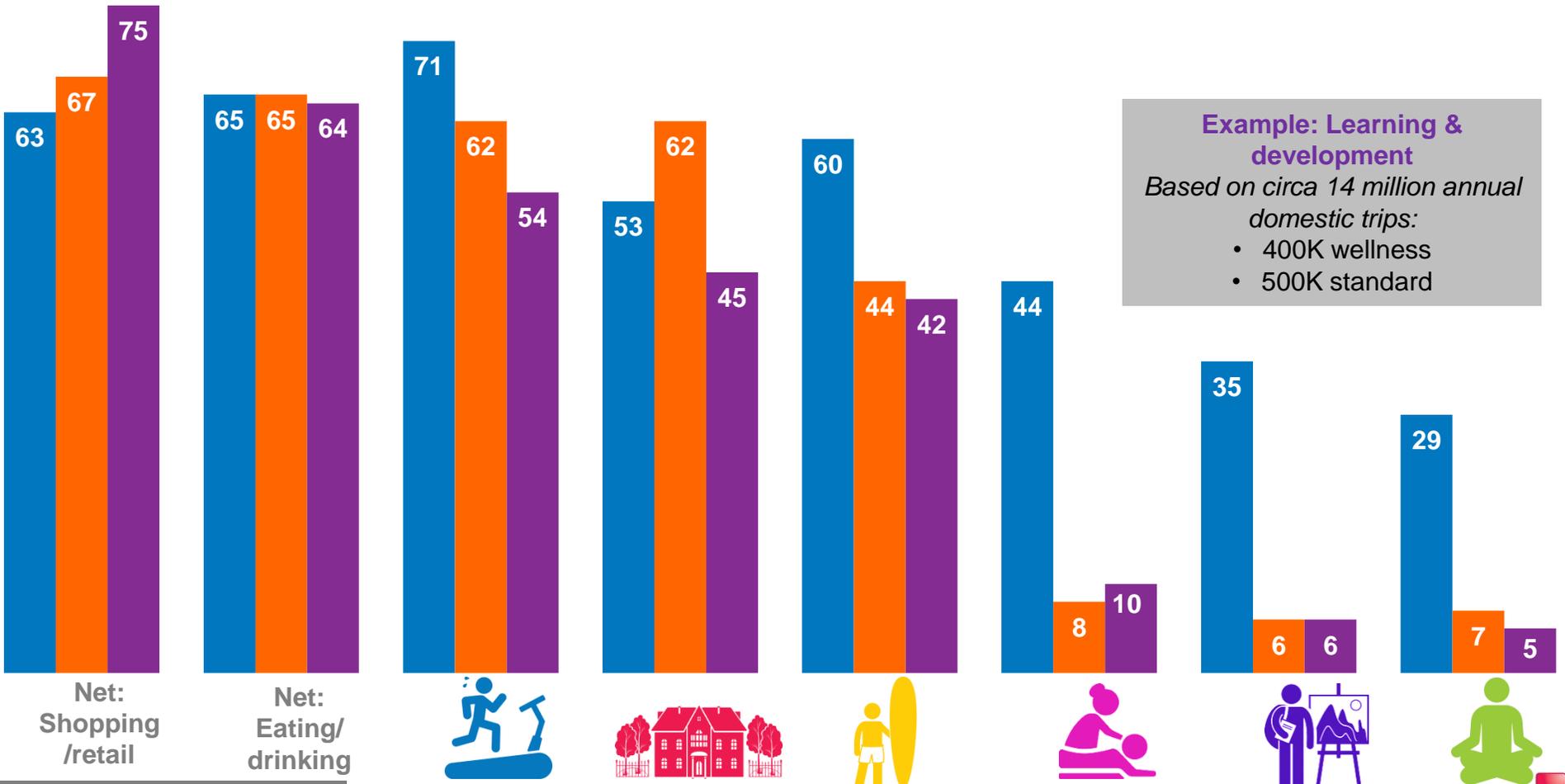


Holiday trends report



Developing a wellness proposition enhances a destinations proposition for all visitors

Wellness tourists do more on holiday but wellness activities are not the preserve of wellness tourists.



Example: Learning & development
 Based on circa 14 million annual domestic trips:

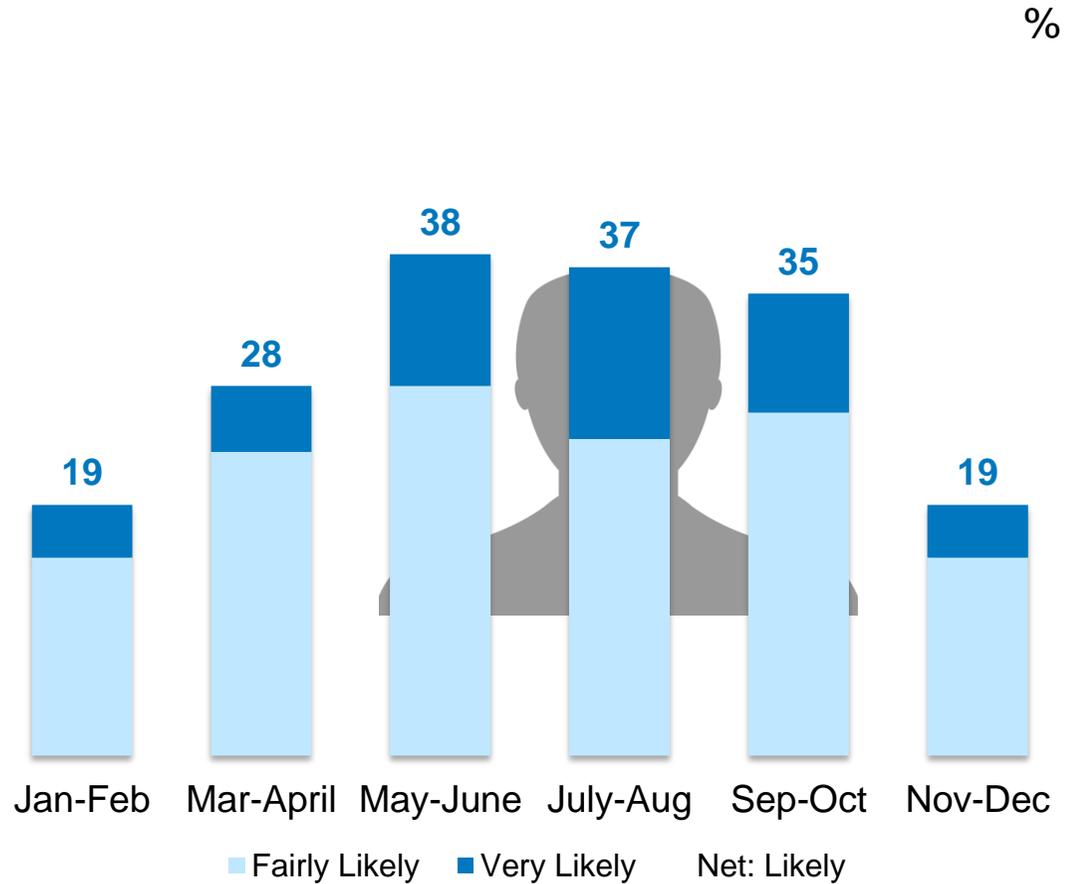
- 400K wellness
- 500K standard

Net: Activities done on holiday

Why

An off-peak season market

Strong shoulder season opportunities with a third of holiday makers consider a wellness break in Spring & Autumn.



Likelihood to go on a wellness holiday in ..

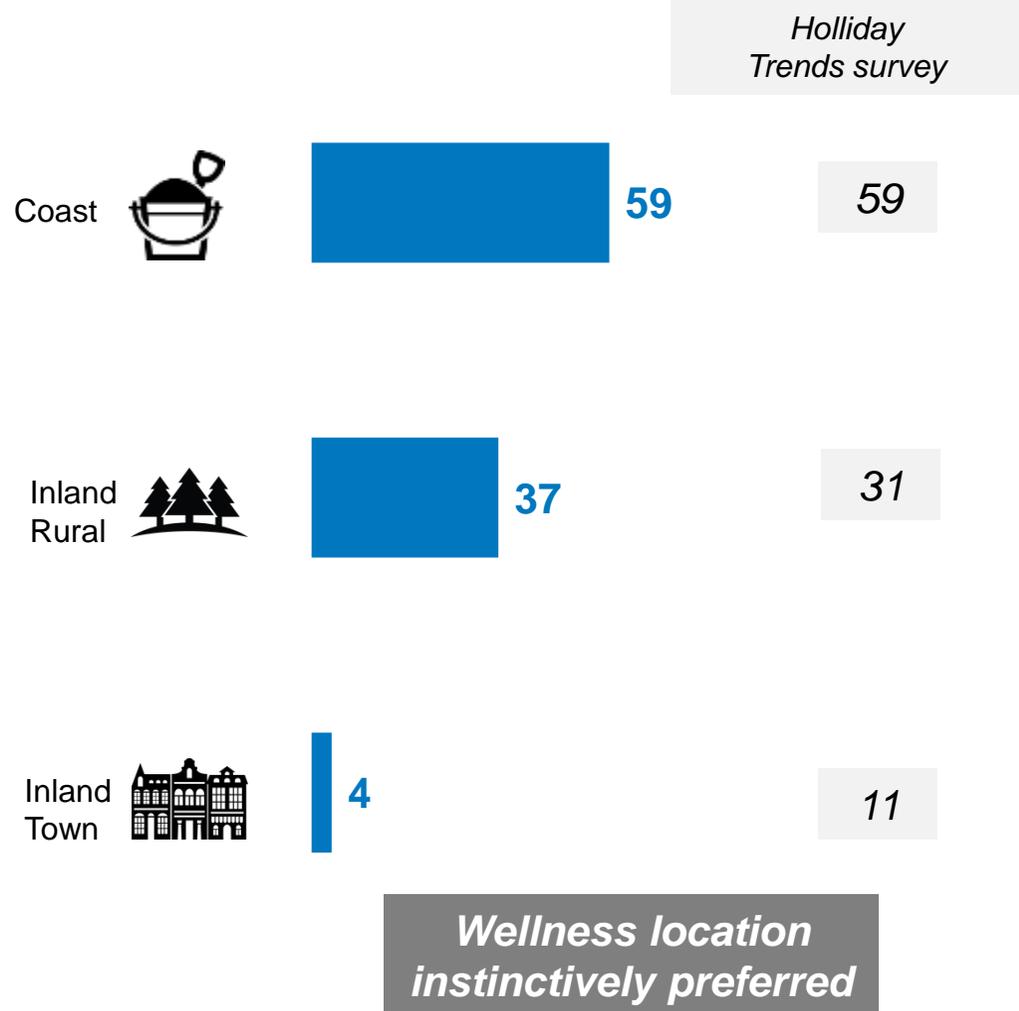
How Play to the coastal advantage for wellness

Majority instinctively equate wellness tourism to a coastal location.

Being by the sea makes you feel like you're totally somewhere else (Pre-family)

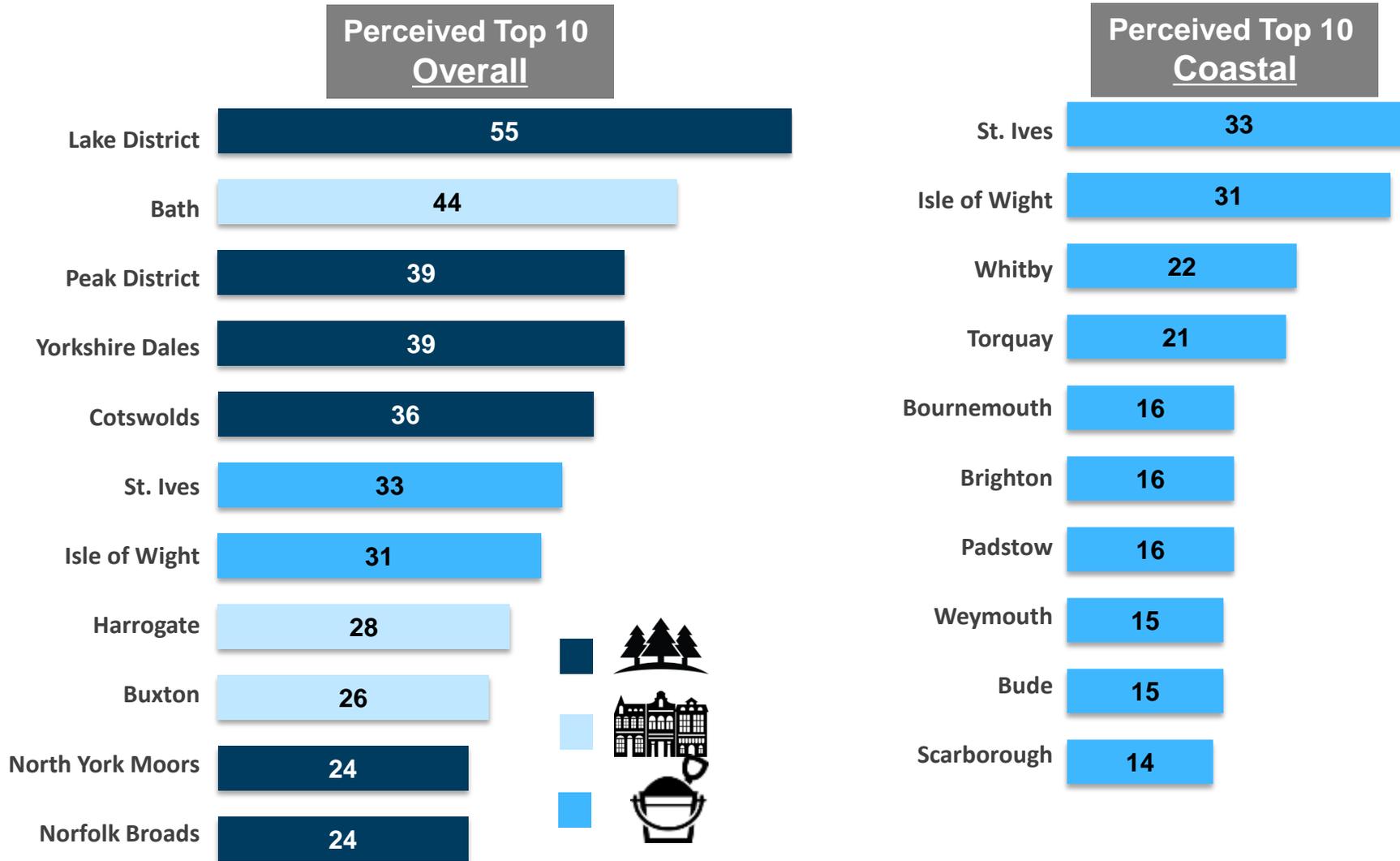
When I need peace I always picture the sea, just the sea moving around, it's so beautiful. Peace... the sound of the sea (Family)

You've got the dramatic scenery, the noise of waves crashing and cliffs, that's exciting (Empty nester)



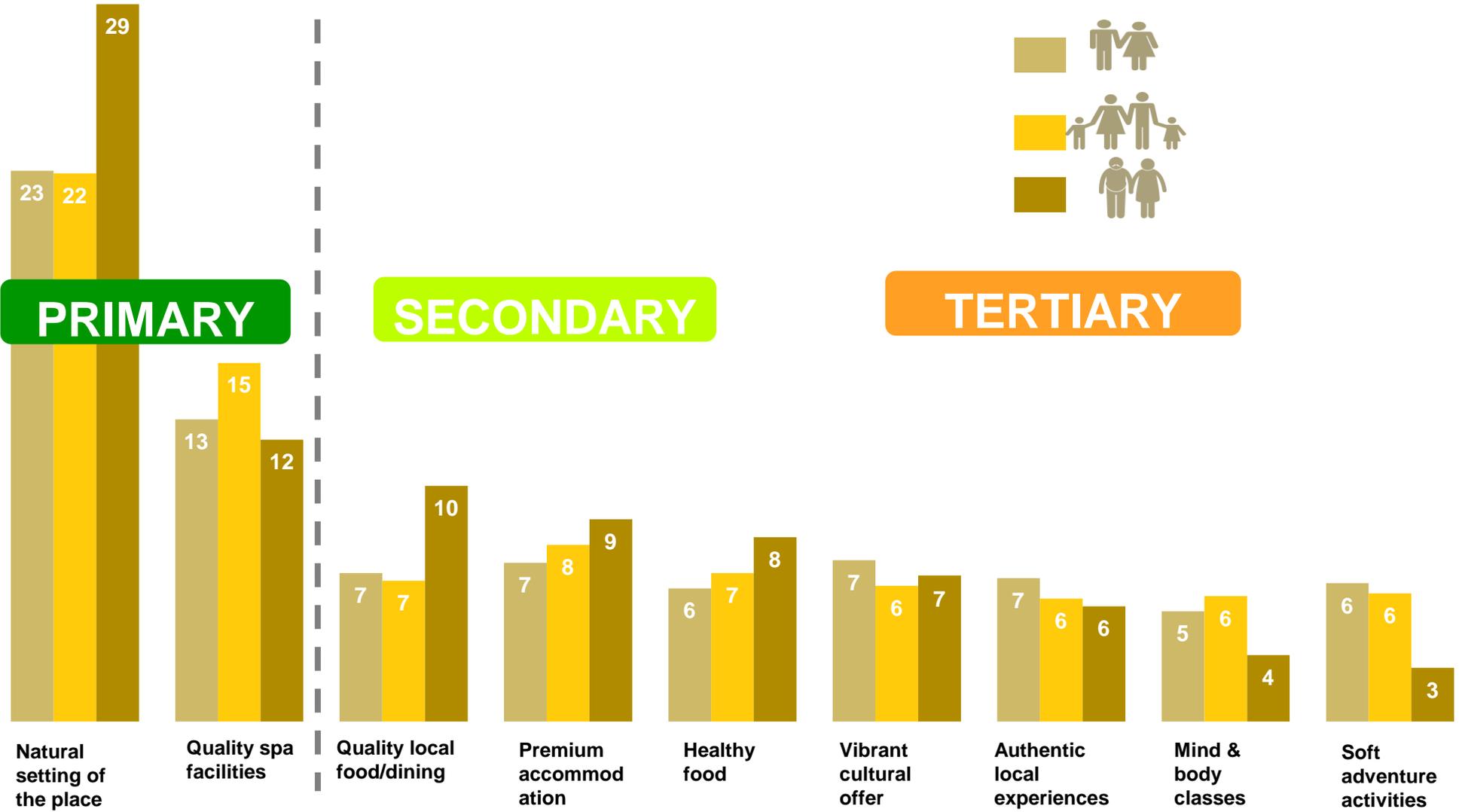
How

Better connect coastal brands to wellness



% saying YES, a good wellness destination

By focusing marketing to the attributes wellness tourists consider most important when choosing their destination

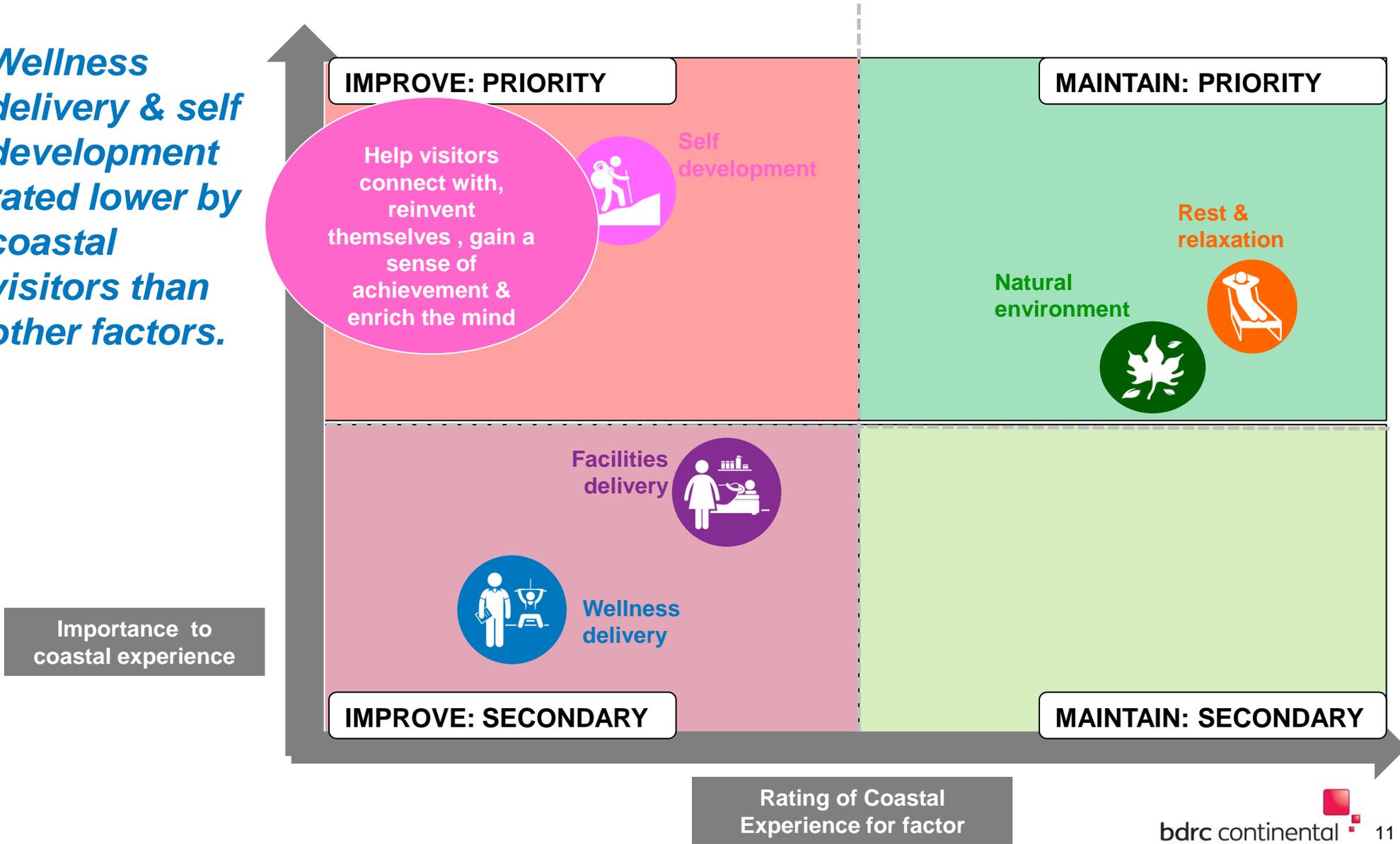


Attribute importance on wellness break consideration

How

Giving visitors the opportunity for 'Self-development' is critical to achieving long term success as a wellness destination

Wellness delivery & self development rated lower by coastal visitors than other factors.

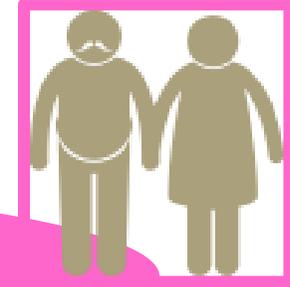


Importance to coastal experience

Rating of Coastal Experience for factor

How

Consider how well your destination enables self-development for each target audience you seek to attract



Top activities connected with self-development

1st

- Aerial-based based adventure activities

2nd

- Nature activities

3rd

- Swimming

1st

- Aerial-based adventure activities
- Eat at fine dining restaurants

2nd

- Cycling
- Nature activities

1st

- Nature activities

2nd

- Visit markets for local souvenirs/ goods

3rd

- Seek places for solitude and contemplation
- Yoga/ mediation, tai chi
- Botanical gardens

