

New Tourism Markets: Health and Well Being Holidays

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Introduction

Recent research conducted by STB/visitscotland has indicated a growing interest in holidays where relaxation and health are the focus as well as a rising interest in 'well being' holidays. This is a reflection of a growing trend of involvement in fitness activities and increasing interest in more 'alternative' lifestyles and therapies. However, what this interest in health and well being will mean for holiday taking behaviour is less clear, and open to debate.

In the summer of 2000, research was commissioned by the STB/visitscotland to provide a consumer perspective on this issue, with the following objectives:

- to provide a detailed understanding of what 'health and well being' means for consumers, in both general and tourism terms;
- to explore reactions to the concept of a health and well being holiday and specific health type breaks; and
- to explore perceptions of Scotland in relation to health and well being tourism.

The study used both secondary and primary research with consumers, namely; 12 extended focus group discussions in the UK, six paired interviews with couples in the UK and two extended focus group discussions in Germany. The consumer research covered Scotland's core target market: ABC1, aged between 25 and 35 years or 45 to 65 years old, most working, males and females, singles and couples, interested in relaxation or de-stressing, and including both past visitors to Scotland and those who have never visited Scotland.

Seven individual depth interviews were also carried out with opinion formers in the UK including experts in travel, spa tourism, journalism, general practice

and complimentary medicine. The discussions covered lifestyles, strategies for dealing with stress, perceptions of health and well being, health and well being breaks, and future potential markets for Scotland.

Lifestyles

Respondents described their lives as increasingly hectic and stressful due to the faster pace of modern life, with people generally working longer and harder hours along with decreasing job security. Increased expectations of what respondents wished to get out of life and the impacts of new technology also added to the levels of stress. People are now far better informed about a whole range of issues than previously, due to the increased availability of media and access to the internet. This heightened individuals' expectations of their lives with the goal of success at home and at work or 'having everything' or 'doing more in less time'.

Stress was found to be more common, partly from the fact that it has become more socially acceptable to talk (and complain) about. Main sources of stress mentioned were; work, lack of time, money, relationships, parental responsibility, health and day-to-day life. Experiencing stress led to irritability, impatience, fatigue, getting things out of perspective, pressure on relationships, a general feeling of unhappiness and dissatisfaction with life.

However, although stress was seen as a fact of life these days, and a certain amount of stress was seen as both positive and necessary, much effort was devoted to trying to minimise stress as much as possible. Results showed that many respondents felt that being recognised and rewarded for dealing with stressful situations was important.

Strategies for Dealing With Stress

Strategies for dealing with stress included achieving a balance between work and social life through active and passive relaxation. 'Actively relaxing' might include exercise, going shopping, going to the cinema or a sporting event, pursuing a hobby, going for a walk or a drive, socialising with friends. 'Passively relaxing' might include watching TV with a glass of wine, a beer, a box of chocolates or some other indulgence, having a long lie in, listening to music, reading the papers, taking a bath, sitting in a café or pampering oneself. A mixture of both active and passive relaxation was identified as being important in relieving the effects of stress (variety being an important factor) and holidays were crucial in keeping stress in check.

Perceptions of Health and Well Being

Health was associated with the physical rather than the mental, whilst well being was associated far more with a state of mind. The research showed that interest in 'health' had increased over recent years, but that it had various negative associations, for example, the active pursuit of health was not seen as a fun activity.

Well being was the opposite of feeling stressed, in effect 'happiness', and had some spiritual currency. Words such as contentment, confidence, calmness and inner peace were associated with well being. However, well-being was not something that individuals were consciously aware of striving to achieve, and pure well being was for most people a 'holy grail' - something that was never likely to be achieved. Activities identified as ways to achieve well-being consisted mainly of doing things you liked to do, with few, if any, obligations and restrictions, whilst ensuring a good mixture of active and passive pastimes.

Health and Well Being Holidays

Holidays were mentioned spontaneously during the discussions on stress and relaxation, as essential for dealing with the pace of modern life. The study showed that consumers don't have specific goals for their breaks or high expectations that such breaks

will solve particular problems, but they will gain some general, but undefined benefit from taking a break from their normal routine. Holidays/breaks add variety to one's life, contributing towards achieving a balance between work and spare time, and helping to recharge your batteries. Short breaks were thought to be even more beneficial than longer holidays in terms of relieving day-to-day stress. Increased benefits also came from the anticipation of a break away, which seemed to be almost as important as the break itself in dealing with stress.

The market for health and well being breaks was highlighted as not being particularly well defined in the UK at the moment, with 'well being' often tagged on to 'health' or 'fitness' rather than being seen as a separate entity. From the current tourism market, four main types of holiday emerged:

- those centred around spas which offered various beauty treatments and, in Europe specifically, curative or preventative health treatments;
- those which focused on diet and fitness regimes or perhaps programmes for detoxing or giving up smoking;
- those which featured sporting and fitness activities, generally with a focus on the great outdoors; and
- those which concerned spirituality, perhaps taking place in some sort of retreat or location associated with spirituality.

Specific 'health and well being' breaks were not something that UK consumers appeared to be currently familiar with; 'health' holidays were seen as old-fashioned, with potential associations with sanatoriums and strict health farms, while consumers' impressions of what might constitute a 'well being' break were ill defined, with interpretations of such breaks about individuals doing what they wanted to do, when they wanted to do it. In Germany, the concept of a health break was more tightly defined; entailed staying at a spa resort, was a necessity rather than a holiday, and would often be partly paid by health insurance.

Scotland's Product Development Fit

There were elements of the Scottish product that seemed to fit especially well with the core elements of 'well being':

- serenity, tranquillity, relaxed pace, the ability to create a sense of contentment, ease, peace;
- activities and natural features that can provide an escape from life's routines, the potential to feel distanced from home and the rest of the country;
- variety of places and activities - something for almost everyone, friendly, welcoming people; and
- a sense of wholesomeness.

One feature lacking in this context appeared to be that of indulgence (pampering, partying, letting your hair down, the 'craic') and those who are most likely to consider Scotland as a short break destination with well-being in mind are those for whom well being is about physical activities, health and spirituality, and who are prepared actively to seek such activities.

Future Potential

Holidays are viewed not simply a time for leisure, but also as a reward for effort, a solution, even an antidote to the rest of life, but few people see health as fitting easily with holidays of any kind. In most people's perceptions taking care of health is about being sensible and following rules - not enjoying yourself. Many people, perhaps especially the more affluent holiday takers, do not want to be 'sold' health and well being, they want to feel that they acquire them in ways that they choose. 'Well being' is a recognised term but is not something that people feel can be bought, nor something that can be acquired in a short time period. So how can marketing bring the idea of well being into holidaying?

The mainstream 'way in' may be to focus on the stress aspects, especially aiming at the younger sector of the market for short breaks, and using the idea of 'stress relief' holidays, which tie in with the concept of rewards and solutions. This may be the answer - if the idea of controlling one's stress is perhaps more accessible, and therefore more easy for people to achieve than pursuing the holy grail of well

being and happiness. It would involve looking again at the way short breaks are presented in Scotland and re-branding them as:

- something that people deserve for all their efforts;
- something so good that it will deal with the trials of everyday life;
- a place so absorbing that it will take you out of yourself; and
- a place to discover another dimension to your life/something that adds to your life.

Further information about the results from this study can be obtained from the STB/visitscotland web site 'www.scotexchange.net' in the 'Know your market section' from the report titled 'Health & Wellbeing Research'

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