

# What is the European market potential for wellness tourism?

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Since the pandemic, Europeans have become increasingly interested in wellness trips, as many would like to recharge and focus on their mental health. The European wellness tourism market is very diverse and offers many opportunities. It is therefore important to get to know your European visitors well, in order to meet their needs. Trends that are creating promising opportunities include the holistic understanding of wellness, an increased focus on fitness and nutrition, and the influence of social media on booking wellness holidays.

## Contents of this page

- [1. Product description](#)
- [2. What makes Europe an interesting market to target for wellness tourism?](#)
- [3. Which European countries offer the most opportunities for wellness tourism?](#)
- [4. Which trends offer opportunities in the European wellness tourism market?](#)

## 1. Product description

### Definition

The category of Wellness Activities and Fitness includes the range of activities undertaken in the pursuit of wellness whilst on a leisure trip. Wellness tourism has many specialist niches. Each of these niches is unique, and tourists can have very diverse wishes. It is important to be informed about the specialist niches so that you can target European tourists effectively.

The table below lists the different niches, what they mean and examples.

Wellness tourism has eight dimensions: social, physical, spiritual, emotional, preventative, intellectual, societal and financial wellness. This study focuses on physical, emotional, preventative, and spiritual wellness. Many wellness dimensions overlap. Specialist niches can belong to one or more dimensions. For example, destination spas and hotels, hammams, hot springs, and wellness retreats fall into the dimensions of physical, emotional and preventative wellness. Yoga or Pilates, ashrams, martial arts and meditation contribute to physical, emotional and spiritual wellness.

Table 1: Specialist niche markets, descriptions and examples

Specialist Niches	Meaning	Example
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<p>Destination Spas or Hotels</p>	<p>Destination spas or hotels are for people that are looking for a few days of ultimate relaxation. A combination of baths, massages, saunas, and beauty treatments is often included.</p>	<p><b>Ciêla</b> in Zambia is a resort and spa where people can enjoy massages, steam rooms, hydrotherapy and other wellness services. It works with local Zambian wellness products that are sustainably sourced. Children can enjoy indoor and outdoor play areas under professional supervision. Besides the spa, the resort also offers a golfing facilities, safaris, and hiking trails.</p>
<p>Wellness Retreats</p>	<p>Wellness retreats often include a wellness programme with accommodation at a resort or hotel. The providers often have their own philosophies that underlie their offer. Wellness retreats can include fitness while spas will not include fitness.</p>	<p><b>Fivelements</b> in Bali, Indonesia, offers Balinese therapies that have been applied for centuries. The holistic element of their offers is key. Customers can expect a health reset for both mind and body. Indonesian cuisine, fitness and healing all come together in this wellness retreat. <b>LifeStart Retreats</b> offers a health programme in Zambia for people that want to improve their diet and fitness level. Tourists can expect a personal health assessment, fitness classes and healthy meals on the terrace.</p>

<p>Yoga and Pilates</p>	<p>Yoga and Pilates are exercises that aim to improve both physical and spiritual wellbeing. Yoga and Pilates focus on flexibility, strength and alignment. The exercises are practiced with a focused and relaxed mindset.</p>	<p><a href="#">Made in South Africa</a> is a South African tour operator that organises yoga safaris in South Africa and neighbouring countries like Botswana and Zimbabwe. Tourists enjoy the beauty and adventure of the wilderness and the relaxation of yoga in a luxurious eco-retreat. <a href="#">Inle Sanctuary</a> offers a range of yoga practices in Myanmar. This is a place where yoga, meditation and breathing techniques come together. The package it offers includes workshops to benefit the women in the local community.</p>
<p>Thai Boxing, Karate or Tai Chi</p>	<p>Thai Boxing, Karate and Tai Chi are martial arts. They are combat training sports. Mindfulness is an important component of the martial arts.</p>	<p>Thailand's <a href="#">Battle Conquer</a> offers training packages for martial arts such as Thai boxing. Next to the boxing training, it offer tours to various temples, massage treatments and high intensity fitness trainings.</p>
<p>Spa</p>	<p>One-day spas are often located in or near the city. People will visit the spa for half or a whole day. Visitors can often decide if they make use of a package of services or roam the spa on their own. Spas often include baths, massages and saunas.</p>	<p><a href="#">Mangwanani</a> is located in the South African city of Johannesburg and offers day packages for visitors. It also offers individual treatments, such as massages, manicures and pedicures. Couples can book a romantic spa package. In addition, it also offers night-time spa packages, full-day and half-day packages.</p>

<p>Hammams or sauna</p>	<p>Hammams and saunas are hot-air or steam baths that detoxify and cleanse the body. There are many different kinds, varying in temperature, steam density and complementary features like aromas.</p>	<p><a href="#">Spa Laaroussa</a> is located in Morocco where tourists can enjoy the hammam. The traditional steam bath can be followed by a massage by a professional therapist with essential oils.</p>
<p>Meditation</p>	<p>Meditation is an practice that centres around observation, awareness and focus. At a meditation retreat, people will sit still and observe the mind for long periods of time. Meditation retreats sometimes include yoga or other mindful activities.</p>	<p><a href="#">Sen Wellness</a> in Sri Lanka is a meditation retreat that focuses on mindfulness meditation. It offers stays ranging from 1 to 14 days. It also offers meditation programmes where visitors train the mind under professional guidance. In addition, tourists can practice yoga at sunrise and sunset if they want to.</p> <p><a href="#">Vipassana Meditation</a> offers multi-day meditation courses in Uganda to get familiar and improve visitors' meditation practice to experience the benefits of observing and understanding the mind.</p>

<p>Hot springs or thermal baths</p>	<p>Hot springs and thermal baths are sources of hot water in nature with healing minerals that are good for the body. Many of these hot springs have facilities built around them to accommodate visitors.</p>	<p>Jordan's <a href="#">Ma'in Hot Springs</a> offers access to natural pools and hot springs. Tourists can decide if they want to visit for a day or stay overnight in one of the luxurious rooms. It provides a lot of information on the healing properties of the water. Family friendly activities are available for people who want to bring their children. <a href="#">Timeless Ethiopia</a> offers day trips to the healing hot springs. If tourists want to enjoy the hot springs for longer, they can extend their day trip to a multiday trip.</p>
<p>Ashrams</p>	<p>Ashrams are places where people go for spiritual or religious retreats. They are often remote monasteries where people pray or meditate. Sometimes people travel there on pilgrimages.</p>	<p>India's <a href="#">AyurYoga Eco Ashram</a> offers various courses on yoga, reiki and Ayurveda. It allows tourists to develop spiritually while practicing meditation, yoga and art.</p>
<p>Treatments</p>	<p>Treatment tourism is where tourists travel to receive medical care for their condition or detoxify from certain substances. These tourists may look for alternative treatments or treatments that are only available in certain regions.</p>	<p>The Jordan <a href="#">Dead Sea Spa</a> offers a medical centre for people with conditions that require water or mud treatments for their condition. They receive a specialised examination and advice from an accredited doctor during their stay.</p>

Source: [Molgo](#)

Wellness tourists find it important to improve or maintain their wellness during a wellness holiday. Although this can look different for everyone, it often includes a combination of physical, mental and spiritual health practices. European wellness tourists often look for relaxation, spa facilities, fitness, [religious](#) and spiritual retreats to improve or preserve their well-being. Many tourists want to combine several wellness activities to feel optimally rejuvenated and to reconnect with themselves, improve their health and get away from their busy day-to-day life.

Wellness tourists often enjoy adventure travel activities on the side, such as [diving](#) and [wildlife watching](#). Wellness and adventure travel is often included in one package. Other popular combinations include food and wellness holidays, as well as sports and wellness holidays. Wellness activities and wellness holidays are becoming increasingly popular with Europeans, thus [creating opportunities on the European outbound tourism market](#).

This report addresses reasons that make Europe an interesting market for wellness tourism, the European countries with the most potential, and trends that offer opportunities.

### Tips:

Read our studies on markets that overlap with wellness tourism, like [the European market potential for sport tourism](#), [religious tourism](#) and [luxury tourism](#). This can improve your understanding of what Europeans consider important during a wellness holiday.

Read our studies on [wildlife tourism](#), [adventure tourism](#), [food tourism](#) and [dive tourism](#) to gain an understanding of what European tourists like to do in addition to their wellness activities. Offering a combination of wellness and other activities can make you stand out.

Find out which specialist niches you want to target. Each specialist niche has its own unique demands and expectations. You need to know a lot about the tourists you want to attract and the services you will offer. Europeans consider it important to know that they will be well taken care of, and your expertise is likely to gain their trust.

Connect with experts in the field, like wellness experts and health experts. Wellness tourists have specific needs and wishes, depending on the specialist niche, European source country and beliefs about wellness. Advice from experts will help you develop optimal offerings.

## 2. What makes Europe an interesting market to target for wellness tourism?

Together with North America, Europe has the largest wellness tourism market, with [almost 300 million wellness trips](#) before COVID-19. Europeans are increasingly interested in wellness trips. The wellness tourism industry is [likely to grow by 20.9% each year until 2025](#). Experts agree that spending on wellness treatments and facilities is going to increase. The number of wellness trips is also expected to increase. This means that many people will be first-time wellness travellers. There will also be an increasing number of non-wellness travellers spending a day or afternoon at the spa, getting a massage or following a day programme as part of their holiday.

European wellness travellers are demanding, but they spend [53% more than the average tourist](#). Many are willing to spend a few thousand euros for a week-long wellness holiday. In return, they often want to enjoy luxury and professional treatment. Those who go to spa destinations and yoga or fitness retreats are especially likely to spend a lot of money. Many ashram and meditation centres that focus on self-development instead of luxury are much less expensive.

### Europeans' wellness demands

Europeans care about personalized services, especially in terms of wellness. Individual Europeans have their own views on what wellness means to them. For example, 29% of all European travellers seek [personalized holiday packages with special services](#) that suit their needs. Packaged holidays became especially popular during the uncertain times of the COVID-19 measures. The most important considerations when seeking to attract European tourists are 1) location and setting; 2) brand and reputation; 3) storytelling; 4) and treatments

and services.

Different people have different wellness needs, and tourists want to be able to enjoy a combination of services that meet those needs. Some tourists consider fitness very important, whilst others prefer a day at the spa for their health and relaxation. Other tourists do yoga or meditate to ensure their well-being and reconnect with themselves.

The variety of interests in wellness tourism creates many opportunities, but you have to know your customers well to meet their demands. Europeans love unique experiences. It is important to find out which practices make your destination unique and incorporate them into your wellness offerings. These practices are important tools to diversify your product range and attract European tourists. For example, the tour operator for the South African wellness and safari [Siyabona Africa](#) offers body treatments using red ochre as a restorative component. The ingredient is also used by indigenous people in Namibia.

Figure 1: Red ochre is a natural resource highly associated with the African landscape



Source: Shutterstock

It is important to sell your services, treatments, classes or products well. Europeans consider it important to receive the services that they expect whilst booking their holidays. Attracting Europeans through storytelling is important, especially for wellness services. The atmosphere that tourists wish to experience plays a major role in wellness holidays. Your story should create an atmosphere associated with your products.

It is important to provide a lot of information about your services, the knowledge underlying them, and why you are a suitable provider. Credentials, knowledge, experience and information can increase trust amongst Europeans and make them more likely to choose your offerings.

Most wellness travellers want all-inclusive holidays, with all treatments, accommodation, food and drinks included in the price. The most popular wellness activities right now are yoga and Pilates, with [67% of wellness tourists being interested in this activity](#). In second place are spa treatments (42%), followed by meditation classes (39%).

Different world regions often [attract different wellness tourists](#). For example, people interested in combining eco spas and adventure holidays with wellness activities are likely to travel to destinations in Africa and South America. Many Europeans travel to Southeast Asia looking for thermal baths, hot springs, yoga and meditation retreats.

## Europeans' motivation to go on a wellness trip

According to a study by the [Wellness Tourism Association and Health Tourism World Wide](#), the most important motivations for going on a wellness holiday are de-stressing or recharging, relaxation, self-healing, self-development, fitness, escapism, self-reward, rejuvenation and pampering.

When the holiday is over, tourists want to feel rejuvenated, relaxed and relieved. It is important to create an atmosphere that reflects these characteristics. For example, including plants, earthy colour tones and soft or natural lighting can be very important elements in your facilities. These natural aspects are important, as many wellness tourists are seeking to escape city life and their busy jobs. Nature and privacy are the perfect way to do this.

Figure 2: Many wellness packages include massage in a peaceful environment



Source: photo by [Karolina Grabowska](#) via [Pexels](#)

Mental health is often the primary motivation that tourists have for going on a wellness holiday, followed by physical health and spiritual health. Many tourists seek to target several aspects of health at the same time. They aim for holistic holidays targeting their mental, physical and, in some cases, spiritual health. Yoga and meditation are becoming increasingly interesting for tourists. This is the case across all age groups. It could be attractive to European tourists to provide the option of attending yoga and meditation classes as a part of an all-inclusive package.

Fitness and spa wellness holidays also continue to be high in demand. Weight-loss and detox holidays also continue to be popular, although the perspective is shifting. Many Europeans are focusing on becoming healthier instead of on losing weight.

## **COVID-19 travel restrictions and measures**

As a result of the pandemic, many Europeans have become more conscious of their health and wellness. People have spent more time outdoors, connecting with nature and themselves. Many have started to enjoy a more simplistic lifestyle and want to focus on healthy eating, a healthy mind and body, and healthy relationships with themselves and others.

In the short term, many Europeans will stay close to home for their wellness travels. Travel restrictions and measures are still very uncertain, and travelling within Europe is likely to be easier and safer. Travellers are likely to resume their trips to long-haul destinations in the coming years. Since the pandemic, most tourists have been booking their trips more spontaneously and less in advance. This is a way to avoid the uncertainty of booking months in advance. Tourists try to minimize the chance of sudden cancellation due to COVID-19 measures.

COVID-19 has led many Europeans to want to stay away from crowds. Trips to secluded areas are becoming increasingly important. Tourists seek to immerse themselves in nature, seclusion and remote destinations. Europeans have experienced a lot of pressure under strict pandemic measures. Many have experienced depression and anxiety during the pandemic. The demand for wellness holidays has increased, as many Europeans are seeking to recharge and feel mentally well again.

Hygiene and social distancing are very important, especially during and after the pandemic. Elderly people are especially at risk of getting COVID-19. It is very important to inform your customers about the measures you are taking so that they will feel safe.

Finally, tourists are 20% more likely to book their holidays through a booking professional than before the pandemic. This makes it more important for you to advertise to tour operators in Europe to gain customers. The security of packaged travel has been the leading motivation for Europeans to book through tour operators during the uncertain times of the pandemic.

### **Tips:**

Learn about [managing the effects of COVID-19 in the tourism industry](#) to find reliable sources about the COVID-19 situation in Europe. Read about [how to respond to COVID-19](#) for a step-by-step guide that can help you respond and recover from the effects of the pandemic.

Get to know your customers and their specific wishes. Find out their beliefs about wellness and what their needs are. Make your offerings stand out by linking this information to the features that make your destination unique.



Find out what tourists like to do in addition to wellness activities. For example, read our studies on [ecotourism](#), [adventure tourism](#), [wildlife tourism](#), [luxury tourism](#) and [sports-related tourism](#) to learn more about other interests wellness tourists might have.

Learn about effective marketing through storytelling, and offering unique and personalized experiences to attract European tourists. Read our study on [how to be a successful tourism company online](#) to learn effective ways of building your online presence and attracting European tourists.

## Market Segmentation

The European market for wellness tourism is diverse. Most European travellers going on wellness holidays are between the ages of 25 and 45 years. Different age groups are drawn to different things. For example, elderly people, baby boomers and millennials are often interested in treatments involving natural resources (e.g. thermal water, hot springs and ocean-based treatments). Massages are also more popular with older travellers.

Younger adults tend to be more interested in active therapeutic recreation (e.g. fitness, yoga or nutrition programmes) to improve their health. They are also more likely to go to festivals centring on spirituality and wellness. They enjoy being physically active and consider this important to their well-being. One example that attracts younger wellness travellers is the [Bali Spirit Festival](#) in Indonesia. This event combines music with a range of wellness activities, including martial arts, meditation, yoga and breathwork.

European wellness tourists can be divided into three distinct groups: self-development travellers, escapers and treatment tourists.

### Self-development travellers

Europeans seeking personal development are likely to go on retreats involving meditation, yoga, martial arts or fitness. Ashrams also often attract travellers who are interested in understanding more about themselves. These tourists are most likely to want to increase their spiritual wellness, in addition to enhancing their physical and mental wellness.

These wellness tourists often travel solo or with a partner or close friend. Meditation, yoga and fitness retreats are often very individual or intimate experiences. This makes it more appealing to solo travellers or those travelling with close friends or partners.

Figure 3: Meditation in nature creates an inspirational setting for self-development



Source: photo by [Noelle Otto](#) via [Pexels](#)

Self-development travellers are highly interested in learning new things. Examples include playing different sports, cooking different dishes or practicing a new approach to mindfulness. Consider incorporating workshops or classes into your offerings to meet these self-development needs.

Working from home has become very popular since the pandemic. Many Europeans decide to work from holiday destinations instead of from their at-home desks. Europeans like to be [productive whilst reaping the benefits of a wellness holiday](#). Flexible holiday packages that are suitable with a working traveller's schedule are interesting to them. These tourists also tend to stay for longer periods, as compared to other wellness tourists.

## Escapers

Escapers want to take a break from their busy lives at home. Many of these tourists live in cities and have demanding jobs. Relaxing and recharging are especially important for them. Families, couples and friends tend to go on these trips together. These travellers often opt for more generic wellness holidays, like destination spas or wellness retreats. Solo travellers also [go on wellness trips to escape their day-to-day lives](#). They sometimes reward themselves with a wellness outing when they have achieved or overcome something major in their personal or professional lives.

Parents with children often travel during school holidays. This is usually during the summer or winter months. These travellers tend to go to destination spas, wellness resorts or one-day wellness activities. It is important for them to have programmes that are suited to the whole family. Activities in addition to wellness can be important. Examples could include safaris, surfing lessons or family cooking classes. Moreover, the availability of an animation team or a babysitter can ensure that parents can have a break from taking care of their children. Make sure that children are safe and entertained whilst their parents enjoy a massage, yoga class or dinner together.

It is important for families on a wellness holiday to connect with their children and be able to relax without constantly caring for them. Providing this balance is a key to success when targeting this group. One example is [Amatara Phuket](#)'s package for families. It includes family breakfasts, a wellness consultation for adults, a family yoga or Thai boxing class, and a kids' club.

Friends enjoying wellness holidays together are most likely to consist of women than of men. These tourists come either in groups or in pairs. It is important for friends to spend time together during their wellness holidays. Larger accommodations or private workshops can therefore be appealing.

Some couples use wellness trips to reconnect and have some time off without children. These trips are also called romantic holidays. Couples massages, a private sauna and a private, romantic dinner under the stars are examples of activities these travellers look for. Their priority is to connect with their partners and relax. Luxury, pampering and privacy can be important to these tourists.

Escapers can be divided into primary and secondary wellness tourists. Primary wellness tourists are motivated by wellness when planning their holidays. For example, these tourists might book a complete wellness package at a spa retreat, go on a package martial arts trip or take a medical trip to a treatment resort. Secondary wellness travellers want to include some wellness activities or a wellness day in their holiday plans. For example, these tourists might choose to go to an urban spa, attend a yoga class or attend a one-day or two-day program at an ashram.

Both groups are interesting to travel providers, and they can often be targeted simultaneously by offering different programs.

In many cases, European primary wellness tourists are already familiar with wellness services, such as spas, massages, yoga or martial arts. These activities can often serve as stepping stones to wellness holidays. Primary wellness travellers are often more knowledgeable about the treatments they would like to receive. Secondary wellness travellers are often more open to trying something new, and they are likely to have fewer demands.

Secondary wellness travellers are an interesting market to target. About 85% of all expenditures on wellness activities come from secondary wellness tourists. It is important to note that secondary wellness travellers can become loyal customers in the future, and they often recommend their activities to friends and family at home.

Figure 4: Martial arts focus on physical and mental growth



Source: photo by [Cottonbro](#) via [Pexels](#)

A primary wellness tourist might book a week-long Muay Thai programme to develop physically and mentally. [Lionheart Muay Thai](#) is a martial arts retreat in Thailand that focuses on fitness and martial arts. Tourists are often already familiar with practicing martial arts and doing fitness before booking a holiday.

## Treatment tourists

Medical wellness tourists go on wellness holidays to receive treatments for diseases or pain. For example, tourists with rheumatism might go to hot-spring resorts, whilst those with chronic pain might seek acupuncture treatments.

Knowledge and certification are especially important when targeting medical wellness travellers. It is best to approach tour operators that specifically target this group, as this will allow you to work together with other experts knowledgeable in the field. They are more aware of insurance coverage, the criteria to which you must adhere and the demands of European treatment tourists. Some of these travellers are able to get insurance for their trips abroad if required by their medical situations. The insurance companies are decisive in determining whether a patient's insurance will or will not cover these costs.

It is important to note that treatment tourists are likely to stay longer than one or two weeks. This enhances their ability to experience the benefits of the treatment. Some of these tourists might experience limitations due to disease or pain. Adjusting the environment so that it is [accessible to people with disabilities](#) is crucial. Increased hygiene standards, social distancing and other COVID-19 measures are especially important for this group, as some of these tourists cannot afford to become ill.

Treatment tourists might travel together with a partner, close friend or nurse who can assist them during their holidays. This is highly dependent on their illness and its severity.

### Tips:

Read the [Global Wellness Economy Monitor from the Global Wellness Institute](#) to learn more about wellness and its various characteristics and dimensions.

Cooperate with health professionals and the health sector. Employing and being associated with credentialed experts and health institutions is crucial for gaining the trust of European tourists.

Market your offerings to specific target groups. For example, travellers going to a spa may want to recharge, whilst self-development travellers want to learn and reconnect with themselves.

Include activities that are not related to wellness in your programmes as well, in order to make the holiday unique and appealing to your target group. Safaris, day trips to the beach, visits to a temple and workshops are examples of activities you can include to diversify your offerings.

## 3. Which European countries offer the most opportunities for wellness tourism?

Germany, the United Kingdom and France are the most important European source markets for wellness tourism, followed by the Netherlands, Spain and Italy. Austrians, Belgians, and Scandinavians are also interested in wellness holidays, but the markets in these countries are smaller than those in the top six countries.

The European nationalities that are interested in wellness tourism are quite diverse. It is important to understand the different interests and behaviours of these nationalities in order to be effective in

accommodating their needs.

## **Germany: Experienced wellness travellers**

Germans are regular and experienced travellers, and many go on wellness holidays. They are more likely than other Europeans are to go on medical wellness trips. German insurance companies are also more likely to cover medical wellness trips than are their counterparts in other European countries. This has made Germans more motivated to go on wellness holidays and has allowed wellness trips to become part of the German culture.

Package holidays are popular with German tourists. This was especially true during the COVID-19 pandemic. In 2021, summer holiday packages increased by [134% compared to previous years](#).

German holiday travellers prefer to have a lot of information about their holiday packages and the products and services that you sell. It is important to provide information on the importance of certain products and services. Scientific evidence on the effectiveness of the treatments and services they are receiving is interesting to German tourists, and it is necessary to attract them. They are likely to ask questions about why the treatment is effective and how it works. In addition, they consider it especially important for you have the proper credentials for providing the treatment, and they are more likely than other tourists are to ask about your certifications.

Germany itself is a popular destination for wellness travel. This reflects the prominence of wellness treatments and activities in the German culture. Popular activities include going to the spa or thermal baths, and having a massage.

Germans are also very conscious of sustainability, and they are quite demanding in this regard. They are more likely to book a package holiday if they are convinced that it is a sustainable choice.

Travellers from Germany who are interested in wellness are often motivated by a desire to be pampered or to recharge. Both women and men are interested in wellness, as are couples and families with children. German tourists are especially interested in spending time in nature. Natural settings and nature-based treatments can be especially important to them. They are also interested in going to spas and hot-spring facilities.

## **The United Kingdom: British tourists focus on mental wellness**

Two million British people were [planning to take wellness holidays in 2020](#), before the pandemic affected Europe. In 2020, [19% of all British travellers reported wellness holidays as their main holiday](#). Their main motivation for going on wellness trips was to improve their mental health. British people are willing to much more on wellness holidays than they are for other holidays. Many will spend up to 50% more than their usual budget on such trips.

Holistic packages, yoga and meditation retreats are interesting to British wellness tourists. They are also interested in fitness and weight loss programs. In addition, they like to go to spas, and many prefer to be able to go to the gym during their wellness holidays. Like Germans, British people place high value on nature, and they consider it important to experience the local nature whilst on holiday.

British travellers are increasingly interested in the immediate gratification of treatments (e.g. massages or yoga classes). Connecting with their feelings, improving their emotional and mental health, and breaking free from unhealthy patterns are motivations for many British people. Women, couples and families are the most likely to be interested in wellness treatments.

## **France: Higher spending on wellness than other Europeans**

French people spend money more freely than other Europeans do. Detox, Ayurveda, Thalassa therapies and mud baths are popular with French wellness tourists. Spas and wellness retreats are also popular. In addition, the French are increasingly interested in skincare and beauty treatments. Consider offering these tourists local, nature-based products that fit into their wellness holidays.

French people tend to go to French-speaking countries, like Madagascar and the Republic of Côte d'Ivoire. Many are not comfortable speaking English. If you would like to attract these tourists, be sure to provide information in French. Faraway destinations are popular with French travellers.

## **The Netherlands: Preventing being overworked and improving fitness**

Dutch people often go on wellness holidays to relax or to get on track with their fitness. Dutch people do not tend to go on medical trips as often as Germans do. Wellness trips are rarely covered by insurance companies in the Netherlands. Although Dutch tourists might be interested in some medical wellness practices during their trips, this is usually not their main purpose for travelling. They prefer to go on trips to prevent being overworked and to relax.

Dutch people are health-conscious, however, and they want to lead a healthy lifestyle both at home and on holiday, including healthy food and fitness options.

Dutch wellness travellers are especially likely to enjoy destination hotels, including spa facilities, beauty treatments and massage. Weight loss programmes are also popular with Dutch people. They consider it important to receive expert advice during their holidays. Those who are working on their fitness and dietary goals are likely to appreciate receiving an at-home programme to follow when they return. Dutch people have much less experience with wellness activities than Germans do. They are therefore likely to perceive going to hot springs and saunas, and having a massage as very special activities.

Dutch people are more budget-conscious than many other European travellers. They are often the ones to ask which holiday package or activity is the least expensive. On the other hand, Dutch people are experienced travellers and are open to trying new things. This makes them an interesting group to target with wellness offerings. Most Dutch people speak English well, in comparison with those from other European countries.

Dutch women are more interested in wellness activities than Dutch men are. The gender composition of the market for wellness holidays is around 60% women/40% men. Most Dutch wellness tourists are between the ages of 25 and 34 years.

## **Spain: Increasingly interested in wellness**

Spanish wellness tourists are often interested in wellness retreats, spas, detox or fitness programmes and yoga retreats.

Around 13% of all Spanish people report typically taking wellness holidays. This is an increase relative to 2019, when only 5% reported doing so. This trend is likely to have increased further since the pandemic. In addition, 60% of all Spanish people indicated that [the COVID-19 measures had made them more concerned with their mental health](#). Increased awareness about mental health and the experience of spending a lot of time at home are likely to result in higher demand for wellness holidays.

If you would like to target Spanish wellness tourists, be sure to translate your materials into Spanish. The ability to speak Spanish or having Spanish-speaking employees can make your destination more interesting to Spanish tourists.

## **Italy: Tourists who like to be pampered**

Italian wellness tourists enjoy being pampered and consuming luxury services during their wellness holidays. Destination spas, thermal therapies and wellness retreats are especially popular with Italians. They assign considerable importance to receiving high-quality services that allow them to sit back and relax. Italy itself is a popular wellness destination for both foreigners and locals. Italians are thus already quite familiar with wellness practices. Wellness trips are especially popular with elderly Italians, as well as with couples and families.

Italians are interested in mud-based therapies and volcanic mud baths (*fango*). Like Dutch people, Italians are relatively budget-conscious, and they are more likely to choose relatively inexpensive packages or activities.

If you would like to target Italians, be sure to translate your offerings into Italian. The ability to speak Italian or having Italian-speaking employees can make your destination more interesting to Italians. Good accommodations and good food are very important to Italians when they are holiday.

### **Tips:**

Offer local, nature-based products to your customers, in addition to the services you provide. French people are especially flexible with their spending, and most Europeans are willing to spend more money when their well-being is involved. It is important to ensure that the products that you offer are safe and sustainably sourced.

Inform yourself about the interests of different European nationalities and link this information to offerings that are unique to your destination. For example, target Dutch and British tourists if you have vast expertise in fitness programmes.

Attract Europeans by tapping into their interests, but be sure to distinguish yourself by offering something that can be found only at your destination.

Connect to wellness experts and wellness tour operators in the European countries that you would like to target. This is crucial to understanding the European mentality about wellness, as well as current trends and demands.

Identify the European countries that you would like to target. It is important to learn which wellness activities they are used to doing in their home country, so that you can offer them something different. For example, a visit to a hot spring is likely to be a special experience for Dutch tourists, because it is not common in the Netherlands. In contrast, Germans are accustomed to hot springs, and they are not likely to travel far to enjoy them.

## **4. Which trends offer opportunities in the European wellness tourism market?**

Europeans are increasingly interested in taking a holistic approach to wellness. Another important development is their growing affinity for fitness and nutrition. They consider it important to practice a healthy lifestyle in their day-to-day lives, and this continues to be important when they are on holiday. Sustainability is becoming increasingly important. Wellness and sustainability are closely associated in the minds of Europeans. It is highly important to consider how to include sustainability in your strategy.

Many Europeans are eating more plant-based foods and fewer animal products, like meat, milk and eggs. Dietary changes are an important way for Europeans to improve their physical and mental wellness.

Finally, digitalization and online platforms offer opportunities to deepen your engagement with your customers.

### **Holistic wellness holidays**

A holistic approach to wellness is becoming increasingly popular with Europeans. Mind, body and spirit are central to holistic wellness. The busy lives of Europeans and the effects of the pandemic can make them feel disconnected, burnt-out and unhealthy. To reconnect with themselves, travellers are increasingly interested in challenging themselves to develop both physically and mentally, so that they can be more resistant to day-to-day life at home.

Holistic wellness holidays often allow tourists to relax whilst also practicing self-development. Yoga and martial arts are examples of holistic activities, as it is a mindful physical activity. Many people practice yoga to connect

with their spirituality as well.

Wellness retreats can also adopt a holistic approach. One way could be to offer a programme that includes a morning meditation, followed by a fitness class and a massage at the end of the day. Balance is crucial during a wellness holiday. It is important for travellers to feel that they are working on themselves, whilst still feeling that they are on holiday.

One in every 10 Europeans is interested in going on a holistic wellness holiday (e.g. a Reiki or chakra-balancing treatment). These treatments often fall into the category of 'New Age' therapies that are not entirely science-based, but that have ancient roots in many cultures (e.g. South-eastern Asia) where the balance between body and mind balance is more prominent than it is in Europe. Such treatments in South-east Asia are expected to grow even more in the coming years. Examples include meditation, astrology, chakra healing and alternative medicine. Many Europeans have a desire to connect with more spiritual and holistic practices, and they are eager to explore them during their wellness trips. It is important for European tourists and tour operators to know that the treatments you provide are entirely safe.

Figure 5: Reiki is a form of energy healing, transferring energy from the healer to the patient



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The lines between the various dimensions of wellness dimensions are becoming increasingly vague. This is a sign of a more holistic understanding of what wellness is and how mental and physical health overlap.

For example, the [Amatara Phuket](#) wellness resort in Thailand provides holistic treatments based on traditional practices that encourage self-healing, energetic healing and re-balancing. In addition to these holistic treatments, tourists can enjoy cooking and making their own sustainable soap. They can also take day trips to another island and exploring the local lifestyle of Phuket.

## More Europeans do fitness regularly

Europeans massively adopted fitness during the pandemic. They are feeling a need to get well and invest in themselves whilst spending a lot of time at home.

It is important for tourists to be able to maintain their personal wellness routines whilst on holiday. You should therefore provide the tools that tourists have at home, so that they can continue their practices and feel healthy. This is especially true for secondary wellness tourists, who would like to maintain their wellness whilst on holiday.

Options could include providing routes for runners and cyclists, a morning yoga programme for yogis or a fitness area where tourists can use dumbbells or other equipment. Accommodating tourists at their current fitness level is crucial to their ability to maintain health during their holiday. This will ensure that they will feel truly revitalized when they go back home.

Fitness was once characterized by performance, strength and body shape. In recent years, the motivations of many Europeans have shifted to becoming healthy instead. Fitness has changed from being a burden to something that makes them feel good. For example, 70% of all wellness travellers would like to have a gym at the destination. This mentality shift has encouraged Europeans to adopt fitness more and to want to continue their routines whilst on holiday.

One example of a holiday that includes this mentality shift is provided by [Eat Well + Live Well](#). Their package holidays focus on fun and sporty activities, like paddle-board yoga, cycling tours and surfing lessons. Healthy vegan and vegetarian meals are provided each day. Instead of emphasizing weight loss and fitness, the

package holidays focus on having fun, being active and eating and feeling healthy. This can be more motivating for tourists.

## Wellness travellers assign more importance to sustainable travel

Sustainability is closely connected with wellness tourism. At least 55% of all travellers consider [sustainability important when booking holidays](#). It is important for them to know which sustainable practices you are applying. Many Europeans also associate sustainability with their own wellness. If you wish to target European tourists, it is essential to include sustainability practices in your wellness offerings.

Europeans will associate your sustainability efforts with the quality of the wellness treatments they are receiving. Minimize plastic packaging, provide locally and sustainably sourced products and optimize all accommodation to be as sustainable as possible. A majority (73%) of wellness tourists prefer eco-conscious accommodations. In addition to being good for the environment, sustainability will be attractive to European wellness tourists.

Europeans also consider it important for their holidays to give back to the local communities of their destinations. Offering local food, local professionals and local wellness products can greatly benefit employment rates in your area. Communicate to your visitors what you are doing to help your community thrive, so they will know they are spending their money well.

[Mbuna Bay](#) in Mozambique is one example of a sustainable destination . This resort provides employment to area locals, decorates its lodges with carpets and pots made by locals and serves locally produced vegetarian meals. Mbuna Bay offers hiking trails, wind surfing, yoga classes and the opportunity to relax in rich natural areas. They use storytelling and pictures to describe their sustainable characteristics on their website and Facebook page. This lets tourists know what they can expect and how their trip will contribute to improving the agriculture, economy and employment in the area.

[Bio Hotels](#) is another example of sustainable, eco-friendly accommodations. Their products are locally and sustainably produced, and the food they serve is organic. Their website provides extensive explanation of the benefits of a sustainable hotel to both visitors and the environment. Bio Hotels are becoming increasingly popular as destinations for Europeans. Certification can help to communicate your sustainability and market your offerings to tourists. In exchange for the certification, you will have to meet sustainability standards and pay a fee.

### Tips:

Learn how you can improve your sustainability by using biodegradable materials, reducing plastic and reducing CO2 emissions. Read our study on [how to be a sustainable tourism business](#) to find the best way to include sustainable practices and communicate them to your tourists.

Include as much nature in your environment as you can. Europeans love to immerse themselves in nature, and they love to be surrounded by plants, natural water and natural lighting. For example, you could offer an outdoor terrace, a nature-based treatment or an afternoon hike in a nature reserve.

## Vegetarian and vegan food options are in high demand with wellness tourists

More than three fourths (77%) of all Europeans want to stay healthy or improve their health whilst on holiday. A healthy diet is essential to improving health. Europeans are increasingly aware of their food choices, and they want to continue to be healthy whilst on holiday. Recent years have made Europeans much more conscious of



the unhealthy impact of eating meat. Many Europeans are eating less meat or have stopped eating meat completely.

Many Europeans are already vegetarian or vegan. People who are vegan do not eat any animal products. For example, they do not eat meat, cheese, milk or eggs.

A substantial share (**22.9%**) of all Europeans are **flexitarian**, meaning that they do not eat meat every day. More than half (57%) of these Europeans would like to become vegetarian, and 8% would like to become vegan in the future.

Compared to other nationalities, Germans are more likely to be flexitarian, vegetarian or vegan. All European countries are increasingly eliminating meat and dairy products.

Providing vegetarian and vegan meals is important if you want to attract Europeans. Being conscious and flexible with other diets is also important, as many Europeans seeking to improve their wellness would also like to improve their diet.

Keto meals, water-fasting periods and other diets are also popular eating patterns for Europeans. Knowledge about nutrition is very important to the health of tourists. Be sure to include an expert when planning your offerings.

Figure 6: To many Europeans, vegetarian food is associated with detoxification



Source: Shutterstock

**La Vida Surf** provides locally produced vegan and vegetarian meals to tourists after their day at the yoga and meditation or yoga and surf retreat. **Phuket Cleanse** in Thailand offers a variety of fitness, martial arts and nutrition programmes. Tourists are educated on the mechanics of muscle-building, fasting, weight loss and weight gain. At the end of the programme, tourists receive individual advice on how to continue pursuing their health goals at home. The facilities also provide workshops on vegan and vegetarian food, so that their customers can make delicious plant-based food at home.

## Wellness apps and social media

Social media, apps and technological tools are playing an increasingly important role in wellness. Many Europeans use apps to keep track of their fitness progress and diet. Meditation, fitness and yoga apps are also becoming increasingly popular with Europeans.

Examples of these apps include **MyFitnessPal** and **Headspace**. MyFitnessPal is a fitness and nutrition tracker. Headspace focuses on mindful meditation, yoga and fitness. Apps like these are becoming increasingly important in tracking, educating and assisting Europeans to live a healthy lifestyle. In addition, Fitbits or other wearable health trackers are popular with wellness tourists—especially those going on fitness, weight-loss or detox holidays. At least 10% of all travellers take exercise trackers with them on their holidays.

It is important to be aware of the popular apps Europeans are using. This can give you a better understand of how they approach their wellness efforts, and it can help and meet them at their current level of knowledge about wellness.

Instagram and Facebook are the most important platforms on which Europeans research their holidays before they go. For example, 15% of all Europeans have **based their purchases on the recommendations of a social media influencer**, and this is even more likely in the wellness industry.

Younger wellness tourists are likely to look up your Instagram account before booking. It is important for your Instagram page to be up to date. Remember to incorporate the atmosphere you offer on your Instagram. For

example, if you offer many nature-based products and services, include plants and natural environments in all your posts.

Google searches account for the largest share of how people find their wellness holidays. Whilst Google and social media platforms are very important platforms to include in your marketing strategy, many Europeans also base their decisions on suggestions from friends and family.

Whilst on holiday, 80% of all Europeans want to disconnect from their phones once they are on their trip. Reconnecting with themselves and their surroundings is more important to them than connecting over the internet. Digital detoxes (in which travellers take a break from phones, laptops and social media) are increasingly in demand. It is important for these tourists to be able to safely put away their phones in a locker or leave them in their room. They are likely to feel overwhelmed by social media, the news and large amounts of time behind a screen in their day-to-day life. A 'digital detox' allows more time to focus on themselves instead of on what the rest of the world is doing. Instead, Europeans are increasingly wanting to do something physically active during their wellness holidays.

### **Tips:**

Emphasize the benefits that tourists will experience in their mental and physical well-being to help them understand the holistic characteristics of your offerings.

Market your fitness offerings as an opportunity to improve health rather than appearance. Europeans are becoming increasingly motivated by the health benefits and fun that accompany fitness. They can get discouraged if fitness is only about weight loss or improved appearance.

Include vegetarian and vegan meals for your visitors. If you want to attract Europeans, it is also important for your website to communicate that your package is also suitable for vegetarians and vegans.

Read our study on [how to go digital in the tourism sector](#) and [how to start a travel blog](#) to improve your presence on the internet and social media. Keep in mind that online engagement with your visitors is especially important before and after their arrival. During a wellness holiday, many Europeans will not want to check social media very often.

This study was carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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