

Well-Being Tourism

Diversification Opportunities for Farm & Rural Businesses

A summary of the product development research, Winter 2005.

"I just need to get away – somewhere quiet, somewhere different where I can escape and recharge my batteries".

Does this sound familiar? Tourism South East (TSE) believes there is a growing interest in holidays and short breaks where relaxation, health and well-being are the focus. But what is driving this market, and what opportunity might this offer small rural businesses in the South East?

Live longer and healthier

The rise of obesity, coronary heart disease and respiratory ailments due to a more sedentary lifestyle, higher stress levels and poorer diet has made health an increasingly urgent issue for us all.

Stress has reached epidemic proportions and is one of the greatest health risks in developed countries. More than five million employees in the UK complain of extreme stress in their jobs and around 13 million days are taken each year in sick leave as a consequence.

We are increasingly looking for ways of improving our health and well-being, taking individual responsibility for making lifestyle choices and decisions. We increasingly subscribe to the belief that 'prevention is better than cure' and consider money spent on relaxation, physical activities and pampering as a form of "private healthcare".

The combination of media and government interest in the state of our health, poor diet, lack of exercise and adverse effects of stress, is also leading to greater public awareness and action, evidenced for example by the increase in gym membership which has risen by 25% since 2002.

The Government White Paper on Health and the integrated Physical Activity Plan highlight the need to improve the physical and mental health of the nation by reigniting our interest.

Agencies like Countryside Agency (Natural England from Sept '06) and The Royal Society for the Protection of Birds have developed strategies geared towards enticing us outdoors, re-connecting us to the countryside and wildlife to improve our individual well-being.

What is health & well-being?

The World Health Organisation now defines health in terms of preventing disease and stress with an active lifestyle achieved through taking personal responsibility for lifestyle choices.

We generally associate health with the physical rather than the mental, whilst well-being is more about our state of mind. However, well-being can be seen as combining physical, nutritional, mental, spiritual, social and emotional aspects of life in such a way as to ensure positive health and maintain optimum quality of life.



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Who are health & well-being visitors?

With health and well-being affecting us all, the potential market is substantial. However the highest value sector currently relates to those providing health and well-being services to people in upper and intermediate management professionals or those with administrative occupations.

A recent national well-being marketing campaign identified three groups that are most likely to be interested in health and well-being holidays: affluent couples and singles without children, wealthy families with children aged up to 15 and women who holiday with friends.

Growing interest

The growing presence of spas, health clubs, gyms, complementary & beauty treatment providers and outdoor recreation operators is arguably attributable to our increasing interest in health and well-being.

In 2004 three in ten UK adults reportedly had a health or beauty treatment in the previous 12 months, spending almost £100 each, putting the estimated value of this market at £1.45 billion.

Many of us see a "Spa" as the perfect solution for restoring health and well-being. The UK spa market is in its infancy with only 1% of the population being regular spa-goers. However UK spa business operators are seeing encouraging sales growth, and this is set to remain buoyant for the medium term. Coupled with a growing desire for hotels to make themselves different from their competition, consumer demand has contributed to a 20% annual growth in the number of spa establishments over the past 8 years.

Spas may be at the centre of the healthy living revolution but the offer of other health-tourism is developing rapidly. For example, the number of activity holidays taken annually by UK consumers increased by over 11% in the five years to 2003, reaching in excess of 15 million trips.



What are the Key Market Factors for the South East?

The potential future demand for health-tourism services is promising and has initiated a world-wide mobilisation of health-conscious tourists. The European Travel Commission are certain that health consciousness and related tourism activity will increase further.

Although this may not necessarily influence the volume of tourism activity overall, it will certainly influence decision-making with regard to destinations and visitor behaviour during holidays. Destinations that are perceived as 'less healthy' will be more quickly avoided than in the past. Active or activity holidays will increase in popularity, as will breaks that offer the chance to escape, relax and unwind. The demand for facilities that correspond to these types of holiday will be increasingly preferred, and this is where the South East region could mobilise its resources.

The South East is well placed to reap the benefits of this growing market and has 4 undisputable strengths in the context of health and well-being tourism:

- a significant proportion of high value, protected landscape;
- close proximity to a substantial potential market;
- strong transport links;
- a wide range of things to see and do.

The SE has a varied and appealing natural landscape, with over one third of the landscape holding designated status – there is the New Forest National Park and proposed South Downs National Park as well as 9 Areas of Outstanding Natural Beauty (AONB) and vast areas of Heritage Coast providing tremendous opportunity for health and well-being tourism.

Possible potential markets include residents from London and adjoining regions like East Anglia and the Midlands, the near continent and those already living in the South East. With strong transport links and good infrastructure there is further potential to capture those arriving in the UK from overseas at London and regional hubs including Heathrow, Gatwick, Southampton, Dover, Portsmouth and Eurostar stations. As well as the leisure market, there is also scope to look at the commercial / corporate sector offerings.

The SE has a great range of things to see and do for those on a health and well-being break or day trip: 500+ golf clubs, 250 riding schools, 175+ water sport centres, over 130 spas (including spa salons) and nearly 100 outdoor pursuit centres. The region also has rising numbers of businesses producing high quality, food and drink.

Despite increasing development pressures on the region, a significant proportion of the South East retains an aura of tranquillity, perhaps all the more noticeable given the contrast with nearby bustling conurbations. Certain geographic areas offer immediate well-being potential due to their natural features, feeling of tranquillity and the potential to escape (New Forest, the Downs Cotswolds and vast coastline for example). Other areas have enormous scope but are less immediately apparent to potential consumers. This is partly due to the overall erosion of tranquillity from residential and commercial development. Research conducted for the Council for the Protection of Rural England found that the tranquillity of the South East had eroded faster than any other English region between the 1960s and 1990s, with less than 40% of the area retaining a tranquil status approaching the end of the last century.

This overall erosion of tranquillity in the region makes it less obvious for consumers to appreciate the potential of less well known areas and rural tourism businesses planning health and well-being ventures will need to work hard to promote their relative tranquillity as well as their actual product offer.

For the South East as a whole the key market factors with potential to influence this market are:

Medium Importance	High importance
<ul style="list-style-type: none"> • Increasing levels of disposable income • Changing age dynamics of the population • The 2012 Olympics • Increasing risk of world health threats • Limited well-being time in day to day lives • A growing convenience culture – tourism on demand • Desire for new experiences • Trend for well-being products as gifts and corporate incentives • Transport issues and accessibility of the South East • Mixed consumer perceptions of farms as a base for well-being experiences • The need for greater social inclusion • Growing interest in, and supply of, local food • High number of ports offering an opportunity to capture inbound visitors for well-being breaks before they move on to other destinations • Lack of recognised quality standards or assurance scheme to underpin the visitor offer (except accommodation) • Increasing availability of information on the web • Political support for health and well-being • Generally affluent population in the region • Limited supply of tourism businesses that genuinely meet well-being criteria 	<ul style="list-style-type: none"> • Desire to live longer, healthier • 24/7 lifestyles & increased stress • Perceived image of the SE being less tranquil than other regions • Increasingly sedentary lifestyles of adults and children • Growing awareness and education of health and well-being issues, benefits and desirable experiences • Proximity to London and other major consumer markets • Competition from UK & overseas operators offering well-being experiences • The vagaries of the British weather • General consumer lack of awareness of what is on offer in the South East • Increasing promotion of well-being • An opportunity for more existing rural tourism providers to promote their health and well-being credentials • A need to generate a well-being experience 'brand', and a need for more collaborative working between well-being providers to show case and raise the profile of the region's offer • Substantial AONBs, National Parks and Heritage Coast • Large number of things to see and do in the South East • A growing number of rural and farm businesses looking to develop new tourism enterprises • Need for promotion activity to highlight the potential of this sector

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How can you capture this market opportunity?

Spas, health clubs, gyms and high street therapists have arguably led the way with regard to well-being experiences and facilities. But smaller rural tourism businesses have the opportunity to follow the Government's lead and capitalise on the rural and countryside assets afforded by their location, significantly adding value to health and well-being experiences.

Tranquillity, open countryside, space, lack of noise and minimal human presence are all examples of unique selling propositions for rural providers that can add to well-being seekers experiences and provide competitive advantage over some of the more traditional market providers.



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Smaller rural tourism businesses can also focus on their individuality, attention to detail, and personalised approach to offer many benefits that larger establishments may struggle to deliver.

The opportunity to provide activities and experiences that support health and well-being, and the accommodation offered alongside provide direct potential for rural businesses engaged in tourism. Some accommodation businesses even view health and well-being activities as a way of maintaining or improving their occupancy rates and tariffs, rather than being an additional income stream in its own right – it provides a way of making them stand out from the competition.

Themed marketing and imaginative event staging can particularly appeal to the well-being audience. Unique events staged infrequently and ideally rooted in the community, have a definite cache which can augment the visitor experience – activities that can only be partaken in at particular times of the year and which represent something to look forward to e.g. guided walks.

Promoting the health benefits of nature and the countryside

Regardless of where we come from, the presence of nature, wildlife and greenery, blue sky and water tend to make us feel good and help relax us when we're stressed. Nature-rich green spaces, with their seasonal changes and variety of colour, stimulate people to enjoy physical exercise, breathing fresher air in attractive surroundings. Research shows that they reduce anxiety by providing pleasant settings for physical activities, or just by being tranquil places to relax. Government policy even calls for green spaces and the countryside to be prescribed as part of the perfect medicine to help maintain and improve public health.

Independent research clearly shows that contact with nature, open spaces and the countryside brings considerable health and well-being benefits compared to an urban, enclosed environment. For example:

- blood pressure is significantly lower where runners on a treadmill overlook a rural scene compared to an urban scene;
- prisoners in cells overlooking farmland / trees experience 24% fewer visits to sick cells;
- patients in hospital with nature views stay in for less time, require less medication and have fewer negative comments in nurses notes;
- bronchoscopy patients in hospital experience significantly better pain control from nature scenes placed in front of them or nature sounds;
- dental patients observing a live aquarium are more relaxed at point of treatment.



What type of experience are people seeking?

The growing concept of 'well-being' is not yet something that we are all familiar with or consciously strive to achieve. As a result consumer demands are wide ranging and complex, with tremendous diversity in the type of experience that people are seeking.

There is no standard prescription for a well-being tourism offer, but TSE research has uncovered some common discernible themes centred around the things we like to do, typically a combination of the following:

- Tranquillity and calmness – somewhere relaxing, peaceful, close to nature, unspoiled countryside, remote;
- Passive activities and experiences – not always requiring physical effort, but which help relaxation eg. pampering & beauty;
- Enjoyable physical activities to help improve bodily health and mental alertness;
- Freedom, personal time and space – open space and private areas, with few rules / obligations / restrictions to adhere to;
- Provision of high quality food, preferably local, and seasonal;
- High standards, overall quality and personal service.

Tranquillity is paramount for those seeking more passive experiences and a clear link with nature and the surrounding countryside is expected. The Countryside Agency research into what tranquillity means to us revealed the following important factors: relative lack of presence of other people (compared to day to day living), a natural and open landscape, low noise levels and presence of natural water features such as rivers or coast.

These are features typical of protected areas such as AONBs, National Parks and Heritage Coast. With over one third of the South East designated under this status, there should be a sizeable opportunity for rural businesses in these locations to develop well-being products and promote their location benefits to augment the experience. Further details of their work can be found at www.countryside.gov.uk.

Country walks, massage, health & beauty therapy treatments, swimming, walking, horse riding and cycling are commonly identified as well-being activities, but there are a wide variety of potential experiences that people will consider depending on their circumstances. These can range from the traditional (for example painting or pottery) to the novel (quad bike hacking, zorbing).

The concept of a well-being experience goes further than just bolting on a treatment room to a B&B – the philosophy of well-being should be apparent throughout. Quality is paramount and attention to detail is key. Understanding your visitor's needs and mood are prerequisite. Going the extra mile and attention to detail ensure the total experience delivers what the visitor is seeking. We all like the friendly and personal approach to service and need to be made to feel special.

Many of us see well-being experiences as a short break, a weekend or night away, in addition to our main holiday(s). But there are also those of us looking for a 'quick fix' which may last just half an hour; and at the other extreme, those seeking an extended experience over many days or even weeks. The duration of the experience frequently reflects our lifestyle, commitments and stress levels at the time of booking.

A country estate might personify the ideal location for most people when thinking about a well-being break. However research shows that farms feature extremely well, as do country inns, village cottages, and rural hotels - all with potential to provide the ideal accommodation as long as the offer and experience can satisfy expectations.

Farms are particularly appealing for the fresh air, space, lack of people, scenery and tranquillity they offer but consider how you market your business carefully. However our research suggests that marketing yourself as a "farm" may also indicate an expectation of noise, smell, machinery etc.

An essential part of the health and well-being offer involves making the offer easy to find and book. Difficulties in the booking process result in frustration and rising levels of stress, antagonising the very purpose for which we plan a trip in the first place. We increasingly plan our lives by using the media around us, glossy magazine editorials, tube posters and portal websites like lastminute.com to find our well-being experience, but these aren't always viable promotion options for smaller tourism businesses.

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Some 'health and well-being' ideas for rural and farm businesses

The diversity of experience sought by consumers provides many potential opportunities to consider, but to focus in on some key areas for development, TSE have identified some potential opportunities for the smaller, independent rural tourism or farm business.

To capture the overnight stays market, TSE have identified at least 5 different types of health and well-being break you might offer:

- a rural retreat offering the chance to completely relax and escape from the rat race (eg. B&B accommodation with complementary and beauty therapy treatments);
- rural accommodation with the opportunity to get closer to nature through active or passive activities;
- a bodily fitness, de-tox or nutrition break;
- a sporting or activity break, mainly geared to outdoor pursuits;
- a 'destination spa' or high quality accommodation offering spa type treatments.

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There is also substantial scope for rural tourism businesses to partner with others to offer a joined up holiday/short break product. Local B&B or holiday let providers can link up with outdoor activity providers, spas or complementary therapy centre for example.

For those looking to offer day experiences or specialist activities there is potential to look at:

- outdoor recreation activities such as cross country riding or sailing;
- art and craft activities such as pottery;
- signposted, informative country walks and guided nature tours;
- a 'medi-clinic' or specialist activity centre.

Some proposals can involve substantial capital investment and risk and should not be undertaken without comprehensive business planning, market research and professional advice. It is particularly important to understand the competitive impact of the growing number of spas in the region.

Health and safety is also a paramount consideration, and there are legal, regulatory and contractual issues to consider when engaging with third parties or establishing your own health and well-being enterprise.



Being competitive and getting noticed

With more obviously tranquil English regions (South West, Cumbria etc.) developing their health and well-being activities and cheap flights, package deals and competitive overseas offerings providing direct competition you need to have a strong, competitive and visible product.

To be competitive your product offer needs to be attractive and transparent. Consumers want to know exactly what they're getting and what they are paying for in advance - with no hidden surprises. Whilst it's important to price competitively to make the offer accessible, it's also important not to under price. Consumers seeking a luxury, pampering and indulgent experience expect to pay a commensurate price – a low price can bring doubt about the quality of offer.

Your offer also needs to be visible to the consumer. Research shows that a large proportion of people are not aware of the many tremendous health and well-being offers that already exist in the South East. A carefully thought out promotion campaign is an essential component of a successful well-being venture. A strong internet presence is essential, and opportunities to collaborate should be explored wherever possible to strengthen the product offer and marketing and promotion activities. If you are located in a National Park or AONB, contact your local AONB/National Parks Officer to find out about collaborative marketing and other partnership/network opportunities: www.countryside.gov.uk/LAR/Landscape/DL



This summary is supported by detailed business guidance materials published by TSE to provide unambiguous direction on the key issues to consider for each of the opportunities identified. The guidance provides considerable depth to the above opportunities and includes case studies that highlight the potential and practicalities of starting and running ventures such as these.

For further information about this study or to order a large print version, contact:

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