

SB WELL



European
Regional
Development
Fund

TARGET GROUPS FOR WELLBEING TOURISM

- An introduction to three
segments



Target groups for wellbeing tourism

- an introduction to three segments

This booklet is for you who are working in the tourism industry or in a tourism related business and wants to attract wellbeing tourists.

You will find an introduction to three interesting and growing segments. Each segment has preferences for wellbeing tourism offerings which are defined as sustainable and supporting harmony and balance of body, mind, and soul.

Meet the Sustainable Idealists, the Curious Explorers, and the Peace of Minds. Who are they? What are their travel motives?

SUSTAINABLE IDEALISTS

Consider environmental aspects when travelling. Prefer a clean and less crowded destination that protects the environment and offers green and sustainable solutions. Want to hike or go on long walks in nature, eat ecological food, have cultural experiences, and learn something new.

CURIOUS EXPLORERS

Want to explore and understand the country and destination they visit. Value authentic and unique nature and culture experiences, local food, and meeting the locals. Seek surprises and unexpected details. Find it important to care for nature, help others, and live a healthy lifestyle.

PEACE OF MINDS

Want to use the holiday to increase health and balance of body and soul, to find inner peace, and to enjoy the health effects of nature. They seek simplicity, relaxation, and new energy. They like to connect with likeminded and to find themselves.



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Introduction

The mindset and demand of travellers is changing. There is an increasing consciousness on sustainability and the negative effect tourism can have on environment and local societies. At the same time travellers increasingly seek to increase personal wellbeing to reduce stress, boost health and life quality, bring joy, and connect to the inner self and to others.

Travellers for whom sustainability, harmony and balance for body, mind, and soul matters are rapidly growing in numbers. New target groups for tourism can be defined. In this booklet you will be introduced to three interesting segments: Sustainable Idealists; Curious Explorers; Peace of Minds. Who are they? What are their travel motives and preferences?

A segment is a set of individuals sharing similar needs or characteristics. Above average the Sustainable Idealists are concerned with sustainability. They want to respect local culture and the environment. Curious Explorers have specific interest in nature and in experiencing it on its own terms. The Peace of Minds aim for a healthy lifestyle, inner peace and vitality.

These three segments are defined cross border as South Baltic tourists. Some specific national characteristics are added for Sweden, Denmark, Germany, Poland, and Lithuania. Note that working with segments, one person can be part of several segments and their travel motives can differ depending on with whom they travel and what needs to fulfil.

A key to success for a business is to focus on the correct target market and understand the needs of the customer base. Insight into relevant customer segments will help understand the needs your offers should meet and how to align your marketing efforts and messaging strategy. Hence, choosing the right target group will make it easier for you to reach the right customer at the right time in the right place.

For inspiration on product development, marketing, and the other aspects of wellbeing tourism see also the other booklets in this series.



#WELLBEING



Wellbeing Tourism & wellbeing tourists

Wellbeing tourism is sustainable tourism that supports harmony and balance of body, mind, and soul of both the guests and hosts.

The concept of Wellbeing tourism is based on six aspects: environmental, social, and economic sustainability, and wellbeing for body, mind, and soul.

Wellbeing tourists are people whose travel motives are matched by wellbeing tourism products and services. Each of the three wellbeing segments described in this booklet is a set of individuals who have similar characteristics and needs. All six wellbeing aspects are relevant for them however, they vary in importance and are not equally defining the segments. For the sustainable idealists the environmental, social, and economic aspects are particularly relevant. For the Curious explorer the focus is on environment, body, and mind. The Peace of minds have a stronger focus on body, mind, and soul.



The six aspects of Wellbeing Tourism



Environment: We limit waste, avoid pollution, use clean transport, and support conservation of natural heritage and biodiversity.



Social: We collaborate and interact positively with others, provide good working conditions, and treat everyone equally.



Economy: We co-create and share resources. We consider our activities' economic impact on everyone.



Body: We support physical health and pleasure for both guests and hosts.



Mind: We support peace of mind, clarity, and creativity with our activities, behaviour, and communication.



Soul: We support people in their being – free, joyful and present, in feeling connected to something greater than themselves, and in having a purpose.

A photograph of three young women laughing together in a warm, sunlit setting. The woman on the right is in the foreground, wearing a dark, textured sweater. The woman in the middle is wearing glasses and a dark top. The woman on the left is wearing a dark hat and a dark top. The background is blurred, showing a bright, sunlit outdoor area.

SUSTAINABLE IDEALISTS



MEET THE SUSTAINABLE IDEALIST

"I want to be a good example and do my best to travel sustainably. I am willing to pay extra to support the environment. I would like to stay at accommodation places that have focus on sustainability and eat at restaurants that serve ecological and locally grown food. I want to protect and support the area that I visit. I don't want to travel to destinations that are polluted and destroy their nature or exploit people."

» Size of the segment:

40% of all Germans = 33 million

33% of all Swedes = 3,4 million

19% of all Danes = 1,1 million

» Who they are:

Slightly more women than men.

Represented in all age groups

(slight predominance of the younger generations)

Represented at all levels of education

(slight predominance of higher educated)



WELLBEING SEGMENT: SUSTAINABLE IDEALISTS

Sustainable tourism is of growing importance. It is advancing as climate change and CO₂ emissions have moved to the top of the global risk agenda. Sustainability issues are growing as motives for travel decisions. This includes both environmental, social, and economic sustainability aspects.

The wellbeing segment, “Sustainable Idealists”, is highly represented in northern European markets. Sustainability considerations have “great” or “very great” importance for their future travel decisions. Sustainable idealists include for instance 40% of all Germans – equal to 33 million – and 33% of the Swedes.

The main travel motive is as for tourists in general to relax, recharge, and experience nature such as beach, coast, and sea. But to a much higher degree than tourists in general, they want to take care of the planet and the environment. Ways to do this are to benefit from the ecosystem services without over-consuming the planet’s resources. They reduce energy usage, reduce waste and greenhouse emissions, and promote recycling and reusing.

On vacation they feel a responsibility to protect the environment of the visited country. Therefore, the Sustainable Idealists prefer eating organic and locally produced food and consider choosing sustainable and environmentally friendly forms of accommodations. They are also willing to pay a small environmental tax if that is to be used on environmental improvements.

The Sustainable Idealists appreciate to experience the authentic local life and culture. They consider the effect of tourism on the community visited and find it important, that they do not disturb the daily life of the locals. They enjoy meeting hospitable people and want the money they spend to benefit the local community of the destination rather than an international company.

Clean destinations that are less crowded with tourists are preferred. Here hiking or long walks in nature are a sought for activity and in fact an important travel motive together with nature experiences in general.

As many sustainable idealists consider choosing nearby destinations to reduce the negative impact of transport on the environment due to CO₂ emissions especially when flying, tourism businesses should address this target group in the neighbouring countries and on the home market.



FACTS ABOUT THE SUSTAINABLE IDEALISTS

PROTECT THE
ENVIRONMENT

Holiday preferences

- » Nearly all sustainable idealists feel a responsibility to protect the environment in the country they visit and there is a high willingness compared to others to pay extra if the money is spent on environmental care.
- » The segment has an increasing demand for green and sustainable solutions and 6 out of 10 find it important that the destination has a focus on protecting the environment.
- » It is important that the destination is clean and unpolluted.
- » The primary motive for travelling is to relax and recharge and to have nature experiences.
- » They seek outdoor activity with a preference for hiking and long walks in the nature – which is a travel motive for 6 out of 10 on several markets.
- » It is important that money spend during the visit benefits the community by buying locally produced goods or shopping in locally owned shops.
- » Sustainable idealists do not want to disturb the everyday life of the locals.
- » To a higher degree than others they travel to learn something new, get inspiration and gain new perspectives on life.
- » They want to authentic experiences of local living, local culture and history.
- » For 4 out of 10 it is important that the destination offers a variety of ecological food and dining places.
- » Around 7 out of 10 on several markets consider choosing environmentally friendly and sustainable transportation to and on the destination
- » More than half this segment considers specifically choosing more sustainable and environmentally friendly accommodation.

HIKING AND
LONG WALKS

CHOOSE
SUSTAINABLE
SOLUTIONS

EAT
ECOLOGICAL
FOOD

SUPPORT THE
COMMUNITY

RESPECT THE
LOCAL LIFE

ACTIVITIES, PRODUCTS & SERVICES FOR SUSTAINABLE IDEALISTS







MEET THE CURIOUS EXPLORERS

"I want to go beyond the beaten track and find the hidden gems. It is interesting to meet the locals and feel like a local myself. I am curious about the culture, nature, and lifestyle at my destination. I like exploring and learning. It broadens my perspective and gives me great stories to tell when I am back home. I find it important to act responsibly by caring for nature and helping each other. I also take responsibility for my own health for instance by being in nature and eating healthy food."

» Who they are:

57% have a higher education
55% are women
59% are 45-70 years, but all age groups are represented

» Strongest values:

Learning something new
Taking care of nature
Experiencing authentic culture
Having unique experiences
Treating everyone equally
Having a healthy lifestyle
Helping other people

» Size of the segment:

Sweden: The segment constitutes 17% of the global travellers with an interest in Sweden



WELLBEING SEGMENT: CURIOUS EXPLORERS

Nature has in later years gained an even stronger, and renewed presence in human life. Spending time in nature is increasingly sought for and it is an important travel motive. Even more so after Covid-19. It is more commonly communicated that nature has positive effects on our health and is beneficial for body, mind, and soul. Globally, consumers are seeking calm more than ever and here nature offers a backlash to the stressful, noisy everyday life with its digital overload.

The segment of Curious Explorers prioritizes being close to nature when they decide on a holiday. They want to experience the countryside and engage in outdoor activities during all seasons. Actively, by exploring nature paths on foot or by bike. Or in a more contemplative manner, by just being in nature, watching the sunrise and sunset, sitting in a peaceful place letting the senses smell, see, hear, and feel the magic of the moment. The small adventures in nature are in demand, for instance cooking outdoors or experiencing local wildlife.

More than on an average the Curious Explorers (7 out of 10) seek unique experiences. They value surprises and unexpected details. They are attracted to what is genuine so they can get “under the surface” of the destination. This includes exploring nature and also local culture, local products, local food, towns, and lifestyle. They want the authentic experiences, to meet the locals, and feel like locals themselves.

With a high curiosity and wish to experience a lot, the Curious Explorers mostly combine both city and countryside in the same travel, often as a round trip. They want to learn and understand the local life and customs. Travelling becomes part of the personal development and personal optimization including new knowledge, good food, and being physically active. The Curious Explorers are above average letting health issues affect what they eat and drink.

Sustainability and environmental issues are increasingly connected to own health. A holistic view on health has taken hold, where sleep, exercise, mental focus, and diet play a role in increased well-being. The Curious Explorers care for a healthy and sustainable lifestyle – and are critical to mass consumption. Curious Explorers’ general beliefs are liberal and social as they strive to be open to all people and treat everyone equal.



FACTS ABOUT THE CURIOUS EXPLORERS

NATURE AND
CULTURE

Preferences, facts & figures

- » The majority of Curious Explorers prefer to travel in couples. 3 out of 10 want to travel with the family (adults and children). 3 out of 10 want to travel with friends or colleagues.
- » They prefer touring rather than staying the same place. 8 out of 10 combines city and countryside in the same holiday
- » Their holiday trip is longer than average – almost 4 out of 10 stays at least 8 days.
- » Nature is a top priority when choosing the destination, but culture is equally interesting on the holiday.
- » They are motivated by at least one of the following values when choosing a holiday: To learn something new; To experience authentic culture; To have unique experiences.
- » 69% want unique experiences during their holiday – which is more than average.
- » 6 out of 10 let general health issues affect what they eat and drink – compared to 5 out of 10 of people in general.
- » About half of the segment wants to be more relaxed and for 7 out of 10 "take it easy and relax" is valuable for their existence.
- » Particularly interested in: nature, culture, traditional food, cooking in nature, reading, and shopping.
- » They engage in many activities in nature all seasons and with low intensity: hiking, biking, canoeing/kayaking, enjoying great views.
- » For the Polish Curious Explorers Nordic Walking is very popular for 50+ during all four seasons of the year.
- » The German Curious Explorers are attracted to what is small, local, and alternative. They are outdoors in all kinds of weather.
- » For the Danes nature is a determining travel motive for the choice of holiday destination in both Denmark and abroad.

OUTDOOR ALL
SEASONS

HEALTHY
LIFESTYLE

ACTIVE AND
INTERESTED

AUTHENTIC
LOCAL LIFE

LEARNING

EXPLORING
THE UNIQUE

ACTIVITIES, PRODUCTS & SERVICES FOR CURIOUS EXPLORERS



A photograph of a person with blonde hair, wearing a dark tank top and leggings, walking away on a dirt path through a dense forest. The path is surrounded by tall, slender trees with thick trunks. Sunlight filters through the canopy, creating dappled light on the ground. The text "PEACE OF MINDS" is overlaid in a white, handwritten-style font in the center of the image.

PEACE OF MINDS



MEET THE PEACE OF MINDS

"I wish to slow down and have a break from my intensive challenging life. To find inner peace and gain new energy. I would like my holiday to support my health. To support wellbeing for my soul and for my body. To eat healthy food and to enjoy the healthy effect of being in nature."

» Size of the segment:

On average about 10% of a population.
Fast growing segment.

» Who they are:

In general, more women than men.
Living in urban areas.
Young and highly educated or middle aged to older women.

Often solo travellers, but they love to connect to likeminded.

» Motive to travel:

Recharging, personal care, personal growth, and health



WELLBEING SEGMENT: PEACE OF MINDS

An increasing number of travellers are searching for a break from daily life and for tools to recover from stress, an unhealthy lifestyle, technological overload, and high demands in performance. This search inspires or even determines their choice of holiday destination and content. We call this segment the Peace of Minds.

The general interest for health on holidays is massive. In one of the countries with the largest outbound tourism, Germany, three quarters of the population have declared that they are interested in health stimulating activities during their holiday. One third of these find wellbeing for the mind and soul the most important aspect. For another third it is the physical wellbeing. These two aspects are however closely related, and a holistic understanding of health is becoming more and more common among consumers. For some, a holistic health focus is a primary focus for travelling. An estimated 10% of travellers belong to the Peace of Minds segment and it is growing.

The growth of this segment is reflected in the increasing popularity of travel forms like for example pilgrimage, yoga, and mindfulness retreats. The wish for inner wellbeing, harmony, and balance, is expressed in the choice of activities. The most common are having healthy food and drinks,

experiencing the healthy effect of nature and to relax. Other activities and outcomes of specific interest are for example digital detox, finding oneself, and courses in relaxation.

The Peace of Minds prefer physical spaces that supports peacefulness and that has a natural element such as wood and green plants. They are attracted to nature and for instance forest bathing, winter bathing, and even sleeping outdoors. Food should be local and organic. Meeting others and connecting with likeminded adds positively to the holiday experience. They search for simplicity, desire to be present in the moment, and are open to spirituality in a non-religious way.



FACTS ABOUT THE PEACE OF MINDS

HEALTHY
FOOD

SIMPLICITY

EFFECT OF
NATURE

HARMONY AND
BALANCE

RELAX

INNER
PEACE

Preferences, facts & figures

- » Focus on health on a holiday is relevant for 76% (over 53 million) of all Germans. Of these one third are primarily seeking wellbeing for the body, another third primarily wellbeing for the mind and soul.
- » 9,9 million Germans are defined as “health tourists” (14% of the population) – not including specific wellness and spa tourists. 72% of them experience that their main holiday has a positive effect on their physical health and 27% return home with ideas on how to live a healthier everyday life.
- » Yoga is increasingly popular. In 2022 8.0% of Germans do yoga often, 3.4% sometimes do yoga, a total of 11.4% compared to 9.2% in 2018.
- » 26% that begin doing yoga do it out of personal interest in the mental and spiritual level. 64% because they want to improve their mental health, e.g. reduce stress.
- » When choosing a health activity, wellbeing for the mind and soul matters most for the 30-69 year old Germans. 28% of them find this aspect most important.
- » Bodily health is the most important aspect of choosing a healthy activity during a holiday for 48% of the 70+ German travellers.
- » 6% of the German population above 14 years are interested in courses in relaxation during a holiday.
- » 15% of the German population above 14 years hope to find themselves during their holiday. Highest among the 50-69 years old with 18%.
- » The number of pilgrims who finished the pilgrimage in Santiago de Compostela raised annually from just above 183 000 in 2010 to over 347 000 in 2019.

ACTIVITIES, PRODUCTS & SERVICES FOR PEACE OF MINDS



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Colophon

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Acknowledgements: Thank you to SB WELL project partners for contributions & review

Wellbeing concept based on: Lindell et al., 2022. ISBN: 978-91-89460-59-1

Layout: Glyholt Grafisk Design and F.H.U. Arkada

Photo credits: Vidūnas Kulikauskis (front page), Danish Tourism Innovation, Joanna Kohnen, Niclas Jessen, Robin Skjoldborg, VisitDenmark, Albina+Mihajlo, Gettyimages- Linnaeus University, Istock, Unsplash: Priscilla-du-Preez, Aurelia-Dubois, Maddi-Bazzocco, Arthur-Poulin, Geran de Klerk; Camønoen, Shutterstock, Pixabay, Linda Brolin Fotograf – Kollberggarden Wellbeing, Martin Hagemann- Vogelpark Recknitztal, Most Photos- County Administrative Board of Kalmar.

Available on: wellbeingtourism.com.

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Project

This booklet is produced in the project SB WELL - *Wellbeing Tourism in the South Baltic Region - Guidelines for Good Practices & Promotion* - with support from the EU Interreg South Baltic Programme. Project period 2018-2022. www.wellbeingtourism.com

The main goal of the project is to increase the awareness about wellbeing, create wellbeing in the tourism sector, and promote the South Baltic Region as an attractive wellbeing destination. The project defines wellbeing tourism as tourism that supports harmony and balance of body, mind, and soul for guests and hosts, in a sustainable interaction with the local community and environment.

Lead Partner



Partners

