

EUROPE: FRANCE

1. What is currently making news in your country when it comes to wellness or wellbeing?

FRENCH SPA ASSOCIATION SPA-A initiated a pioneering initiative concerning Eco-responsible Spa Management. The works were coordinated by EVEA TOURISME & IN-EXTENSO agencies, with the support of ADEME, French National authority for sustainable energy [Agence pour le Développement et la Maîtrise des Energies]. 15 wellness properties participated to the panel : urban spas, hotels spas, Thalassothérapies, balneo centers. The key learnings will be transformed into best practices and shared with the industry. The whole programme will be presented during COP21 [United Nations Programme for the Environment] that will be held in Paris and lead by French Président François Hollande, from November 30th until December 11th.

Mad about Cosmeceuticals. When polysensoriality gives way to technology, state-of-the-art formulas and understated packaging, what you have is cosmeceuticals. Cosmeceuticals lie at the crossroads between traditionals cosmetics, pharmaceuticals and medicine, and are enjoying a surge in popularity. This upmarket cosmetic science falls within the scope of expert treatments with highly technical formulas that satisfy our desire for eternal youth. With a market worth 540 millions euros in France, alone anti-ageing has become a sort of holy grail with cosmeceuticals leading the pack both in terms of market share and increasing renown, and this serves the interest of aesthetic medicine as well. Indeed, cosmeceuticals also aim to give answers to a clientele that resorts to injections and laser sessions where skin treatments, both before and after, have become necessary. Here in an underlying trend that has not escaped the notice of thalassotherapy centres, Spas and balneology centres. Some have already integrated in their offering the sector's leading brands – Skinceuticals, Filorga, Biologique Recherche..., even to the point of proposing invasive or semi-invasive techniques to clients during a treatment package stay. The lines are blurred between wellbeing, beauty and aesthetic medicine giving rise to complementary expertise so that tomorrow's outlook on beauty encompasses global wellbeing.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Impacted by the economic crisis, the French are focusing more and more on taking better care of themselves. 9 millions of them have turned towards wellness thalassotherapy, Spa, Balneotherapy and Thermal hydrotherapy in 2015.

The change in thermal hydrotherapy centres. Both operators and local councilors have become aware of the necessity to find new levers for growth. For operators, their differentiation strategy must above all be based upon their medical know-how. In the French healthcare market with thermal hydrotherapy programs that are authorized by Social Security, operators have the opportunity to position a new medical offering to reply to emerging therapeutic indications such as fibromyalgia, weight loss, dermatology and stress management.

Post cancer treatment programs become widespread in France. An increasing number of thalassotherapy centers and Spas are offering specific treatments to help people recover physically and emotionally after cancer.

New generation thalassotherapy inspiring clients to engage in a preventive health process while are enjoying their Thalassotherapy break and to enjoy the benefits of seawater: rich in trace elements and minerals essential to our bodily functions and is recommended for many disorders.

Wellness Tourism: Wellness Tourism is a major concern in France. A working group, led by ATOUT FRANCE Wellness Cluster, is in charge of taking France to the next level when it comes to Wellness Tourism, enhancing our urban spas, wellness resorts, sea-water spa/thalassotherapy centers, thermal spas in the whole country and promoting our expertise around the world. Wellness Tourism economy creates jobs. The analysis of major wellness destinations, both in France and overseas, reveals that a perfect command of the fundamentals is essential to a destination's success, whether for the facility itself (employee skills, level of medical offering expertise, the variety of wellness solutions, the modernity of its facilities) or for the destination's dynamic (quality and variety of accommodation, restaurants and shops, promotion of the region's unique resources by the tourist board with both public and private market players). The analysis also reveals that each destination must, and this is increasingly the case, word their offerings in appealing and tangible propositions, like in Carnac where the various wellness solutions all stem from a global concept based on sustainable development and organic products or in Aix-les-Bains where health and fitness are clearly targeted. We have also seen destinations develop their accommodation capacity for business travel or create kids clubs in order to diversify their customer base and expand their reach.

Maintaining or improving wellness is a well-established trend that represents great opportunity for the future with the ageing population and growing access to travel by millions of consumers all over the world.

Without a doubt, France has the potential to capitalize on international markets for growth thanks to its major resources and rich wellness offering. This implies that efforts to improve quality and innovate must be continued and internationalization processes must be accelerated. Thalassotherapy centers, thermal resorts and spas use the three waters; the wellness tourism sector has confirmed it has numerous classifications of sub-products, from the medical spa to weight loss properties, from beauty spas to health clubs or mindfulness retreats. I would like to see a collective

commitment to the growth of wellness tourism in order to avoid counter-productive actions and better promote this wealth of resources from a national perspective.

Wellness Living Communities/Real Estate: Wellness is a key component of our social environment. It is no more a trend. During the Women's Forum [Building the Future With Women's Vision] that will be held in Deauville, France, October 14-16, 2015, AccorHotels will lead a session on the "Future of Wellness" presented by Aldina Duarte Ramos, Global Wellbeing Product Director for Accor Hotels and Actress, wellness influencer Marisa Berenson. French Industry Secretary of State, Martine Pinville will be concluding the session.

Fitness The breathwork, designed to ideally complete the benefits of fitness, develops techniques that help each participant to increase awareness of their lung capacity, which is only partially used during normal breathing. Three protocols take place in different space according to the objective: in a pool of heated seawater (34°C) to help let go; in the fitness studio for focus and awareness of movement: Qigong postures for a sense of inner breathing, primitive dance and yoga exercises that are grounding and improve balance and stability; and outdoors to re-energize both body and mind. The sessions last for 30 minutes and include exercise such as sighing, stretching, yawning, rocking movements and immersion in water. The Waff workshops. The Waff is an air-filled polyurethane cushion that comes in 3 sizes. Designed to adapt to every shape and size, it reacts to the user's movement requiring a continual search for balance. Associated with specific exercises, it is possible to work on improving posture, weight transfer and joint mobility, release muscular tension, activate the cardiovascular system and strengthen the muscles of the upper and lower limbs and abdominal muscles.

3. How would you describe the state of workplace wellness in your country?

Even though, in France, the OSI (International Social Observatory) recently made public a "commitment to workplace wellbeing and universal right to health". This document includes, for the moment, ten or so signatory companies and trade union organizations (GDF Suez, Schneider-Electric, Areva, RATP, Thales, La Poste, Malakoff Médéric, CFDT - French Democratic Confederation of Labour, CFE-CGC - French Confederation of Management, General Confederation of Executives, UNSA - National Union of Autonomous Trade Unions and the ETUC).

However, other big names already figure in the 'Great Place to Work' Hall of Fame: Microsoft, Valrhona, Decathlon, American Express Carte, Leroy Merlin, PepsiCo as well as Leboncoin.fr.

These companies all have in common an investment in improving working conditions and employee wellbeing: exemplary management, employee retention, salary levels, work-life balance, social benefits, diversity, development...

An investment that benefits employee and employer alike as all specialists agree on the fact that employee wellbeing improves overall performance levels and reduces absenteeism. Employees themselves share this vision: 95.7% of them – when asked about stress at work – admit that wellbeing is key to performance and 55% think that their employers lack initiative in this area.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

There's not a tabloid, TV news program or conversation that doesn't bring up the subject of the economic crisis. At the same time, period of crisis are often favorable moments for seizing opportunities and accelerating projects.

Thalassotherapy, news centers with Concarneau (2015 July, HMC groupe) and Trouville (2015 January) – Renovations, in particular Thalazur Arcachon and Thalazur Saint-Jean-de-Luz but also Grand Hotel and Spa Saint-Jean-de-Luz. Miramar Port Crouesty (2015 May).

While awaiting larger investments, many center have been forced to look again at their strategic positioning and revitalize their offering with the launch of new courses of treatment and new treatment in order to distinguish themselves from the competition.

For the Spas, the inventory of high-end with/without a Spa was impacted by the new (NN) French classification system (implemented in July 2012). Today, we have enough perspective on the volume of new rated hotels to be able to evaluate the real share of hotel Spas in the French hotel industry.

We observed that 48% of the 5-star hotels in France have a Spa, representing close to 1 hotel in 2, compared to 17% in the 4-star category only concerns 1% of the rated hotels.

It should be noted here that the number of 3-star hotels grew by 38% in 4 years as a result of the new classification system.

Of the total number of 3 to 5-star hotels in France, 6% of them provide their clientele with a real Spa with a dedicated treatment offering. This offering is concentrated in the highest end of the market. Indeed, all categories taken together, hotels with a Spa only represents 5% of the establishments. These figures are taken from the quantitative and qualitative analysis of the French Hotel Spa Industry will be available at Atout France library at the beginning 2016 year.

5. Whose responsibility is it to create a well world?

Jules Renard, very famous French author used to say: “dreaming is the luxury of mind to create an ideal world”. For me create a well world is synonymous with beauty, creation, eternity and know. Today, real well world is not about the accumulation of ostentatious signs, but rather sharing emotions, delighting the mind, turning ideas into reality and making what is impossible, possible! A well world is also

related to defying what is evident and banking on discreet yet truly comforting places which allow forgetting the fierce obligation to always be fashionable.

We all have a role to play. We need to be curious, share and not be afraid of sharing. I like the following quote from French Author Victor Hugo: “Nothing is more powerful than an idea whose time has come”. And time is now!

SUBMITTED BY:

Name: Isabelle Charrier
Title: Founder and Managing Editor
Company: EMOTION SPA Magazine
Email: icharrier@emotionspa-mag.com
Phone Number: (+33) 680 250 332



CONTRIBUTORS:

Aldina Duarteramos - Accor and SPA A Association
Danielle Rouault- CINQ MONDES
Jean-Luc Pleuvry - Thalazur
Ghislain Waeyaert - Deep Nature

