



## EUROPE

# FRANCE

### 1. What has been making news in this country in terms of the business of wellness?

There have been many new wellness establishments in France in 2018, along with future projects. Among the most important: For Spas Hotels in France: The first semester of 2018 has seen a great number of hotel spa openings, demonstrating the sector's sustained dynamism. There are three French spots creating the buzz: 1) Champagne: The highly anticipated Royal Champagne Hotel & Spa in Reims. Over €30 million are believed to have been invested in this incredible renovation undertaken by an American couple, owners of Leclerc Briant champagnes. Overlooking Reims, the capital of the Champagne region, offering stunning views over the hills and located on an UNESCO World Heritage Site, this five-star hotel has 49 guest rooms (40-45 square meters) and every single one offers breathtaking views of the vineyards. The hotel will also have two restaurants, including a gastronomic one, and also a bar, three spacious terraces, a 1,500-square-meter spa in collaboration with Biologique Recherche and two swimming pools, and many lobby areas. 2) Paris: Hotel Lutetia & Fauchon: After four years of renovation, the Hotel Lutetia reopened its doors in June. The only luxury hotel this side of the River Seine is now a member of the highly select collection The Set (Conservatorium in Amsterdam and Café Royal in London). This renovation was orchestrated by renowned architect Jean-Michel Wilmotte, who set his sights on contemporary and ultra-chic interiors. Created from scratch for the "new" Lutetia, the Akasha Spa is a 700-square-meter luxurious haven of peace, offering a holistic approach based on the four elements (air, earth, water and fire) in addition to its sublime 17-meter pool. The spa has partnered with treatment experts Carita and the Swiss cosmeceutical brand Cellcosmet. The delicatessen Fauchon and upmarket hotel group Esprit de France have joined forces to create and operate the first Hotel Fauchon in the capital, scheduled to open this summer. The five-star hotel will be managed by Jérôme Montantème and takes up quarters in the brand's historic stronghold at 11 Place de la Madeleine. Located just a stone's throw from Rue Saint-Honoré, Place de la Concorde and major departments stores, this new address has been imagined by architect Richard Martinet, a true artist when it comes to luxury hotel design. The prestigious hotel will include 54 guest rooms, including 11 suites, all overlooking Place de la Madeleine or Boulevard Malesherbes and a Carita Spa. For the thalassotherapy, this sector has been recording continuous growth these past five years. This bright

spell has inspired municipalities along the coast to find investors so that they too can benefit from the highly sought-after blue gold. At a high-growth stage with its establishment on the Channel, an opening in Boulogne-sur-Mer (Pas-de-Calais) planned for 2019 (150 jobs, €50 million investment), Prévithal is keeping a watchful eye on this coastline. 2021: a new center in Berck. The building permit for the future residences Altéia, in the south of the seaside resort Berck, was approved last May, with opening scheduled for 2021. This 13,759-square-meter project, driven by the Quartz Group (Altéia's real estate developer), Créer Promotion (in charge of marketing) and the Relais Thalasso group, will include a hotel paired with a thalassotherapy center, accommodations and a restaurant. The creation of 80 jobs, 110 in high season, is also in the pipeline. For Thermal Spa: Nouveau Thermal Resort in Franche-Comté. This spring, the Caisse des Dépôts, Santenay Town Council and the Bourgogne-Franche-Comté Region presented a new project for a thermal resort and hotel residence with the operator Valvital. To fund the project, which requires a €13 million investment, the Caisse des Dépôts raised €1.4 million equity, and by doing so has reasserted its role as an investor in projects of public interest. A new stage for the future of balneotherapy in Châtel-Guyon began last July. Indeed, the group France Thermes has entrusted a construction company from the region, Eiffage Auvergne, with its balneotherapy resort project, and the building works were set in motion at the end of the summer. The project plans a unique site for this future 15,000-square-meter resort, with a new-generation, two-floor balneotherapy center and different integrated facilities, including a spa with indoor/outdoor pool and premium balneotherapy facility, a four-star tourism residence with 90 apartments, a restaurant with a 90-seating capacity that will also be open to nonresidents, a senior services residence with 60 apartments, and a research and training center dedicated to studying bacterial flora. The particularity of this innovative project is that the future establishment's numerous and varied purposes required carrying out specific, highly advanced studies before obtaining the final project's execution plans. By investing in these complementary facilities, France Thermes seeks the long-term positioning of balneotherapy in Châtel-Guyon by developing a specialized and attractive offering focused on preventive healthcare, digestive wellness and nutrition. The opening is planned for Spring 2020 with a global investment of €35 million. 2022: Grand Nancy Thermal. Last July, the Métropole du Grand Nancy intercommunal council announced its decision to choose ValVital to carry out the Grand Nancy Thermal project. This large-scale project will be located in the heart of Nancy and is poised to turn the Grand Est region into a key balneotherapy, wellness and leisure destination. Unique in France, the Grand Nancy Thermal will be a modern water-based facility for fitness, relaxation, wellbeing and health spread over 20,000 square meters with a health/sport center (2,459 square meters of pools and water leisure park), a wellness/health center (895 square meters of pools dedicated to wellbeing, built around a circular swimming pool), a balneotherapy center (329 square meters of pools and 85 treatment rooms, representing a client capacity of

15,000), as well as a residential hotel with 76 apartments enabling guests to directly access the facilities in their bathrobe. Cost of the project: €97 million.

**2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

**BEAUTY & ANTI-AGING**

Great growth of cosmeceutical brands, now essential in the spa offering in France. Cosmetic Revolution with The Great Creme by Biologique Recherche, inspired by Epigenetics.

**COMPLEMENTARY & ALTERNATIVE MEDICINE**

D-LAB, the French leader in nutricosmetics for beauty professionals for the last 10 years, launches the "Inner-Experience" concept, dedicated to spa hotels, to offer a new customer experience by inviting to nutritional journeys combining the pleasure of cosmetics to the delight of nutrition with an explicit base line "Feel Good - Eat clean."

**FITNESS & MIND-BODY**

With 2.8 million French practicing yoga regularly or occasionally, this is the number one wellness practice in France. The boom of diagnostic tools in fitness, such as the Bellow assessment, gives precise analysis of your health, including your level of fitness, stress, anxiety, motivation and analysis of body areas.

**HEALTHY EATING, NUTRITION & WEIGHT LOSS**

The food we eat will be healthy, fun and artistic. Millennials in France currently represent 16 million people and a third of the active population. In 2020, they will represent one in two workers. According to a recent study by Kantar, the first lesson to be learned is that in 2018, the millennial generation will combine healthy with guilty-pleasure foods for their daily meals: 15.6 is the average number of foods in the organic/green categories bought by millennials. In their shopping trolley, they will combine the basics for semi-homemade cooking with healthy products (organic produce, vegetables, herbal teas, fruit purées and cereals) to compose fresh, fun and colorful aperitif buffets, inspired by salad cakes, mermaid toasts and terrarium cakes, which have become all the rage.

**PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

The appetite for products designed to improve sleep is very high. Smart mattresses from Serta Simmons Bedding and offshoots Tomorrow Sleep and Eight Sleep include features that analyze REM cycles for up to two people in bed, wake you up via a smart alarm that knows when you're in a stage of light sleep, and allows you to control the temperature for optimal sleep climate.

**SPA INDUSTRY**

The wellness market is booming. There's further proof with the latest figures published by INSEE, confirming that the wellness market is growing by 7 percent each year, with 2 million French people regularly scheduling a spa visit, turning their back on beauty salons that, for the most part, fail to fulfill all their expectations.

## **THERMAL/MINERAL SPRINGS**

The thermal sector is growing fast and is also the driving force behind new investments (see our article “Balneotherapy, newfound health” in SoW#3). Between 2016 and 2020, €800 million could be mobilized (compared with investments of €400 million undertaken between 2010 and 2015). With the Grand Nancy Thermal Centre scheduled for 2020, the plan to relaunch Châtel-Guyon, the renovation of Thermes d'Allevard and Brides les Bains, the Thermal sector is likely to get extensive coverage.

## **WELLNESS LIFESTYLE REAL ESTATE**

Sustainable development has become a part of our business in 1995. In the field of hotels and hotel spas, 23 years later, we observe a multiple hotel offering, but with little “Eco Spa” put forward. Without wanting to create polemics, we must recognize that in our professions, ecology has difficulty in imposing itself. However, the subject has many interests both in terms of marketing and finance.

## **WELLNESS TOURISM**

Most people are looking to the southern regions and Austria if they want to take a wellness break.

## **WORKPLACE WELLNESS**

The notion of wellbeing at work is sometimes mobilized to talk about actions that have little impact on the actual organization of work in teams. This is the case, for example, of the provision of sports facilities, massage sessions or dietary advice. The procedures proposed by the INRS are of a different nature: They are part of the legal obligations to build a psychosocial risk prevention approach.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

1) The change from “Hotel & Spa” to “Spa & Wellness Resort” has become essential. Today, with the fast-growing trend for health-conscious trips, the spa is key to a hotel's value propositions if it is to attract this new customer segment, made up of high income, high-stressed city dwellers looking for healthy activities and options. A 5th consumer segment has emerged, alongside the classic segments of the hotel industry—leisure or business, individual or group business. Wellness travel is moving beyond its niche and can no longer be confined to a mere sub-segment of the individual leisure market. With specific interests and expectations, wellness-minded travelers now form a target in their own right for the “wellness resorts” of today and tomorrow. 2) The increase of specialized programs: Because wellness-minded programs not only integrate physical activity and healthy nutrition, but must also meet the need to reconnect body and mind, new disciplines taught by experts have emerged. Clients are introduced to yoga, tai-chi, qigong or meditation for more harmony and balance. 3) Physical activity at the heart of health and wellness programs: According to a survey conducted by Opinion Way, 85 percent of French people think thalassotherapy is particularly well-suited for both competitive and recreational athletes. For people looking to jump-start a fitness routine, improve their performance and recovery, or try out a new activity, the thalassotherapy break is the ideal moment for them to focus on their objective. 4) The increase of high-tech

treatments: In many centers, technology is creating new ways to engage clients with their wellness and increasingly specialized techniques are being used, integrated into a program or serving as diagnosis tools at the beginning of a stay. There are a certain number of equipment and tools, such as the OligoScan that measures an individual's needs in minerals and trace elements or the PhysioScan that claims to balance electromagnetic radiation. Clients hooked on high tech can now discover the Miltaled (magneto-infrared laser technology), the infrared sauna, Fit 3D (360° image of the body, results interpreted by a sports coach), and even virtual reality.

#### **4. What do you see as the greatest strength of the wellness market in this country?**

France has a particularity in terms of wellness. They offer three concepts of health by water: thalassotherapy with seawater; thermal spa with spring water; and spa, the most recent but offers multiple experiences. Thanks to this unique expertise, France is now the 4th largest destination in terms of revenue. In 2017, there were 8.3 million wellness travelers in France, an increase of 5.5 percent per year.

#### **5. What do you see as the greatest weakness of the wellness market in this country?**

The diversity of the wellness offering in France is also its weakness, particularly when explaining the concept of thalassotherapy to foreign customers, which represents only 20 percent. The accessibility to certain destinations by direct air links is also a brake for foreign customers.

#### **6. What do you see as the biggest opportunity in the wellness market in this country?**

The wellness market has grown a lot in France in the past five years with many renovations in the field of thermal spa, but also the creation of many new spas since 2017. The number of spas increased by 47 percent between 2013 and 2017, registering an annual growth rate of 7.7 percent since 2007. France has 3,556 urban spas or accommodation, employing 70,232 employees and generating an income of 3.12 billion euros, making it in 4th place worldwide, while it was only 7th in 2007.

#### **7. What do you see as the biggest threat to the wellness market in this country?**

To continue to grow, the wellness market in France must absolutely appeal to foreign customers. Numerous promotional activities are conducted via the Cluster Atout France to promote wellbeing in the priority markets of Belgium and Switzerland, as well as Russia, which is part of the 2019 conquest objectives.

#### **8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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