



# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Perhaps one of the most striking things about the wellness industry in Austria is its sheer size relative to the size of the country. With a population of only 8 million, Austria has a wellness industry that can boast of \$15.7 billion in annual expenditures, which account for 3.7% of GDP. To put that in perspective, of the top 10 wellness markets worldwide (Austria ranks 5th), the next largest contribution to GDP can be found in Italy at 1.3% --less than half of the Austrian figure.

Wellness takes a prominent place in Austrian economic planning and the industry receives generous government support to further its development. It is seen as a patriotic act when Austrian politicians announce that they are taking a wellness vacation. And one thing they can expect when they do so is wellness at a very high standard—because Austria has some of the best wellness hotels in the world. And because there are some 1,100 wellness hotels, Austrians don't have to look too hard to find one.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

Austria excels in the category of thermal spas, both in terms of numbers and quality, and a particularly positive trend has been the improvement in quality during the past few years, a trend that has been driven by increased competition.

#### Beauty:

With one of the largest organic food sectors in the world, it is not surprising that in Austria there is a huge trend toward organic cosmetics of regional origin, because customers want what goes onto their bodies be no less healthy than what they put in them.

**Fitness:**

Austrians prefer to combine fitness with fun, which means physical activity in a natural environment, whether it be Nordic walking, skiing or hiking, and that means that almost all wellness hotels include such options in their offers.

**Nutrition:**

Austrians are unusually attuned to issues related to food and the environment. Regional is the new organic, and there is an increasing desire to source food locally, not only in the interest of sustainability, but also in a quest for higher quality.

**Wellness Tourism:**

Health tourism has a three-hundred-year history in Austria, and recently the country has built on this historical foundation to integrate wellness in the larger framework of health strategy. Because demographic developments are shifting health policy to central stage, the development of health and wellness tourism is also becoming a national priority.

**Wellness Communities or Real Estate:**

Wellness is not really much of a theme in real estate development in Austria, but what is increasingly a hot topic is making already existing communities healthier places to live. Money is increasingly being invested at the community level to improve quality of life for residents by making the living environment more health promoting.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The Austrian (and German) health tourism industry was instrumental in the late 1980s and early 1990s in extending the definition of wellness to include its range of leisure products, which focused on pampering and rejuvenation. Health promotion played a much less prominent role in the Austrian wellness definition back then, but recently one of the big trends in the Austrian wellness industry has been a reconnection with themes that were part of the original American definition of wellness: a holistic view of health, physical activity as a key to well-being, stress management and a healthy diet. Wellness hotels now regularly make a point of including such themes in their offers, and burnout prevention packages are frequently being marketed by hotels in search of new market niches. Not all such offers include professional help, however, which raise questions about how sustainable the improvement they promise will be for the guest. Here is an area that needs attending to in the future. Fortunately, the awareness of this need is going.

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The increasing competition in the wellness industry makes it challenging for businesses to survive. Among wellness hotels, in the 4-star category the competition is particularly intense. Customer expectations regarding quality and breadth of services have grown, which has led hotels to invest in increasingly opulent wellness “oases”, many of which will hardly pay for themselves. In the near future this may well lead to a consolidation within the industry. A key to survival will be the quality of personnel, and here the fact that Austria is a global leader in tourism education certainly provides a competitive advantage.

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Because of the historical development of the term wellness in Austria, it continues to be associated especially with what thermal spas have on offer—with thermal water, massages, various health and beauty treatments.

Well-being, on the other hand, has a wider, more holistic meaning and is associated with work-life balance (facilitated by the large number of holidays and vacation days in Austria), good, healthy food, physical health generally, as well as the conditions that permit one to maintain it, a secure environment—both in terms of a low crime rate and low rates of pollution, a broad social net—in short a high quality of life.

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