

EUROPE: *Germany*

WELLNESS-HISTORY

Germany – as the home of Balneotherapy has been an ever popular spa destination. The approach of the German spa and wellness history was a very different one to what we nowadays expect. Holistic approach, medical therapies, Balneotherapy, and long term stays were combined to form the typical German health cures.

Health cures were and still are mainly located at areas with certified Kur Locations, which are based upon the subject's medical as well as therapeutically maintenance. The centres and the doctors need to have, aside from a medical certification, in depth knowledge about regional natural health therapies and knowledge on local remedies (such as mud, thermal water, bath cures, etc.) All therapists need to be highly specialised. The infrastructure on the cure cities is totally focused on the spa and wellness guests and offers physical and mental health programming.

Famous therapies find root in Germany:

- ◇ Balneotherapy
- ◇ Hydrotherapy
- ◇ Detox cures
- ◇ Etc.

The most famous names within the spa and wellness field from Germany are Sebastian Kneipp (May 17, 1821, Stephansried, Germany – June 17, 1897 in Bad Wörishofen), Leopold Erdmann Emanuel Felke, Vincenz Prießnitz, among others. Kneipp was a Bavarian priest and one of the founders of the Naturopathic medicine movement. He is most commonly associated with the “Kneipp Cure” form of hydrotherapy, a system of healing involving the application of water through various methods, temperatures and pressures. In Norway, he is mostly known for his bread recipe based on whole wheat. Kneipbrød (Kneipp Bread) is the most commonly eaten bread in Norway.

Although most commonly associated with one area of Naturopathic medicine, Kneipp was the proponent of an entire system of healing, which rested on five main tenets:

- ◇ Hydrotherapy
- ◇ Herbalism – the use of botanical medicines
- ◇ Exercise
- ◇ Nutrition - a wholesome diet of whole grains, fruits and vegetables with limited meat
- ◇ Spirituality - Kneipp believed that a healthy mind begot a healthy person



SPA INDUSTRY BRIEFING: *Germany*

During his time in Bad Wörishofen, Kneipp was able to counsel many people. Tens of thousands came from all over the world to receive his healing advice. He was the author of the books *My Water Cure*, *Thus Shalt Thou Live*, and *My Will*.

GERMANY'S SPA INDUSTRY TODAY

Today Germany has two main streams within the spa industry:

Public facilities:

Based on the richness of thermal water sources a lot of public thermal bathes can be found in Germany. Public Thermal Baths are mainly operated by the local community. Entrance prices are kept low to make access available for the whole population. They are modern forms of the historic Roman bath houses. Most of these Public Thermal Baths offer a tremendous space with huge sauna areas, several water basins, family areas, restaurants, gyms and an ongoing growing treatment area. The newer and renovated facilities have the atmosphere of a 4-star hotel spa.

Private facilities:

As everywhere, in Germany you'll hardly find a leisure hotel without a spa area. Comparable with Austria and Switzerland, the average size of the spa's are between 1,000 and 1,800 sqm, depending on the number of hotel rooms. The spa is a basic request of clients within the 4-star and 5-star hotel segment. Pressure on 3-star hotels is increasing and most of them offer at least a pool and sauna area and one or two treatment rooms. Day spas are still uncommon, but are slowly growing in numbers. They are either developed from the status of a health-centre or a larger cosmetic institute, and are mainly located in larger cities.

Major challenges for the spa industry are:

- ◇ investment costs and return on invest
- ◇ missing professionalism
- ◇ missing Spa knowledge on the hotelier side
- ◇ possibility to get professional knowledge on spas
- ◇ ability to create a economically successful spa
- ◇ staff

Major mistakes:

- ◇ they build spa sqm instead of spa contents
- ◇ spa concepts are reduced on architectural solutions
- ◇ no business and roi calculation
- ◇ no operational concept
- ◇ quality management is missing
- ◇ very reduced reporting and controlling

CHANGES IN THE SPA & WELLNESS MARKET

5-star hotels are much more effected by the economic situation than 4-star hotels.

The main effects are:

- ◇ Reduction on top consumption such as specific wines, the third or forth treatment, etc.
- ◇ sales: guests are choosing middle price level products
- ◇ more energy investment in convincing clients
- ◇ to gain the same amount of turn over, a higher quality of marketing and sales activities is required
- ◇ shorter booking period
- ◇ less advance booking
- ◇ higher time volume on consultation
- ◇ shorter stay at 5-star hotels
- ◇ guests are more demanding, expect more added value and customized service

The less average the hotel, spa, spa menu and services, the more untouched they are from the economical situation.

CURRENT SPA AND WELLNESS RELATED PROJECTS

Larger investments are shifted, concept phases are longer (what, why, where, for how much). I would estimate that at least 30% of projects in pipeline are shifted but not canceled.

Current spas, among the most famous, in Germany are:

- ◇ Wald- & Schlosshotel Friedrichsruhe, www.friedrichsruhe.de
 - ◇ Schloss Elmau Luxury Spa & Cultural Hidaway, www.schloss-elmau.de
 - ◇ Resort & Spa zur Bleiche, www.hotel-zur-bleich.com
 - ◇ Gesundheitshaus Meersinn, www.meersinn.de
 - ◇ Hotel Budersand Golf & Spa, www.budersand.de
 - ◇ And many 4* Resorts with spa's
-

ADAPTING TO THE CURRENT ECONOMIC CRISIS

Owners and operators concentrate much more on the guests, to keep them, increase them, not to loose them. Therefore guests seriously influence sales and marketing activities and quality management. This is felt through the high volume of requests for in-house training activities and seminar bookings.

SPA INDUSTRY BRIEFING: *Germany*

Many spas try to get a clearer concept, with a high priority on health orientation, not necessarily into the medical spa direction but much more oriented towards the traditional roots of the German natural health knowledge such as Hildegard von Bingen, Sebastian Kneipp, etc.

OPPORTUNITIES

The current situation offers a tremendous pressure but also opportunity to work on the concept and quality side of any hotel and spa product. What do we offer to whom? Why do we want to offer this? What is our core competence and how can we strengthen it? What are the USPs? Not the ones written in the sales papers, the ones we fulfill with life? What is the added value for our guests? Why should high qualified staff work with us? Why are we attractive for them and what do we offer our team? How do we communicate to whom? What is our message?

A crisis is time for self reflection and self analyze, for renewal processes and this sometimes hurts.

SUBMITTED BY:

Dagmar Rizzato

CEO

Rizzato Spa Consulting

+49.7542.94699.0

info@spa-consulting.com

www.spa-consulting.com

