



EUROPE: *Germany*

ECONOMIC CLIMATE

The financial crisis had an impact on bookings in regards to wellness vacations. The number of wellness holidays declined from 5.2 million in 2008 to 4.5 million in 2009.¹ This decline is partly due to the fact that more distant destinations are not as popular anymore as they used to be: Germans stayed in their own country by reason of financial considerations, travel security and environmental issues. Consequently, this decline had no effect on the turnover of the German Wellness Industry, as wellness travel within Germany increased by 4,7 %.¹

The financial crisis also created a gap between high affluent travelers and people with average income. Whereas people with lower income travelled less than before, people with higher income travelled more despite the financial crisis. However, they were more price sensitive and spent less money than before.² The winner of this situation were the 4 and 5 star wellness hotels in Germany reporting a double digit growth in 2009.¹

The interest in wellness and health has been continuous in 2009. Even so Germany has an efficient health insurance system, 86% of Germans were willing to spend extra private money for health, even in struggling times.³

STATISTICS

14 % of Germans pursued wellness activities in 2009⁴, and they spent 73 billion Euros. The forecast for 2010 is that they will spend 100 billion Euros.⁵ For half of the German population wellness is an important factor in their lives.¹

Wellness vacations are one of the favorite forms of vacation for Germans. Every third German household is considering a wellness vacations (11.5 million). 5.6 million households have already done a wellness vacation.¹ For 29 % of Germans, health is an important factor for choosing their holiday destination. For 31% it is important and only 7% say they don't consider it at all.²

Three out of four wellness vacations take place within Germany. In the last five years wellness vacations within Germany have continually increased with an average of 10% spending more than 1 billion Euro in 2009.¹ The spending for wellness vacations abroad has also increased in the last five years by an average of 10.5%. Top destinations for wellness vacations abroad are Austria and Northern Italy.¹ The preferred time for wellness retreats are prolonged weekends. The average duration of a wellness vacation is 2.6 days.⁶

Who is booking Spa Vacations? Every fourth wellness vacationer may be described as “proactive health conscious”: people with life experience, who are quality conscious (often over 50 years of



SPA INDUSTRY BRIEFING: *Germany*

age). They do not only want to be pampered but want to use this opportunity to recharge and learn about health. They want treatments and activities for body, mind and soul. “Stressed performers” between 35 and 49 years old are the largest group of wellness vacationers (30%). They seek relaxation and recovery and are very interested in beauty related treatments. In this group the financial crisis shows an effect as their spending for wellness vacations declined by 12%. “Families” at 24% are the new emerging group for wellness vacations. They like to be active together and seek this vacation as a balance to their everyday life. Their spending for wellness vacations increased by 7% in 2009, in spite of the financial crisis.

Booking behavior: travel agency: 44%, hotel direct: 21%, tour operator direct: 13%, Internet: 12%.¹

INNOVATION

Prevention: 50% of Germans are overweight, 40% do not do any exercise, 20% smoke. In summary 30% live an unhealthy lifestyle. 94% are open to preventative measures. 86% are willing to spend extra private money (besides their health insurance) for health improvement and have done so despite the crisis.³ Together with the fact that 1/3 of Germans consider wellness vacations, wellness and health vacations as a preventive measure, there is enormous potential for growth in Germany.

Longing for a deeper meaning of life: Germans have been and still are, the world champions in vacationing in regards to time and spending. As travelers Germans are looking for a deeper meaning and quality in life, values that help them cope with the uncertainty of our times. For them holiday is a time to rest and find a new balance through experiences that give them new values. Nature, religious pilgrimages, art and culture are very popular. This explains the great interest in wellness, as a holistic approach to wellness allows for experiencing a new meaning of life and how to implement that in everyday life.⁷

Design

Nature and natural materials in a modern, contemporary setting, which also appeals to a very young audience, are the design of successful spas. Latest trends in furniture design include furniture made out of paper that appeals to the young generation who go for natural and ecological materials. They are often presented in modern and often astonishing forms that are close to art. This focus on nature also includes a sophisticated fusion of the outside/inside allowing nature to play an important role in the design of rooms.⁸

Offerings

Everything that addresses the energetic level of a human being, from diagnostic systems that are based on energy checks to treatments that work with energy to energy healing systems. Energy diagnosis and healing are fast and correspond to our fast paced times. They are perfect for the Wellbeing Industry as they allow a holistic diagnosis, as well as wellbeing and health improvements in a short period of time.⁸

What have you done to innovate your own business recently.

With the huge growth of the spa industry, quality has become one of the main factors for success. We have worked on the quality aspect of our criteria for holistic health resorts and hotels as well as the quality of our partner hotels. With the movement of the spa industry towards holistic health, education of the consumer has become paramount. In the last year we have given talks and seminars about holistic health and quality for the press, travel trade and consumers worldwide.

Footnotes:

- 1 Wellness Sensor 2010
- 2 Forschungsgemeinschaft Urlaub und Reisen FUR
- 3 Roland Berger Strategy Consultants 2009
- 4 Hamburg.business-online.de
- 5 Global Insight
- 6 Gesellschaft für Konsumverhalten GfK
- 7 Expedia Travel Trendwatch 2009
- 8 Thanks to the input of Andreas Wieser (Lanserhof)

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