



## EUROPE: *Germany*

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### GOOD LUCK IN THE CRISIS

The financial and economic crisis has influenced spa & wellness travelers in and out of Germany. According to the “Wellness Sensor 2010” published by GfK (Society for Consumer Research) and the German Wellness Association, the number of trips to spa and wellness destinations has dropped from 5.4 millions in 2008 to 4.5 millions in 2009. The GfK Group is Germany’s largest market research institute, and the fourth largest market research organization in the world. The “Wellness Sensor” is performed on an annual basis in 20,000 households.

Good news for upscale 4 and 5-Star spa- and wellness resorts: They did not suffer from the crisis but rather increased their business – up to four per cent in 4-star properties and up to an amazing twelve per cent in the 5-Star category. The total spending for wellness-based travel went up by 4.7 per cent, which is more than 100 million Euro!

New spa and wellness seekers are families which have increased their spending by 7 per cent. Obviously, they are younger people who have adapted to wellness before and are not willing to neglect this as parents. Regarding destinations, in 2009 Germany was the favorite place to spend wellness vacations. Competition is coming from the cruise ship market where the market share of total trips taken by Germans jumped up to 15 per cent, compared to a market share for spa and wellness travel of 19 per cent.

### GREEN SPA

The consciousness for environment and sustainability has arrived in German Spas – still very reluctant but on the rise. This development has been confirmed at the BEAUTY Trade Show in March 2010, where a complete show area directed by the German Wellness Association displayed interesting “Green” techniques and attributes. Whilst efforts of energy saving are not really new, architects and spa operators are starting to focus more on the right choice of floor-coverings, wall paper, “healthy” wall paint and light systems. New environment-friendly products like towels or staff clothing are requested. Natural and organic skin care products are getting a larger fan group than it used to be a couple of years ago. Shall we guess when a Green Spa is no more “Nice to have” but “Must-have”?

### TRENDS TO WATCH

The number of serious spa and wellness hotels in Germany can be estimated at 600 properties. They have to compete in a fast growing market in Europe. Therefore, after a flood of Buddhas, Lomi-Lomi and oriental kitsch in hotel spas, the actual trend now is absolutely “Go local”. Regional “USP’s” can easily be communicated and go along with the increasing demand on domestic “spa” travel. For example, a hotel owner in the Black Forrest harvests spruce-tips every spring to pro-

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duce their own aroma oil or skin care products. Guests have a choice between bath, massage or peeling. Along with the treatment, a cup of spruce tea is served. But the smell and taste of spruce is not only limited to the spa. Healthy spruce honey is served for breakfast or in the ice parfait for dinner.

A quite different program is offered in the northern part of Germany on the coastline of the Baltic Sea on the island of Usedom with an offering called “MEERness”. The philosophy behind this play on words is to bring the sea into the hotel, the spa and the restaurant. Marine algae are used in treatments as well as in the kitchen, and special reading material is to be found in the library. “Back to the roots” in Germany is resulting in going back to old traditions of therapy, Balneotherapy and Hydrotherapy or Kneipp cures.

The move from just pampering to a holistic wellness understanding is worth watching in Germany – as an alternative to doctors, drugs and diseases, as wellness-pioneer Don Ardell expressed 33 years ago. What he called “REAL” Wellness is a concept to promote healthier, more enjoyable lifestyles. The option is not “Yes we can” but: “We will do something for ourselves, now or never!” Don Ardell will be guest of honor in August, when the German Wellness Association (Deutscher Wellness Verband) will be celebrating its 20th anniversary. This relatively short term of twenty years makes me notice how fast our industry has been growing in our country and all over Europe.

Building bigger and bigger is not always better and does not always mean to make big money. The importance of spa to be a profit center is not shared by everyone. It is one thing to promote a wellness philosophy and to attract a reasonable number of clients. It is something else to run a spa well and profitably – that’s a completely other story. Talking about economic viability, there is no compromising. There is still a gap of knowledge between how to run the business of spas with accurate and detailed figures. No problem in F&B Departments: everybody can tell you about food costs. No question either, when asking hotel managers about occupancy or Average Room Rate (ARR). But already when you inquire about RevPAR, some begin to stammer. Regretfully there are no reliable spa benchmarks in Germany yet. There is a strong need to catch up with other countries, but most properties are reluctant to provide confidential figures.

## CONCLUSION

The crisis has not hit the spa & wellness hotels in Germany as hard as expected. Those who have invested not only in hardware and square meters, but in quality over the years have been rewarded. Quality of service, quality of staff, and quality of treatments have added value for the guest.

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