

Wellness Trends 2015

Wellness has been embraced by the mainstream. New gadgets and apps have boosted the market. Digital Detox and Social Wellness are all the rage. Strong revenue growth and a willingness to invest in spa and wellness hotels mean that the wellness industry is ready for another positive year. These are the headline Wellness Trends for 2015. They are based on a survey of guests and hoteliers carried out by the spa and wellness travel operator beauty24 together with the hotel-cooperation Wellness-Hotels & Resorts. For the tenth year in succession, the report on developments and trends in the spa and wellness travel industry is being presented at the ITB in Berlin.

Continued growth in the spa and wellness industry

Berlin, 4th March 2015. The market forecasts made in the Wellness Trends 2014 were accurate: it was another positive year for the spa and wellness industry. In the latest survey of hoteliers more than 56 percent say that their revenues have grown. More than 13 percent go as far as to describe a sharp rise in revenues. Around 65 percent expect this growth to continue during 2015. This positive development is leading hoteliers to increase their levels of investment: in 2014 almost 81 percent invested, this year 89 percent are planning investments. *As Michael Altewischer, CEO of Wellness-Hotels & Resorts explains, "We see that in this sixth year since the sales tax for accommodation services was reduced, hoteliers continue to make use of the extra cash flow for investment purposes, in order to keep up with their international competitors. And, by the way, this does not just include construction and renovation projects, but also investments in the training and qualifications of their staff."* The needs and wishes of guests have also changed: wellness has been embraced by the mainstream. Those thinking of a short break nowadays are more likely than ever to think of a spa and wellness holiday. And the reasons for wanting a spa break have changed: health and beauty are less a part of the equation and free time and relaxation have gained in importance. "Quality time" has become a key expression: more and more holidaymakers want to use their wellness holiday to spend time with their partner and family. Taking a time out from everyday life has become a top priority. *"A spa holiday has become an interesting proposition for a variety of target groups. Guests no longer place overriding importance on beauty treatments and preventative healthcare. They are now looking for a real break from daily life - something special, something they have earned and can reward themselves with,"* explains Roland Fricke, CEO of beauty24.

What does 2015 have in store for the spa and wellness sector? Which services will clinch bookings? And how are hoteliers equipping themselves to deliver these services? These are the questions answered in the Wellness-Hotels & Resorts and beauty24 Wellness Trends 2015 study.

1. Service: The cherry on the cake

Good service is crucial – especially given guests' higher expectations of spa hotels: more than 97 percent of spa guests say that the quality of service on offer is the key to their wellbeing (67.51 percent say this is very important and 29.93 percent say this is important). Nine out of ten guests want to feel continuously pampered and almost all of those surveyed (98.77 percent) want attentive, but not intrusive, hotel staff. But which guest services should never fail and which are optional?

Service begins with the booking

Good service should begin before a guest even arrives at the hotel: almost 70 percent of wellness guests expect an uncomplicated online booking procedure. This includes a speedy booking confirmation via email

(54.87 percent), up-to-date website information on room availability (52.71 percent) and suggested alternative dates should a guest's first choice dates not be available (53.64 percent). *"Wellness starts with the booking. This is when you see who the real professionals are," explains Roland Fricke in relation to the booking preferences of wellness guests.* Looking at the responses from hoteliers in relation to booking procedures, it becomes clear that there is much room for hotels' websites to be improved. The methods for displaying current room availability online certainly leave something to be desired - almost 43 percent of the hoteliers do not yet have this functionality. In addition, around 20 percent of the hoteliers are yet to offer their guests the option of booking online. Rapid confirmation of bookings via email (95.03 percent) and the suggestion of alternative dates (96.26 percent) have become elements of standard hotel service. *"More and more small and medium-sized hotels understand just how important online sales via their own website are. But if they don't listen to their guests in relation to transparency and simplicity, the field will be left wide open for the major online portals. However, due to their complexity, it is nearly impossible to present wellness services in their entirety online. The personal consultation - either at the spa or by telephone - will therefore always play an important role," said Altewischer.*

Service: Desire and reality

More than 85 percent of the guests state that bathrobes, slippers and sauna towels should come with the room: 36.69 percent say this is important and 48.74 percent say this is very important - with more than 90 percent saying that this service should be provided at no extra cost. In contrast, around 14 percent of the hoteliers still charge guests for this service. Free drinks (tea and water) during their spa stay are important for almost 80 percent of guests (important for 43.98 percent, very important for 35.06 percent) - with nine out of every ten guests expecting this service to be provided at no extra cost. Approximately 15 percent of the hoteliers see this as an extra service for which guests should be charged and around six percent of the hoteliers fail to offer any drinks in their spa facilities. Guests classified a number of services that they expect at no extra cost as either important or very important: a range of payment options, an initial consultation at the spa, a parking space, transfers to the hotel for guests arriving by bus, train or plane, wireless internet, breakfast served until midday, late checkout and a daily bottle of water and fruit selection in their room. The reality in the spa and wellness hotels is somewhat different: there is no chance of combining a lie-in with a late breakfast in two thirds of hotels. A late checkout is often possible, but around 65 percent of the hotels charge their guests for the privilege, a bottle of water and selection of fruit is not part of the normal service at around a third of the hotels and roughly 43 percent of the hotels charge for providing this service. Around 29 percent of the hotels do not offer transfers to and from their hotel for guests not travelling by car, and almost 45 percent of the hotels bill their guests for this service. Roughly ten percent of the hotels are still unable to offer their guests wireless Internet access. *"Those who want to impress have to offer their guests something. Our study shows that guests don't have unrealistic expectations of a hotel's services. But they want something more than bog standard service. It is the small details that are the most important," explains Roland Fricke. "Hardware is one thing, a good service level is even more important. Our study this year couldn't illustrate this more clearly," adds Altewischer.*

2. Self design vs. digital detox

New technology opens new target markets

The latest wearables from companies such as Apple and Jawbone - along with a multitude of apps designed to track fitness activity and monitor physical condition - are gaining acceptance amongst consumers. These technologies and gadgets appeal most to young men. To what extent can the spa and wellness sector exploit this trend how will guests' expectations change? Almost 20 percent of wellness guests are already making use of these technical possibilities and, amongst men under the age of thirty, the figure stands at 33 percent. 14 percent of these wellness guests currently think that it is either important or very important that spa and wellness hotels should have the technical capabilities to evaluate the results provided by such

equipment and around 25 percent want their wellness programs to be personally adjusted on the basis of these results. Approximately 19 percent of the guests think that self-optimization workshops are also either important or very important. A further 14 percent are interested in receiving coaching via smartphone app after their stay at the hotel. *"Technology has become an ever more integrated element of our daily lives. More and more of the things we take everywhere with us are connected - e.g. watches and bracelets - and this will open up new potential markets for the wellness sector," says Roland Frinke from beauty24.* Progressive spa and wellness hoteliers have already recognized the potential of these new technical possibilities: Anyhow ten percent already offer to collect and analyze their guests' digital data. Further approximately seven percent are planning to offer such services in the near future.

Conscious rejection

While many turn to technical devices to make their lives easier, there are others who consciously reject what they view as encroaching digital connectivity: a quarter of the wellness guests would make use of Digital Detox holidays. Half of these guests would use such an opportunity to focus more on themselves and their partner and roughly 71 percent simply want to enjoy a relaxing weekend before the digitalized working week starts again on Monday morning. So far just eight percent of the hoteliers offer their guests the chance to withdraw fully from the connected world. A further seven percent are planning to introduce such offers. *"More and more people realize that being constantly available via digital technologies isn't doing them any good. Nevertheless, they find it difficult to be parted from their smartphones for more than a few minutes. Spa and wellness programs can help them to switch off their devices and switch on their senses," comments Altwischer.*

3. Sleeping better

Spa and wellness holidays are becoming ever more a break from every day life, with the hotel a space where guests can switch into recovery mode. The most relaxing time out for guests is the time they spend sleeping. The optimal environment and room furnishings serve to create the ideal wellness atmosphere. It may well be too much of a hassle at home, but when they are on a wellness break, half of all guests expect the luxury of a daily change of bed linen. The top five factors mentioned by wellness guests in relation to a good night's sleep are based on those rated as either important or very important: peace and quiet during the night (91.3 percent), a superior mattress (90.37 percent), individually regulated room temperatures (82.93 percent), windows that can be darkened (72.38 percent) and luxury bed linen (58.11 percent). More than half of all the guests (54.31 percent) also think that a "pillow menu" - a selection of different pillows - and a radiation-free bedroom (55.65 percent) are either important or very important. *"Having a good bed during a wellness holiday is more important to the guest than the comfort of the loungers: Spa guests have made it clear that they have high expectations in this regard - the quality of their sleep is important for the overall quality of their spa holiday," said Roland Fricke from beauty24.*

The hardware offered by hotels in relation to sleep quality is already at a high level. Guests' expectations and the reality in spa and wellness hotels are not too far apart. *"The perfect bedroom environment certainly helps guests to get a good night's sleep, but the seeds also need to be sown during the day," said Altwischer.* Which is why over 40 percent of the spa and wellness hoteliers offer exercise and nutrition programs designed to maximize sleep quality. Approximately 12 percent of the hoteliers use special scents, along with relaxation CDs and audio books, to ensure that their guests benefit from a restful sleep. Further more than 10 percent are already planning such services. The importance of sleep to wellness guests is illustrated by the fact that around seven percent of the hoteliers already offer personalized sleep coaching and a further seven percent plan to add this to their programs.

4. Social Wellness

Spa and wellness holidays are of interest to a growing number of people: it started with women; then it was couples; then came men and groups of friends; and for the last couple of years more and more families have joined in. Now an increasing number of singles are taking wellness holidays. The proportion of guests taking a wellness break on their own has now reached ten percent. Five years ago the figure stood at eight percent. The social needs of each group vary significantly. Couples often say that they want to spend quality time with their partner. The proportion of guests expressing this wish has increased constantly over the last few years: in 2011 the figure stood at 33.19 percent, increasing to 43.90 percent today. The importance of quality time during a wellness holiday is clearly illustrated by the following: around 60 percent of the wellness guests agree that their spa holiday is the perfect opportunity to spend more time with their partner, family or friends. Singles and guests travelling alone have quite different priorities: 26.43 percent are hoping to meet new people. Guests in the 60plus age range accompanied by their partner (16.29 percent) or friends (21.13 percent) admit that they are also interested in making new friends. Guests looking to use their time in a spa hotel to meet like-minded people need different facilities: every eighth would like larger, shared tables in the hotel's restaurant (12.79 percent). 52.53 percent are interested in lounge rooms in the spa - shared areas in which conversation is allowed - and 42.47 percent would like to see more offers for single guests. These needs naturally stand in contrast to the needs of those who view a spa vacation as a personal retreat - a considerable proportion at one in three (30.86 percent). Hoteliers are pretty much walking a tightrope as they try to find a middle ground. *"More and more people are living on their own, which is why social dimensions are playing a more central role in the wellness sector. But this doesn't mean that spa and wellness hotels will soon be abolishing quiet rooms. It is more about finding the ideal blend in order to offer both communicative spaces and places for retreat,"* observes Michael Altewischer from Wellness-Hotels & Resorts. *"This is where the battleground between spa hotels now lies. It is no longer the spa and wellness program or the chic, modern pool that are decisive, rather it is the right blend of service and social activities that clinch bookings. Only hoteliers who are able to communicate effectively with their guests will continue to operate successfully,"* is the assessment of Roland Fricke from beauty24.

Details on the surveys

The online surveys were conducted in January 2015. 107 beauty24 and Wellness-Hotels & Resorts partner hotels took part in the hotelier survey and 2,690 wellness-savvy guests participated in the guest survey.

About beauty24 – wellness trips online with the Trusted Shops seal of approval

beauty24 is one of the biggest organizers and agents for exclusive and high-quality beauty- and wellness trips in Germany with a worldwide wellness travel offer including 8,000 well-being programmes in over 650 hotels, day spas and hot springs. A booking over beauty24.de is user-friendly, transparent and simple. Since 2014 beauty24 has been certified with the Trusted Shops seal of approval as a secure online shop. The wellness offers of beauty24 are available online, over the beauty24 wellness counselors and over our cooperation partners like vente-privee, limango, Amazon, Plus-Reisen and Amway. The wellness counselors are available for their customers from 9am–7pm at a free wellness travel hotline 0800/2400044 or by e-mail at service@beauty24.de. The company was founded in 2000.

About Wellness-Hotels & Resorts

The Wellness-Hotels & Resorts (www.wellnesshotels-resorts.com) cooperation is the number one choice for holiday-makers when searching for 'wellness in a hotel' and has been at the top of the German speaking wellness hotel industry since 1997. Since the original pioneers joined, carefully selected and mostly owner-operated German wellness hotels, as well as international partners in the 4 and 5 star sectors, are part of the cooperation. Independent tourism experts check the member hotels prior to entry and then at regular intervals in all areas. The Wellness-Hotels & Resorts' quality seal is awarded by TÜV Rheinland and is the most comprehensive audit carried out within the wellness industry. In their October 2013 issue, the German consumer test magazine "Stiftung Warentest" has again awarded the cooperation's "wellness tree" quality seal to be one of only a few helpful seals within the wellness market. The latest brochure can be ordered online at www.wellnesshotels-resorts.com or by telephone on +49 (0)211 679 69 69.

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