

Wellness Trends 2012

- New trends and tendencies based on TravelScope and a guest study about wellness travel have been carried out for the first time by the market research company GfK on behalf of Wellness-Hotels & Resorts and beauty24
- New developments for wellness hotels based on a hotel survey of partner hotels carried out by beauty24 and Wellness-Hotels & Resorts

Wellness branch continues its upward trend

Berlin, 7 March 2012. The growth continues uninterrupted: The wellness branch looks back at a successful 2011. This is confirmed by a current hotel survey of partner hoteliers, carried out by the wellness travel agency beauty24 and Wellness-Hotels & Resorts. In 2011, 60.17 percent of wellness hoteliers noted an increased demand for wellness services and the hoteliers are looking optimistically into the future. For 2012, 65.85 percent expect even more demand. Not only the wellness hoteliers can confirm these numbers. The analysis of the travel market in the GfK TravelScope, a long-term study of the market research company GfK, also shows: Wellness holidays are becoming more attractive – in comparison to 2010, the share of wellness travel increased by 6.7 percent. In contrast, the entire travel market noted a growth of only 2.1 percent. Why is the wellness branch doing so well? The travel market is increasingly shifting to short-term stays, domestic destinations are in demand as never before. Result: People travel more often, but rather for shorter trips.

The branch is making immense investments so that this growth will continue. The hotelier survey shows that in 2011 more than three-quarters (81.3 percent) of every wellness hotelier invested money especially for modifying and upgrading their hotel rooms (69 percent). Also in 2012, 82.11 percent are planning on investing in their hotels. This is the obvious effect of the Growth Acceleration Law passed by the federal government in December 2009.

The results of the wellness trends 2012 are based on the hotelier survey of their own partner hotels carried out by Wellness-Hotels & Resorts and beauty24 and, on the other hand, the wellness customers were carefully and closely examined in a mutual guest study by beauty24, Wellness-Hotels & Resorts and the GfK. What does the wellness traveller desire? And how do the hotels react?

The wellness trends for 2012

1. The wellness package: compact and affordable

The wellness market is growing. The growth in revenue is not necessarily the result of guests spending more per trips, rather because they treat themselves more frequently to a wellness holiday. The guest takes a very close look at the costs and prefers to book the more affordable offer. Price awareness and cost certainty – which has proven to work well for package tours – are now also factors in the wellness branch. Today's wellness customer expects already before the trip begins a transparent price package including all costs, unexpected extra costs incurred at the location do not fit into the budget. This was also confirmed by the guest study. Thus, half (50.2 percent) of wellness guests prefer to book their wellness travels as a package deal with a minimum of a one-night stay including a wellness treatment and service. The hospitality industry has recognized this trend and increasingly offers price-sensitive beginners price packages for their guests. More than half (57.72 percent) of those hoteliers, asked in the survey, said the same. Guests are especially keen on a stay with use of the wellness area, including wellness treatment (66.20 percent). 63.38 percent of the hoteliers stated that many bookings also included half-board as part

of the package, which helped the guest have an easier overview of the costs incurred during the wellness trip. According to the hotelier survey, 60.57 percent of guests opted for the accommodation-only rate including use of the wellness area. “Guests do not want to be deceived by hidden costs. beauty24 had already noticed this trend years ago and offers complete wellness arrangements. The sense of wellness begins as soon as the guest starts booking,” according to Roland Fricke, head of beauty24. The GfK study shows that of additional services booked on location, especially sporting activities are becoming even more popular. An increase of 25.5 percent over last year is to be noted here. The attractive prices also appeals to target groups, who might not have considered going on a wellness holiday. Moreover, the target market is becoming younger. In 2011 one in four people (25.9 percent) up to 34-years-old went on a wellness trip, which corresponds to an increase of almost 10 percent (9.9 percent) in comparison to the previous year.

2. New target groups: Families discover wellness

There is yet another reason for the growth seen in the wellness branch: New target groups are booking wellness holidays. The most profitable clientele are still couples, which make up 53 percent of market share, but there is movement in the market: “More and more parents are travelling with their children to wellness destinations. In 2011 the share of families grew by 18.8 percent, compared to 2010,” says Daniela Briceno-Schiesser, Marketing Consultant of GfK. The partner hoteliers of beauty24 and Wellness-Hotels & Resorts that participated in the hotelier survey can also confirm the trend for families seeking a wellness vacation: 16.26 percent have seen an increased demand for offers that cater to parents with children. Parents themselves are looking for a wellness holiday with added value that cannot be found at the pony farm or in a hotel that caters to children. They are looking for a soothing back massage or a visit at the haman. A time-out for themselves while enjoying time together with their families – that is what attracts parents to a short holiday in a wellness hotel. The initiators of the study agree: This target group has great potential for the future of the branch, although this also brings new challenges for the hoteliers, because, especially in the wellness hotel branch, the most diverse interests come together. “A romantic dinner with – in the worst case – screaming children at the neighbouring table is hardly conceivable. That’s why many guests wish for clear rules when it comes to children in a wellness hotel. There is no point in having hotel guests with diverse needs clashing”, explains Roland Fricke. The guest study released by beauty24, Wellness-Hotels & Resorts and the GfK took the opportunity to listen carefully and discovered that 50 percent of guests are not bothered, in principle, by the presence of children in a wellness hotel, although 45.1 percent of wellness guests were for an adult-only pool times and keeping children away from the spa area. Michael Altewischer, head of Wellness-Hotels & Resorts: “As a hotelier, it is important to take a clear position vis-à-vis the guest: Yes, we offer, or no, we don’t offer wellness holidays for the family. If families are desired, then the employees in the hotel and also the other guests should be informed about the rules and conditions. If necessary, there is also the possibility for guests travelling without children to use the time outside of the school holiday periods.” The hoteliers have already recognized the potential of families. 49.02 percent of those asked in the partner survey carried out by beauty24 and Wellness-Hotels & Resorts offer individual childcare for tomorrow’s guests.

3. Stress prophylaxis: Prevention is better than the cure

Burn-out is a catchword, especially in media headlines, that has recently gained prominence in the business world. The result: a higher consciousness in Germany for emotional exhaustion. Prevention is better than the cure. Increasing numbers of wellness guests are taking time for themselves and listening to their inner voice. Wellness-Hotels & Resorts, beauty24 and the GfK asked the guests about their reasons for

going on a wellness holiday. The longing for recreation and relaxation is well known in the wellness branch as the driving motivation for many guests. This was also the result of the current survey: 84.6 percent would like to recover from the stress of daily life and for more than three-quarters (76.9 percent) there was a clear wish to do something primarily for their health. What is new is that, in the meantime, more than every second person (53.3 percent) wants to prevent burn-out. “Whether this figure can be traced back to the enormous media interest about the topic burn-out from last year, we can only guess”, says Daniela Briceno-Schiesser. Time spent together with the partner is also important for 52.4 percent. At 17.1 percent, maintaining beauty has noticeably dropped. “Here we can see a marked shift. In our previous guest survey carried out mutually with Wellness-Hotels & Resorts, maintaining beauty (21.1 percent) had a much higher priority”, added Roland Fricke. From the wellness hotel branch’s perspective, programmes that call themselves ‘Burn-out Prophylaxis’ are not in demand. This was the result of the hotelier survey. “Burn-out is a case for the clinic and not to be handled as some sort of extra service during a wellness trip. I welcome all programmes that make it possible for the guest to learn about sport and relaxation techniques, that they can then integrate into their daily lives at home”, explains Michael Altewischer. In spite of this, there is a need to do something for their well-being, for relaxation and to leave behind the stress of daily life. This is confirmed by another number from the GfK study: The number of single travellers has increased by 27.1 percent in comparison to 2010 and makes up a 10.3 percent share. “Out of these single travellers, over 30 percent does not come from a one-person household. These wellness travellers are very consciously looking for solitude as a time-out, to take some time to exhale”, says Daniela Briceno-Schiesser.

Every third wellness hotelier (34.96 percent) confirms an increased interest for anti-stress programmes. Targeted courses for stress management are already offered by 27.64 percent of the partner hotels; 12.2 percent plan on expanding their offer. “This is the reason why we are successful with wellness travel: With the heavy load in today’s workplace – who wouldn’t want to press the pause button – to relax and prevent exhaustion“, as Roland Fricke explains the increasing demand. Michael Altewischer adds: “The desire for a stress-free time has been the main motivation as has been reflected for years in our customer surveys. But it should be clear to everybody that a two-day wellness trip, often involving 250 kilometres of travelling distance, is anything but stress-free.”

4. Outdoor wellness: Relaxing in nature

Experience wellness outdoors is the motto of the current trend in the wellness branch. Relaxing in nature is even more effective and intensive. Especially in summertime, the guests do not want to forgo enjoying wellness out of doors. Who wants a massage under artificial light when it is warm and sunny outside? Customers are increasingly keen to ensure that their desired hotel has an outdoor spa area and that treatments are offered outside. According to the latest guest study, every second wellness guest (49.7 percent) wants to have treatments out of doors. Not only fitness courses, hikes or Nordic walking are desired, but also massages and cosmetic treatments. Many hoteliers have recognized this trend and they have responded to these discriminating guests: Almost every third hotelier asked (31.71 percent) offers wellness outdoors, 26.83 percent plan to do so. Of the hotels that already offer outdoor wellness, most hotels (87.18 percent) already offer massages outdoors. 53.85 percent even offer cosmetic treatments. At 35.90 percent, guests can relax while practicing yoga or Pilate’s in the hotel’s own park or beach area. The hoteliers see the potential here. According to the 2011 hotel survey, 11 percent have invested in their wellness facilities especially on the outside grounds of the hotel; 16.83 percent of the hoteliers asked are planning this for 2012. Michael Altewischer explains: “Being outside, in nature, is wellness for the soul. Studies have shown that even five minutes in nature can noticeably reduce the level of stress. This is not

about who has the best hardware, but rather about the intelligent integration of nature into the offer structure.” Roland Fricke explains the trend for outdoor wellness: “Wellness customers are becoming more demanding. Holidays and pure relaxation at the same time, this is what the wellness guest expects. Offers, such as outdoor massages and yoga, are taken for granted on exotic long-distance trips. The feeling of the sun and wind on the skin during a wellness treatment is what is also expected at local wellness hotels.” Daniela Briceno-Schiesser from the GfK confirms this trend: “Half of the those asked wanted wellness treatments in nature. This is especially desired by people who come from cities. There is a definite difference between urban and rural guests.”

Details about the survey

The hotelier survey of 123 partner hotels was carried out by beauty24 and Wellness-Hotels & Resorts from January to February 2012. The guest study about the wellness trend of 2012 was carried by the GfK on the behalf of beauty24 and Wellness-Hotels & Resorts in February 2012. Observations about travel behaviour come from the GfK-TravelScope.

About beauty24.de – Germany’s No. 1 for wellness in web

beauty24 is one of the largest wellness tour operators and intermediates for exclusive and high-quality beauty and wellness holidays in Germany. Under the motto “I live wellness”, customers may choose among 8.000 wellness programmes in over 650 hotels, day spas and thermal baths worldwide. For beauty24 wellness holidays are an essential element of a healthy life style. Therefore the company campaigns for a healthy and sustainable life with its offer for years. Part of this purpose is above all a strong focus on regional offers. beauty24 wellness holidays may be booked online on www.beauty24.de, TV channels and direct sales. The wellness consultants are available to clients from 9 am to 7 pm over the free wellness hotline 0800/24 000 44 or via e-mail under service@beauty24.de. beauty24 guarantees high customer satisfaction through constant quality management. The company was founded in 2000.

About Wellness-Hotels & Resorts

The hotel cooperation Wellness-Hotels & Resorts (www.w-h-d.de/www.w-h-i.eu) is the number one address for “Health that is fun” and has been at the top of the German-speaking hotel industry since 1997. In the meantime, carefully selected German wellness hotels, usually run by the owners, have joined the first pioneers along with international four- and five-star partners. Independent TÜV experts test the hotels, among others pertaining to spaciousness, innovation and sustainability of the spa area.

About GfK

GfK is one of the world’s biggest market research companies of the world with 150 operating companies in 100 countries. With about 10.000 employees worldwide GfK disposes of a gigantic pool of expertise and experience and delivers the knowledge that enterprises need for their decisions. GfK TravelScope is well established within the tourism market, providing all data on tourists and the corresponding travel- and booking behavior. The source of all information are the consumers, with 20.000 households and approx. 45.000 persons, regularly reporting their holiday travels, beginning with one overnight stay. Numerous travel details, which are combined with socio-demographic information for target group profiles, are available. In parallel to this, the GfK MediaEfficiencyPanel is measuring the TV- and online-behavior of all persons older than 6 years in private households. Together with the data on print media usage we are able to collect the media usage of the consumers in its various aspects. Our market research information system of real and virtual mobility is based on single source data and enables our clients to implement gained insights directly within their media campaigns.

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