

# THE WELLNESS TRAVELLER – GERMANY – 2024

To up participation in wellness holidays, brands can shift to a holistic wellness experience and focus on diverse activities (eg fitness, nutrition, natural remedies) to elevate quality of life.



Silvia Hondt, Research  
Analyst - Travel & Leisure





# The Wellness Traveller - Germany - 2024

## This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on wellness holidays, including changing usage habits and buying intentions
- Participation and interest in wellness holidays and destinations with a focus on consumer loyalty of avid wellness travellers
- Germans' associations with wellness holidays and how brands can leverage a broader scope of wellness to raise participation
- Consumers' motivation to go on a wellness holiday tallying with trends around health, socialising and self-care
- Interest in types of wellness holidays and activities on wellness holidays and how brands can create a holistic wellness experience
- Behaviours towards wellness holidays, with a focus on promising target groups during the ongoing tough economic climate



To up participation in wellness holidays, brands can shift to a holistic wellness experience and focus on diverse activities (eg fitness, nutrition, natural remedies) to elevate quality of life.

## Overview

At **32%**, participation in wellness holidays is rather low, peaking among Gen Z (**51%**) and Younger Millennials (**52%**) as the most avid potential wellness travellers. While only 25% of Gen X have ever been on a wellness holiday, 70% are interested, **encouraging brands to target them.**

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com) | [store@mintel.com](mailto:store@mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



As inflation is falling, wellness holiday brands can **capitalise on well-off Germans' financial upturn**; however, the last two years of rising prices have done significant **damage to some households' finances**. As a result, **22% of Germans** still expect to change/cancel holiday plans due to rising prices, climbing to **33% of those in a struggling financial situation**.

Moreover, **51% of Germans who are struggling financially** associate wellness holidays with **being expensive**, likely deterring them as they think they can't afford those holidays. **51% of them** have not been on a wellness holiday, but would be interested to go. To engage them, **brands can show that wellness is not necessarily expensive**, for instance, by promoting free-of-charge natural remedies.

While spa breaks (**53%**) and beauty/spa treatments (**62%**) are top of mind for potential wellness travellers, brands need to step up their efforts to **leverage a more holistic approach to wellness to raise participation**. For instance, they can **promote a greater variety of activities** such as nutrition or exercising activities.

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

**store.mintel.com | store@intel.com**

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**

# Report Content

## EXECUTIVE SUMMARY

- The five year outlook for wellness holidays

### Market context

- The economic situation continues to impact spending on holidays
- Mintel's approach towards wellness holidays
- Germans need help to adopt healthy habits in times of crisis

### Opportunities

- Foster a more holistic approach to wellness
- Offer mental wellbeing support in times of crisis
- Be more inclusive across financial situations
- Find a balance between targeting experienced wellness travellers and first-timers

## MARKET DRIVERS

### The German economy

- 2024 is expected to be more challenging than initially predicted
  - Graph 1: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
  - Graph 2: financial confidence index, 2022-24

### The impact of the economy on the wellness holiday market

- Continue to offer flexible solutions around the topic of price
- Wellness holiday brands can benefit with upgrades
- Consumers with less healthy finances need to continue to make cuts to holidays

### Defining wellness

- Wellness describes a lifelong process emphasising quality of life...
- ...based on four areas
- Mintel's approach towards health and wellbeing
- Wellness holidays – more than weekend spa getaways
- Thailand as a source of inspiration for wellness holiday brands

## Health status

- Germans' health status is worsening...
- ...and consumers struggle to adopt healthy habits

## Wellness everywhere

- Wellness in everyday products
- Evolving health tech

## WHAT CONSUMERS WANT AND WHY

### Participation and interest in wellness holidays

- Raise participation with a broad range of wellness holidays...
- ...to capitalise on the interest in wellness holidays
- Push consumer loyalty of Gen Z and Younger Millennials
- Help mothers to participate in wellness holidays

### Wellness holiday destinations

- Domestic holidays and wellness are the perfect match
  - Graph 3: future wellness holiday destinations, 2023
- Domestic destinations: promote more holistic wellness experiences...
- ...and convince Gen Z with sustainability aspects

### Definition of a wellness holiday

- Take relaxation to the next level
  - Graph 4: words/phrases associated with wellness holidays, 2023
- Help travellers to unwind...
- ...and explore different approaches to facilitate relaxation
  - Graph 5: methods of dealing with stress in the last month, 2022
- Associating wellness holidays with being expensive is a barrier to participation
  - Graph 6: participation and interest in wellness holidays, by words/phrases associated with health/wellness holidays, 2023
- Raise participation among Germans with less healthy finances
  - Graph 7: associating 'expensive' with wellness holidays, by financial situation, 2023
- Embrace Gen Z's definition of wellness holidays...
  - Graph 8: words/phrases associated with wellness holidays, by generation, 2023
- ...with a broader scope of wellness
- Promote the variety of wellness

## Motivation to go on a wellness holiday

- Pick up Mintel's Trends to resonate
  - Graph 9: motivation to go on a wellness holiday, 2023
- Help mothers to find time for themselves
- Foster social experiences...
- ...to push social health as part of wellness
- Support travellers transferring healthy habits to everyday life...
- ...and put your experts in the spotlight

## Interest in types of wellness holidays and wellness activities

- Potential wellness travellers are seeking relaxation...
- ...and brands can show them how to improve wellness more holistically
  - Graph 10: interest in activities on a wellness holiday, 2023
- Tap into mindfulness exercise
- Promote a broad image of wellness to Gen X...
- ...with offers focusing on their mental wellbeing
- Offer the top three activities across different types of wellness holidays
  - Graph 11: interest in activities on a wellness holiday, by interest in types of wellness holidays, 2023
- Retreats: offer a wide range of activities to become income inclusive
- Enhance cruises' sense of luxury

## Behaviours towards wellness holidays

- Create holistic wellness experiences
  - Graph 12: behaviour towards wellness holidays, 2023
- Target working parents with mental health offers in the short term
- Help Gen Z and Younger Millennials to switch off...
- ...and offer aid in using digital products healthily
- Foster specific benefits of healthy eating
- Showcase natural remedies
- Travel agencies: implement wellness throughout the customer journey and find the right focus

## LAUNCH ACTIVITY AND INNOVATION

- Cruise brands are investing in wellness
- Hotel Luisenhöhe launches award-winning wellness hotel concept
- Wellness holiday brands can benefit from wellness initiatives in various industries
- Collaborate with beauty and personal care brands promoting wellness...
- ...and food & drink brands using ingredients that improve wellbeing

## Advertising and marketing activity

- Mein Schiff promotes cruises including wellness
- Emirates positions themselves with more relaxing flights
- Specialist travel agency FIT Reisen focuses on alternative treatments
- Niedersachsen promotes their natural remedies

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- CHAID analysis – methodology
- CHAID analysis
- A note on language

# About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

## What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

## How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com) | [store@mintel.com](mailto:store@mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



### Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

email: [store@mintel.com](mailto:store@mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850