

# 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.



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# 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.**

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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.

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# 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

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