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**GERMANY AS A WELLNESS DESTINATION:
DUTCH TRAVELER PERSPECTIVE**

Master thesis

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This Master thesis has been compiled independently. All works by other authors used while compiling the thesis as well as principles and data from literary and other sources have been referred to.

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INTRODUCTION

This master's thesis could provide important information about Germany's Wellness resources and its markets. It also highlights the wellness market and especially Dutch tourist motivations. This may contribute to better control of the markets, understanding tourist motivation factors and strategic development to enhance tourist satisfaction and competitiveness of the destination.

The thesis research focuses especially on the tourists from the Netherlands, and Germany as a competitive wellness destination because according to German National Tourism Board (2018, p. 29) the Netherlands is the major source market for German tourism. Ayyildiz and Turna (2013) support this, stating that Dutch tourist visit Germany because it is a neighboring country and is convenient to visit. This research looks beyond this fact and explores other factors that encourage tourists, and especially Dutch tourists to visit Germany. As well as examining the general motivations and satisfaction elements, the research also focuses on spa and wellness, as Germany is relatively famous as spa and wellness destination.

According to the above statement the motivation of Dutch tourists to visit Germany is being a neighboring country but Germany is far beyond these aspects to visit, as being a wellness destination the motivations of Dutch tourist may be different to visit Germany rather being a neighboring country.

The aim of the study is analyze Germany's competitiveness as wellness destination and the motivations of Dutch tourist .

On the bases of thesis aim the task undertaken during this research are review and analysis of literature related to tourism destination, destination competitiveness and tourist motivation to travel, preparation and conduction of research, analysis of results and recommendation to the German National Tourism based on the result.

The main research question is whether Germany is a competent wellness destination, as being a major source market Dutch tourist travelling to Germany is motivated by health and wellness resources or any other factors.

The research methods used were both quantitative and qualitative. Quantitative methods was used to collect the primary data in form of questionnaire and content analysis used for analyzing the travel behavior of Dutch traveler.

This paper consists of two parts, the first provides a theoretical overview of health and wellness, tourism destination and motivation of tourist. The second part consist of Germany's health and wellness tourism, German European markets and the research part along with result and discussion.

Although it is relatively small sample of tourists in one region and one hotel, the results of this study will hopefully help to understand better the motivations of tourists to visit Germany and the role of spa and wellness in Germany's tourism. This information could help with marketing the destination to Dutch and other tourists and to understand the factors which can help to create more competitive wellness destination.

1.THEORY OF HEALTH AND WELLNESS TOURISM DESTINATION

1.1. Health and wellness definitions

The term wellness is very often used by general public and health professionals wellness tourism has been significantly affecting human life and understanding of wellness tourism has been exponentially increasing from 2015-2017 with a growth rate of 12.8%. The Wellness industry now represents 5.3% of global economic output. (Global Wellness Institute, n.d.).

Wellness is always associated with Health, according to English Oxford Living Dictionary "health is a state of being free from illness or injury" (Health, n.d.). However, definitions vary and, it cannot be defined only on the bases of disease, illness and injury. "A healthy individual has been described as a well-integrated individual, both as to his or her physical structure and as to his or her physiological and psychological functioning"(Dunn, 1957, p. 225). Dunn had the clear concept of wellness in the early 50s that a healthy individual is not unhealthy if he is not psychologically healthy.

Defining the wellness concept has recently started, but the wellness lifestyle was practiced a long time ago. Wellness concept can be tracked from the ancient time, practiced by the people based on the religion and medical knowledge. Traditional Chinese Medicine includes herbal, acupuncture, hot springs and Chinese medicine practices,(Heung & Kucukusta, 2013, p. 347) and Ayurveda includes use of diet, herbs, spices, minerals, meditation, yoga mental hygiene (Parasuraman, Thing & Dhanaraj, 2014, p. 74). All these ancient traditional practices were not only focused on curing illness but also preventing it. These ancient practices apply holistic perspective

to achieve health and wellbeing. Creating harmony between body spirit and mind with the goal of maintaining balance that prevents illness.

Dunn(1959) pioneered the concept of wellness introducing the holistic state of health involving body, mind and spirit in the context of environment and surrounding. He also stated wellness as an alternative and preventive measure to promote well-being. As there are various ways to understand the concept of health thus the holistic concept of health was first introduced by World Health Organization in 1948, as cited in Dunn (1957) "a state of complete physical, mental and social well-being and not merely the absence of disease and infirmity"(p. 225). Many wellness concepts are centralized in this holistic view. The World Health Organization definition has helped to broaden the concept of well-being and health to develop the concept of wellness. Ardell (as cited in Fair, 2011, p. 3)

wellness is about perspective, about balance and about a big picture. It is a lifestyle and a personalized approach to living your life in a such way that you enjoy maximum freedom, including freedom from illness/disability and premature death to the extent possible, and freedom to experiences life, liberty and pursuit of happiness(p .3).

Here Ardell, stated wellness as being about the balance between the external and internal factors and the experiences for living a healthy and happy life.

Holistic health is an approach to life rather than focusing on illness. This approach considers the whole person with the interaction with the environment. (Walter, 1999,p. 7). A holistic wellness approach distinguished the concept of health rather than focusing only on the illness but also the factors related like the social life, environment and person's understanding of his or her own health and their choices.

The term wellness has a complex past, the term focuses on active health promotion through lifestyle change which emerged in the 1950s and spawned the wellness movement in the 1970s (Miller, 2005,p.84).One of the most biggest and important trend the world has ever seen is wellness tourism taking over the world making people more conscious towards their health. "Health and Wellbeing appears to be a megatrend as it is one that can bring benefits not to a few, but to many with its emphasis on quality, and

on the healthy, sustainable and holistic aspects of tourism." (Dvorak, Saari & Tuominen, 2014, p.13)

Wellness is also linked with the quality of life or wellbeing of a people are living for their well-being levels "an individual's perception of their position in life in the context of the culture and value systems in which they live and in relation to their goals.(World Health Organization, 1997, p. 1)

However, the quality of life for a wellbeing of person determines the wellness level and the concept itself has many definitions. Thomas (as cited in Dodge, Daly, Huyton & Sandered, 2012) stated that the wellbeing is "intangible, difficult to define and even harder to measure" (p. 221).

Wellness can be defined as a positive approach towards living, which means, it is the mental attitude taken towards living a healthier lifestyle. Wellness has a direct influence on overall health which is essential to living a better life. The process of analyzing according to wellness in two different philosophies, which are hedonism, and reflects the view that wellbeing consists of pleasure and happiness (Kahneman as cited in Ryan & Deci, 2001, p.143) and the second view eudaimonism convey that wellbeing consists of fulfilling and realizing one's daimon or true nature (Waterman, as cited in Ryan & Deci, 2001, p.143). Both focus on the feeling of happiness, satisfaction and creative development on overall life.

Previously, authors defined health excluding these factors which were not taken as vital factors to live a good healthy and prosperous life. Dunn (1957) has stated that "the curing of disease and the saving of the life has been primary preoccupation, in those days the doctors and the physician were only focused on curing the disease and isolated the cause of illness" (p.225). Wellness focuses on prevention of illness or diseases rather than treatment and curing.

Another definition from Burn's (as cited in Dodge et al., 2012, p.223) physiological wellbeing (which he also referred to as happiness) being of primary importance for wellbeing. In previous research physiology was being isolated to know the cause of illness which Burns connected to positive and negative well-being.

Ardell (as cited in Miller & Foster, 2010) described wellness as "conscious choices involved in taking responsibility for improving the quality of one's life by adopting changes in various areas of lifestyles, resulting in high level of well-being"(p. 5). On the other hand Coulter (as cited in Miller & Foster, 2010) argued "wellness as a way of life where harmony of the mind, body and spirit is achieved through adopting a healthy lifestyle"(p. 6).

The above definition of wellness focused on choices made and taking responsibility and adapting the changes to improve the quality of life as stated by Ardell while Coulter argued wellness as a life harmony with the mind, body and spirit achieved through healthy lifestyles. Both emphasized the way of living life in a healthy way.

According to the World Health Organization (1998) wellness is "the link between social and economic conditions, the physical environment, individual lifestyles and health, these links provide the key to a holistic understanding of health" (p .1). In 2006, Smith Tang and Nutbeam, defined wellness as:

Wellness is optimal state of health of individuals and groups. There are two focal concerns: the realization of the fullest potential of an individual physically, psychologically, socially, spiritually, and economically, and the fulfillment of one's role expectation in the family, community, place of worship, workplace and other setting (p. 5).

In this definition in 1998 the factors like psychology and others were isolated and in the 2006 definition they included factors like psychological, family and community. The same concept was already defined by Dunn in 1957 health is not only about treating and curing the diseases but also considering that other factors and quality of life create the high level of wellness.

Dunn(1959) stated that wellness is a point of harmony which can be achieved through the physical, mental and spiritual unity undergoing the process of growth and adjustment with continuously changing physical, biological, social and cultural environment. Miller and Fosters(2010) also stated that health and wellbeing connected and interrelated body, mind and spirit. Hence , here both authors agreed.

The following are Dunn's(1959) wellness concept:

- Wellness is a continuous process for prevention rather than treating and curing the illness.
- Wellness is a preventive path for the future illness.
- Physical, mental, social, cultural and spiritual are the dimensions of the holistic health for high level of wellness.
- Wellness is the responsibility of the individual
- Wellness is about the conceptualization and interpretation of own's perception.

The dimensions of wellness were specified by the authors after their research, Horton and O' Fallon(2011) stated physical, emotional, social, spiritual, environmental, psychological and occupational as the dimensions for holistic wellness and can have positive impact.

Dunn (1959)stated some vision for the past which is extremely right for the recent time going on, "it is a shrinking world" the process of globalization and developed technology has made the world very small. "it is a crowded world" the boom in the population growth has made depletion in earth resources. "It's an older world" despite advancement in health sciences the problem is still arising. "It is a world of mounting tension, time is valuable and no time to engage socially to reduce stress"(pp. 786-787).

Wellness health and wellbeing are viewed from the holistic aspect of body mind and spirit, lifestyles and making balances with the internal and external factors to live a healthy and happy life. In recent time the wellness has shifted from focusing on emotional wellness and social wellness and others. Wellness is a megatrend shifting to a different dimension with the billion dollar market for a better future for mankind and actively pursue it.

1.2 Health and wellness tourism destinations

Tourism has been a gateway from the daily chores and activities for people, since very long ago. Tourism has been able to provide a sense of freedom and relaxation from the past to the people. In the past people used to travel to see new places, experiences new things along with the family and friends, but recently the perspective of tourism has been changed, people travel for other reason too, rather than having freedom, relaxation,

new experiences. "health tourism featuring an on-going development saw a dynamic development primarily in the area of wellness tourism and most significant movement are located in Europe" (Csirmaz & Peto, 2015, p. 755).

Kaspar(as cited in Chen, Chang &Wu 2013) states that:

"Wellness Tourism is a collective phenomenon where people intend to promote, stabilize, and properly recovery the body, mind and social wellbeing. They travel to where health services are provided. There are no fixed rules. These locations are not their residences or workplace"(p.1093).

Smith and Puczko(2013) defined wellness tourism as "journey involving the motive to maintain or promote their health and well-being, staying at a facility that is specially designed to enable and enhance body mind and soul"(p.25). This new reason for travelling to many places has evolved into wellness tourism destination.

Here, both the authors describe wellness tourism as a travelling process intended or aimed towards promoting the body, mind and wellbeing but Chen et al.,(2013) emphasized recovering by curing while Smith and Puczko(2013) emphasized prevention rather than curing and divided health tourism into two parts wellness and medical.

Smith and Diekmann (2017, p.10) stated that well-being tourism is based on experience dimensions and enhancing wellbeing with factors like "pleasure and hedonism" "meaningful experiences" and "altruistic activities and sustainability," mean that the motive of wellness tourism has been shifted towards the experiences along with curing and prevention.

"Wellness is usually connected to the peace, serenity and the isolated environment; the selection of the destination is influenced by the preferences towards the wellness" (Težak, Saftic. & Persuric, 2011,p.1931). Travelling and selecting a destination of tourists are affected by different factors and their preferences. The research done by Djeri, Bozic Stamenkovic and Nagy (2017) shows that the factors like price, income and education level have a greater influence in choosing destinations. Wellness being a megatrend, people explores knowledge for wellness and which drives people to choose a

destination influenced by wellness and also the education level of people towards wellness.

Many wellness concepts have been developed and designed from nature and by the use of its resources like nordic wellness, alpine wellness, forest wellness and lake wellness(Tooman 2013,p. 20). These wellness concepts are based on nature and resources for healing, relaxation and recreation which helped in developing the different types of wellness tourism destinations.

Nordic wellbeing is based on quality of life and tourism products typically oriented towards nature and outdoor experience and enjoyment combined with achievement, healthy local gastronomy, local culture and cleanliness of air, nature and water. (Huijbens, 2011, p.21). Tuohino(2013, p. 270), has also stated the Nordic wellbeing concept is associated with the nature, outdoor life, purity, healthy images and values of northern hemisphere.

Alpine wellness is a concept based on the natural settings in the Alps region combined with different ecosystem offering winter sports activities and relaxation within the Alps environment (Pechlaner & Fisher 2006).

Lake wellness is lake based activities, experiencing the lake landscape which leads to influence the sensory perception, feel relax and comfort within the nature (Konu, Tuohino & Kompula,2010).

Forest Wellness is utilization of forest based natural resources utilized for physical activities and relaxation/stress relief in the forest(Konu,2015).

The Wellness Tourism destination presented here, Germany has the complete potentially offer all forms of wellness, when compared with European countries it has vast natural resources like sea coasts, forests, thermal springs, hiking trails, lakes and alps region.

Wellness has been associated with health and relaxation through the alternative methods of treatment. In the field of wellness modern treatments like massage, body and face treatments and water treatment are in trends. Then, the traditional wellness trends

started emerging based on the natural resources, ancient rituals, herbal therapies, and ancient knowledge in healing in which people started exploring in traditions and merging the modern methods with the ancient techniques of relaxation.

A wellness destination is a selected area with necessary infrastructure and services developed systematically to offer health and well-being services chosen by the customer with the motivation of preventing and curing as the travel destination helps to improve their health and well-being.(Dvorak et al.,2014, p.22)

Voigt and Pforr(as cited in Dvorak et al., 2014,p. 22) wellness tourism destinations differ from other tourism destinations based on core resources and competencies:

- Natural resources with geographical features like mineral waters, thermal waters, landscapes and other natural assets like mud, plant clays facilitating tourist for physical activities and mental wellbeing.
- Traditional, historical, spiritual and cultural resources like meditation, yoga spiritual rituals like cleansing and purification and cultural like hammam and saunas inherited from the past.
- Complementary and alternative medical offering beside from modern medicines like massage, naturopathy, meditation, balneology and homeopathy.
- Health conscious lifestyle and community mindset and values developed and designed to work along with local communities.
- Qualified and competent human resource to deliver satisfactory level of services.
- Specific wellness structure for hotels and resorts, wellness related events for the community and visiting tourists and combined wellness services like nature based medical offerings along with local food and beverages

Haugland, Ness, Gronseth, andAarstad(2011) defined "tourism destination development as the activities involved in developing an overall strategy for the destination that generates value for the individual actors"(p. 270). Here, the authors stated that tourism destination development involves overall strategies for developing together core products of destinations. Resources and services are the core products for any destination, and development in other individual factors like society, economy, politics,

ecology and technology which plays an important role in the success of any tourism destination.

Dvorak et al.,(2014) developed and designed a framework for developing a health and well-being tourism destination. The success of a destination depends upon the core products, destination reputation and quality of the services enhancing the health and well-being.

Nature, natural resources, landscape, culture, authenticity and environment are the main components of any destination for health and wellness tourism development. It also increases the advantage and competitiveness of a destination. Reorganization of these resources and proper utilization as creating products for health and well-being services adds value to the destination. The health and well-being destination must include a wide offering of quality services e.g. wellness and medical treatment, sauna and pool facilities, outdoor and indoor sports and mental activities. (Dvorak et al., 2014, p. 28)

The customers beside choosing the health and well-being destination there are the other factors which motivate and make influences as the secondary or supporting tourism services. Quality accommodation, restaurants and transport services are the supporting factors for the destination. Easy accessibility to the destination, quality food and accommodation facilities must meet the customer satisfaction and the services which attracts the visitors.

Wellness is always about personal services provided to the customers. Staff plays a vital role towards the customer satisfaction. High level of hospitality and professional skills form the basis of customer satisfaction in health and well-being services. Staff should have social skills, communication skills, hospitality skills and professional skills to meet customer's satisfaction.

The development of sustainable, hospital attitude and atmosphere in the destination, and customer orientation are needed for any tourism destination to succeed. The sustainable dimension are socio-cultural (development in social culture and society) ecological (environment protection) and economic (bases for economic prosperity and increasing

life standard). Locals can help to create the welcoming atmosphere in destinations and understanding the customers expectation.(Dvorak et al., 2014)

Destination management and destination development are interlinked with each other for the completion of activities for the success of the destination. Here the authors Dvorak et al., (2014) emphasized the cooperation of all the actors for development, management, policy and services. Destination development is an ongoing process the vision, values and mission should be created collaboratively and evaluated which make all the actors work in the same direction for the success of the destination.

Destination management covers the dimensions like public and private network of organization, operational activities for health and well-being concept, observation and improvement of quality, strategic planning for destination, regulation for supporting health and well-being tourism along with health promotion, developed infrastructure and services. (Dvorak et al., 2014, p. 30)

These dimensions helps in developing and offering a competitive services for the tourists visiting the destination creating an identity and policies for the development of health and well-being destination.

1.3. Tourism destinations and destination competitiveness

This chapter will give an overview of tourism destination and its competitiveness with health and wellness destination. It gives the information about Germany's health and wellness tourism, types of spa resorts and tourist satisfaction about their stay in Germany.

Buhalis (as cited in Dvorak et al., 2014, p. 22) states that destinations are amalgams of tourism products, offering an integrated experience to consumers, considered to be defined a geographical region which is understood by its visitors as a unique entity. Here destinations are defined as tourism products and experiences offered to the visitors in the specific geographical regions which motivated consumers to visit for its unique entity.

Hu and Ritchie (as cited in Caber, Albayrak & Matzler, 2012) defined a tourism destination as "a package of tourism facilities and services, which like any other consumer products is composed of a number of multi- dimensional attributes" (p.43).

Jovicic(2016) described destinations as Geo-spatial areas that are characterized with physical and human attributes that can satisfy needs of the tourist. Here, the author defined the physical and human attribute which can be defined as the elements like attraction, service, infrastructure, entertainment and catering tourism enterprises and supporting organizations.

Tourism destinations are approached in different ways, tourism destinations are defined based on geographical and non-geographical concepts, from man-made attraction to natural attraction. Based on the above definition tourism destination comprises of the various factors not only the geographical attributes but the internal and external factors without which the destination cannot thrive. The elements like developed infrastructure, services, attractions, entertainment and activities will help to develop a destination, which will be able to attract the tourist without whom the geographical attribute cannot be a tourism destination.

The European Tourism Indicator System by the European Commission(as cited in Dvorak et al., 2014, p. 22) defines a tourism destination as below:

- A geographical area capable to attract tourist and visitors.
- A recognized area easily defined as a visitor destination having range of facilities and products in place for tourism purpose.
- A place or area promoted or marketed as a destination.
- A place or area able to measure visitor economy, supply and demand for tourism services.
- A place or area where range of public and private sector stakeholders including along with the community included in management process.

The term competitiveness is the quality or ability of a firm or a company to gain success based on their products and services in domestic level or global level market. (Plumins, Sceulovs & Gaile-Sarkane, 2016). A destination strives for a bigger market share increasing competition between destinations and the firms within the destinations,

increasing competition taking place globally and influencing the tourist experiences (Dwyer, Dragicevic, Armenski, Mihalic & Cvelbar, 2016, p. 1309). The level of competition takes place on different levels between the countries and the small tourism organizations and service providers within the destination.

Destination competitiveness is influenced by the macro and micro environments, macro factors (social, economic, demographic and cultural) the governmental elements where as the micro factors are the small organization offering products and services. Macro factors are a national concern with the goal to influencing the life of community, competition in international level and micro factors is organization competition in national level satisfying the desire of the consumer. (Omerzel, 2011)

According Goodrich (as cited in Andrades-Caldito, Sanchez-Rivero,&Pulido-Fernandez, 2013) states that "destination competitiveness requires an evaluation of tourists destination image"(p. 68). Competitiveness of destination can be affected by the image of the destination perceived by the tourist visiting to the destination. Moreira and Iao (2014) defined "destination image as the holographic complexity of perception" (p. 90). Ayyildiz and Turna (2013) described "image is the sum of beliefs, attitudes, and impressions that a person or a group has of an object that may be company, product, brand, place or person" (p. 85). According to these statements it can be said the image is the impression towards any place or object in relation to the perception of the people.

Based on the above statement, the image of a destination can influence the competitiveness of a destination. Destination's image is determined by the different two dimensions cognitive image and affective image. As mentioned in Ayyildiz & Turna (2013,p.85) a cognitive element of the destination image describes the beliefs and information that people have about the place whereas affective elements describe what people feel about the place.

One of the comparative research studies was between Germany and Spain of perceived tourism destination image on the bases of cognitive image affective and destination belief.The research results are as below. (Ayyildiz & Turna, 2013, pp. 86-88)

- 1) Respondents on the bases of cognitive country image reveals that the quality of life, economy, rich people, technology level, education, and modern country the Germany rated higher compared to Spain.
- 2) Respondents on the bases of affective country image the research reveals that in term of friendly and pleasant people Germany rated low compared to Spain, while in term of being a safe country, trustworthy people and ideal to live in Germany rated higher.
- 3) Respondents were asked about suitable accommodation and Germany rated higher than Spain, however in term of appealing scenery, quality attraction value for money and good overall destination Germany rated low.
- 4) Looking at the average factor in term of cognitive country image Germany rated higher, for affective country image both country scores were the same whereas in destination belief Germany rated low.
- 5) The respondents when asked about tourism characteristic come to mind when comparing the two countries, elements like geographic places, attractions, activities, food/beverages and others, Germany was rated higher but for natural elements and sport related Germany was rated lower. (Ayyildiz & Turna, 2013, pp. 86-88)

According to the above research by Ayyildiz and Turna, (2013) proves that destination images perceived by the tourist visiting Germany considers it to be a highly competitive destination on the bases of cognitive country image, but rated low on the basis of destination belief. On the other hand, the frequency of the tourist more than once is higher and the other data of people visiting to Germany more than 80% were for tourism purpose.

Looking at the reports published by GNTB (2013, p. 3) 4.5% increase in the number of overnight stays by foreign visitors was recorded in the year 2013. Comparing the results of research by Ayyildiz and Turna, (2013) and the reports by GNTB (2014) the increase number of visitors in Germany suggest that as competitive tourism destination.

Having a long history as tourism destination, after the national unification of Germany, drastic changes affected people's daily life, social life and tourism culture and also the number of tourist destinations was affected by the unification. Sung(2015) mentioned that after the system change, pressure to generate economic resources was the booster to

build facilities for tourism hotels restaurants, traffic system, maintaining the touristic infrastructures and to support the establishment of touristic destination. The process of developing Germany as a competitive tourism destination started long before the national unification. It was only the former East Germany that had developed new tourism destinations or regenerate them and open them up to wider markets.

"The vital side of Germany is the natural resources and landscapes, mentioning itself as a travel destination as a brand campaign" (Mayer, 2014,p. 579). Today, Germany presents itself as Germany the travel destination brand which includes natural landscapes, health and wellness, spiritual travel, attracting tourists towards German's Islands Barrier free Tourism (GNTB Annual Report, 2015)

To be a health and wellness destination a country should possess distinct physical resources, human resources providing skilled services and the infrastructure. Natural resources like mineral springs thermal are more valued and that can create a comparative advantage for wellness tourism and increase the competitiveness of the destination.(Dvorak et al.,2014, p.33). Germany is a country with the potentialities and having the resources as required for being a health and wellness destination.

The base for wellness and spa tourism is its natural resources and traditional treatment based on these resources. Germany offers landscape, nature , climate, outdoor activities, balneology, thalassotherapy including spa and wellness products with certified medical professionals. According to Pforr and Locher (2012,p.304) "till year 2007 traditional German destinations has already complemented their offering with holistic wellness programs".

There are numbers of thermal and mineral water with hot and cold water resources in Germany in the various parts of the country among them these are the famous and spa resorts which uses the resources directly from the sources. Baden-Baden, Achen, Bad fussing, Weisbaden, Bad Bevensen and Bad Worishofen etc.(Erfurt, 2011, p.169). Beside this there are "more than 300 spa resorts officially recognized by German Spa Association having highly qualified professionals offering prevention reconvalescence and rehabilitation treatment and services" Pforr & Locher(2012,p.303).

German Health resorts and spa are categorized in six different types which are presented in Table 1.3.1

Table 1.3.1Health Resorts and Spa Categories

Health and Resorts(Germany)	Health and Resorts (English)
Mineralheilbad	Mineral spring spa- hot or cold water
Moorheilbad	Mud spa, peloids
Soleheilbad	Brine spa, saline chloride water
Thermalheilbad	Geothermal or hot spring water
Seeheilbad(Thalasso)	Sea Spa, Seawater spa
Kneippheilbad	Kneipp spa based mainly on cold water
Source : Erfurt (2011, p. 178)	

There are different organization working for the betterment and development of wellness services in Germany. Deutscher Heilbäderverband e.V. (German Spa Association) who is responsible for all the aspects related to medical and health tourism industry and is also responsible for maintenance and development and delivering high quality standard service. Beside this there are other organization working for development and marketing the wellness tourism in Germany (Erfurt, 2011,p. 179):

- Academy for Balneology and Climatology;
- Institute for Medical balneology and climatology- University of Munich;
- Public Health Insurance;
- Association of German spa and Health Resort Medical practitioner;
- Association for Medical Balneology and climatology;
- German Association for Spas and Health Resorts;

Over the year these organization has been working and researching to provide authentic and high quality of services for wellness tourists visiting Germany.

In the year 2010/2011 the German National Tourism Board (2011b) has published quality monitor survey of tourism in Germany asking international visitors and German visitors about the satisfaction level while staying in Germany (Table 1.3.2.) and the satisfaction level according to federal state in Germany (Table 1.3.3.).

According, to table 1.3.2. international visitors were mostly satisfied with the landscape/scenery, atmosphere/ambience , townscape. The German visitors were mostly

satisfied with the landscape/scenery, atmosphere/ambience and wellness/spa facility. Wellness and spa facility has the same level of satisfaction among both international visitors and German visitors , which is quite satisfactory and important for a wellness destination.

Table 1.3.2. Tourist satisfaction staying in Germany

Field of Estimation	International Visitors	German Visitors
Accommodation	1.8	1.9
Food and Drinks	1.8	1.8
Opening times	1.9	2
Value for Money	2.2	2.2
Quality and Choice	1.8	1.9
Landscape/Scenery	1.7	1.6
Atmosphere/Ambience	1.7	1.8
Townscape	1.7	1.9
Wellness/Spa facilities	1.9	1.8
Active pursuits	2.3	2.1
Indoor Attraction	2.3	2.4
Choice of events/entertainment	2.2	2.3
Activities for Children	2.7	2.5
Arts/Culture	2.2	2.6
Marks : 1-Delighted ; 6-Disappointed		
Source: (German National Tourism Board, Quality monitor survey, 2011, p. 7)		

According to the below results, tourists were highly satisfied in Berlin and the other states like Baden-Wurttemberg, Bavaria, Brandenburg, Mecklenburg- Western Pomerania and the least satisfied state is Saarland . Berlin is the capital city having different cultural influences and rich history of World War II, while as the Baden-Wurttemberg and Bavaria are the states having spas towns having influences from the Roman rules. Baden-Baden one of the famous spa town is located in Baden-Wurttemberg and the famous Black Forest is within the Bavaria state. This also shows

that tourists are interested in visiting regions having spa resorts and which are close to the nature which make Germany a competitive wellness destination.

Table 1.3.3. Tourists satisfaction with stay by federal state

Tourist satisfaction by federal state	Rate
Baden-Wurttemberg	1.7
Bavaria	1.7
Berlin	1.6
Brandenburg	1.7
Bremen	n.a
Hamburg	1.8
Hessen	1.8
Mecklenburg- Western Pomerania	1.7
Lower Saxony	2
North Rhine- Westphalia	1.9
Rhineland-Palatinate	2
Saarland	2.3
Saxony	1.7
Saxony-Anhalt	1.8
Schleswig-Holstein	2
Thuringia	1.8
Marks :1-Delighted ; 6-Disappointed	
Source: (German National Tourism Board, 2011,p. 6)	

Wellness and spa tourism in Germany has history dated back to Roman empires 2000 years ago which is interesting for the research, what makes wellness tourists, needs motivation and satisfaction interesting for the researchers

The above sub-chapter has given information on Germany's wellness and spa, development of wellness tourism, country's strategic wellness resources, country's branding, self- identification and country's image, previous research on Germany's competitiveness, types of wellness and spa resorts in Germany, offerings and facilities for the tourists and their impression and satisfaction staying in Germany.

1.4. Tourist motivation to travel

In travel and tourism, motivation to travel has always been a key interest for the researchers. Ryan, Lynch, Vansteenkiste and Deci (2011) stated "motivation as a willingness and desire for change that comes from within" (p. 194). That may result in changes in our life and way of thinking. While Li and Cai (2012) described motivation as "disposition or state of need that drives an individual towards the types of action

capable to satisfying their needs"(p. 475). Here, the authors defined motivation as desire for change and motivation as action for the satisfying their need. Moreover it can be said that motivation is a factor affecting the peoples' lives in different ways including changes in the lifestyle or action to satisfy the needs.

Motivation is a crucial part of travel consumer behavior, but research on the relationship between travel behavior is surprisingly rare (Hsu, Cai, & Li, 2010,p. 282). Travel motivation has always been considered as the essential part of tourist behavior drawing attention from tourism academia and defining what constitutes wellness tourist is a first step for understanding those motivations (Li & Cai, 2012, p.475).

Wellness Tourism is described as action or desire of the people to promote, stabilize health and proper recovery of the body, mind and soul. Motivation for the wellness tourist is different than the other general tourists. Since wellness tourism is a new form of tourism, a better understanding of tourists wellness characteristics and their travel motive is needed (Damijanic & Sergio, 2013, p. 4).

There are various theories that has proposed to explain the factor influencing the travel motivation of the tourist but the most widely applied one is pull and push motivation concept (Damijanic & Sergio, 2013, p. 5). "Wellness is usually connected to peace, serenity and an isolated environment; the selection of the destination is influenced by the preferences towards the wellness" (Težak et al.,2011, p. 1931).

Push factor are internal motivations related to desire to travel while pull factors are external cognitive aspects that destination have to attract the tourist(Kassean & Gassita 2013, p. 3-4). Damijanic and Sergio (2013) also stated that "push factors refers to desire to satisfy the needs and pull factor s are attributed related to destination" (p. 5). Here both the authors have the similar view for the push and pull factors. In wellness tourism the pull factors are the nature, services lifestyle and other activities within the destination where push factors are the tourist motive to be in nature, rest and relaxation isolation and experience.

Various researches have been conducted to determine the motive or benefits of wellness tourists. Research by Pesonen, Laukkanen and Komppula (2011), based on benefit done

with 195 respondents concluded that the most interested segment for the tourist was nature, and enjoying nature based wellbeing. The other attributes in which tourists were interested were treatments, healthy and light food and additional services. The other interesting factor was that these tourists valued culture, history and different activities. However the segment of tourist in this research were interested in favoring natural landscape, peace and solitude.

Another research conducted in 2011 by Voigt, Brown and Howat was done within the Australian context and segmented wellness tourists into three categories: beauty spa visitors, lifestyle resort visitor and spiritual retreat visitor. The research concluded that, all three segments of wellness tourist seek transformation through escape and relaxation, beauty spa visitor motivation was psychological transformation through indulgence, and socializing spiritual retreat visitor's motive was spiritual and psychological transformation and lifestyle resort visitor motive was self-transformation through physical health and appearance. In the above research the main motive of the traveler was psychological transformation rather being in nature.

Another study conducted by Damijanovic and Sergio (2013) focused on tourists visiting seaside resorts based on pull and push motives. The authors conclude that the main motives of tourists visiting seaside resorts were relaxation and escape from everyday life and interaction with the local people where the pull factors were wellness services within the destination. In this research there were motives for psychological transformation and socialization.

Based on the above statement the motivation of wellness tourists vary according to the destination they planned to visit. Wellness tourist motivation are driven by the characteristic of the destination, financial status and the way they are travelling, e.g. alone or with the family (Pesonen et al.,2011).

Germany markets itself as a theme based destination, offering activities based on nature and infrastructure, city breaks, parks and garden, scenic route, nature activities, food and drinks (German National Tourism Board, 2018,p. 101). Moreover Germany is also famous for wellness tourism , Germany has a rich source of thermal water and provides the wellness services and facilities based on these resources. Spa towns with developed

spa facilities recognized and certified by German Spa association offers high quality wellness services.

Understanding a tourist profile, it is important understand the tourist preference visiting the countries, region, cities or other areas. Preferences are the external factors of individual tourists vital element that determine the attribute of the destination, preferences are more specific which reveal where tourists go and what tourist do (Amir, Osman, Bachok & Ibrahim, 2014, p. 83).

The tourism offering in Germany is based on nature and motivation of tourists visiting according to a survey done by the German National Tourism Board (2011), were to have fun/be entertained, to rest and relax, to be close to nature, to have an authentic experience, to rejuvenate the mind/soul, to be active/sporty, to enjoy excitement/challenges, to boost health/fitness, to receive beauty treatments. In addition tourists were also interested in other activities like to get to know new people, pampering, and to spend time with families. The top five choices for visiting Germany as a holiday destination were, Landscape/scenery, atmosphere/ambience, healthy air/climate, Leisure/recreational facilities and image of the destination. (German National Tourism Board,2011b)

Tourists visiting Germany main motivation were the nature and landscapes based on the above survey results, the push factors to visiting Germany were the activities like rest and relaxation, being close to nature, sports, health and fitness, challenges, pampering while the pull factors were the Germany attributes like landscape/scenery, atmosphere/ambience, healthy air/climate, leisure/recreational facilities.

From the above literature and research resulted that, wellness tourist motivation depends and varies according to the needs and the mindset of an individual to satisfy their needs. Wellness tourists main motivations are health and being in nature which makes them choose or visit a destination according to their needs. The other motivation factors for wellness tourists are spa, beauty and treatments, rejuvenate mind and soul.

Bavarian spa and health resorts which is officially recognized for recreational factors such as excellent air quality, providing opportunities for active recreation with

appropriate infrastructure and highly trained health specialists, Bavarian was number one destination for health and wellness tourism accounting 27% of all domestic health and wellness tourists and also 6% of international visitors mainly from Switzerland, Austria, Israel and USA. The motivation for tourist visiting this destination beside the recreational factors, these spas and health resorts specialize in traditional Kneipp water treatments which combine hydrotherapy with exercise, phytotherapy and appropriate nutrition for balanced healthy life-style (Pforr & Locher, 2012, pp. 305-306).

Another destination in Germany, Schleswig- Holsteinische Wattenmeer a coastal national park covering high proportion of Wadden Sea, a World Heritage site . The main holiday destination are the islands without protective dunes located a few kilometer off-shore. The destination is popular for overnight stay and as a day-trip destination. The motivation for tourist visiting this destination is rest and relaxation on seaside, hiking and cycling is the major activities which tourists engage themselves visiting this destination(Kalisch, 2012, pp. 531-532). These destinations has been visited by the tourist with the motive of health and relaxation and for vacations, to satisfy their need of rejuvenate mind and soul.

1.5. Motivation of Dutch tourist

Health industry has been one of the most important industry sectors emerging as a significant economic activity in some countries. Netherlands health care system was introduced in 1941 as Sick fund law based on the principles keeping recent promoted health care, care based on prevailing science, universal coverage and cost effectiveness (van Weel, Schers,& Timmermans, 2012, p. S12). Although Netherlands have introduced health care system in 1941 but the system were made on the medical sciences focused on the treatments rather than prevention. In which people were assigned with the family physician who provides health care and access to specialized care.

In 2006 universal private insurance was introduced whereby patients are covered by single insurance company by health care which introduced competition between the insurers negotiating best care with best price for the Dutch people (van Weel et al., 2012). This competition made insurance companies to work with the health professional

design health programs based on the need of the Dutch population. Under new insurances programs, the insurer were able to provide the health services like disease prevention, chronic care management, mental health services, care for families along with the children.

These shifts in insurance programs family physician were able practices with many other professional in the community like nurses, mid-wives, physiotherapists, psychologist, dieticians, speech therapist and occupational health physicians to provide better health services for the Dutch people.

According to van Weel et al., (2012) the increase in aging population and one fifth of Dutch population are the immigrants are another challenges for Netherlands health system these segments are personally responsible for their health. Authors has also suggested initiate practices for these patients with population based actions in promoting healthy foods and active lifestyle.

In Europe countries like Germany, a wellness modeled countries where wellness is regarded as a second health care market is supported and financed by the state and the insurance companies (Vork & Lombarts 2014); Pforr and Locher (2012) made possible for the Germans enjoy wellness and preventive health care facilities which is available throughout the country.

Netherlands health care system must also introduce and supports wellness and preventive health care facilities for the Dutch people services like wellness and fitness offering, alternative medical treatments, preventive health measures and spas focusing on prevention than curing , which can helps in reducing the health related expenses with a better health and wellness services and also attract the international tourists.

The term wellness is still unknown among the Dutch people take less interest in wellness sector as they are a very good travelers. The reasons Dutch people do not take any interest in wellness tourism is that "the image of wellness in the eyes of Dutch people is still unnecessary luxury" (Vork & Lombarts, 2014).

In Netherlands people are still focused in care based on prevailing sciences, curing the disease rather than preventing and no attention are given to prevent the chronic illness.

Due to lack of people interest towards wellness Dutch people are unable know the effects of wellness, "the effects of wellness received little attention" (Vork & Lombarts, 2014). The wellness is a new tradition for the Dutch people as they do not have any tradition for spa like other countries, can be understood as new phenomena to which Dutch people have no interest.

In Netherlands there are more than 60 large wellness centers, hot baths and sauna, but still this centers are not able to offer the wellness services due to the lack of promotions and advertisement (Vork & Lombarts, 2013, p. 407). Lack of market and promotion despite having the wellness sources Netherlands is not able to offer the services in the international markets. Besides having large wellness centers with spa and wellness facilities not able to serve and offer the services in unclear positioning of these wellness centers.(Vork & Lombarts,2013, p. 408)

Netherlands has plenty of natural wellness resources to offer to tourist and the Dutch people vast seacoast and typical climate and atmosphere as of other European countries. One of the most tourism resource area is Dutch Wadden area a world heritage site internationally renowned natural area with ecological qualities and uniqueness (Sijtsma, Daams, Farjon & Buijs,2012, p. 138)

In 2014 the Netherlands coasts was the most popular holiday destination. Both domestic and international tourist have visited these coastal areas(Kruizinga 2016). Dutch people likes to live and visit coastal areas as Netherlands is one of the smallest nation in Europe, densely populated and urbanized area with very few rural areas (Brooker & Joppe,2014,p. 346).

Dutch tourists like to visit other countries like other European countries , they have their own sea side and other natural attractions but like to travel Germany because of different landscapes, culture food and quality. One of the other reason that Dutch tourists to visit Germany is , Netherlands comparatively a smaller country than Germany and the concentration of natural attractive area is high in Germany than Netherlands (Daams and Veneri, 2017,p. 521).

The term wellness is still not so important in Dutch people which are also one of the reasons for the underdevelopment of wellness and preventive treatment facilities, until the citizens acquire individual responsibility for their own well-being the development in the area of wellness is still difficult (Vork and Lombart, 2014). The Dutch people may not be interested in wellness but they often travel to other destination are ranked high tourism market source for the country like Germany and second for the Spain which shows that Dutch people like to travel out of their country

As the major market source to German Tourism industries we must know the motivation and reason to travel Germany so frequently. (German National Tourism Board, 2011b)

Netherlands and Germany are neighboring countries and the weather condition and geographical conditions are almost similar. Being Netherlands a major source market, the reason for frequent visits to German destination by Dutch traveler can be understood by the motivations and preferences of Dutch traveler.

One of the studies done by Jeuring (2017) on domestic level for satisfaction and perceived attractiveness, the results showed that weather and nature were perceived as a priority for the Dutch traveler while taking a vacation. Another result was that the Dutch traveler had a less positive attitude towards domestic vacation which may be the reason they like to travel to another destination. Another finding was that the respondents did not perceived difference in climatic circumstances as may be they tend to travel Germany having same climatic circumstances.

From another qualitative research by Budeanu (2007) on sustainable tourist behavior the findings were following:

- The Dutch traveler wants to travel to destinations having good environmental quality.
- Dutch travelers were interested in accommodation combined with the environment.
- While searching for accommodation Dutch travelers desired eco-label hotel for which protect the environment.
- However, Dutch travelers were against to pay extra for environmental protection.

Based on the above research the Dutch traveler likes to travel and stay in those places where services are combined with the environmental factors, but they were not interested in paying extra to protect nature.

Another research conducted by Ayyildiz and Turna (2013), with 363 Dutch traveler asked about the tourism characteristic that come to mind while visiting a tourist destination. The responses were as follows geography, attractions, Activities, Nature related, Sports related, Food/Beverages, and others. In this research also the priorities of Dutch traveler are landscape and nature to visit the destination the other were activities related to nature, sports and adventure.

Based on all of the above researches about Dutch traveler, the motivations for the Dutch traveler are nature being in nature and activities and adventures. Dutch people are interested in other different activities like visiting attraction sites, food and beverages of the country and even the well designed and eco concept accommodations.

According to GNTB (2018) Annual Report the purpose of Dutch tourist visiting Germany were as follows: 77% holiday trips, 7% business trip, and 16% VFR/others. The most visited German states were Rhineland-Palatinate which is the state with a World Heritage castle and different attractions like hiking and cycling. Other state was North Rhine Westphalia , Bavaria and Baden Wurttemberg. These two state have several spa towns and thermal resources which are famous as wellness destinations as well as nature activities.

According to the preferences and motivations, Germany is a very suitable tourism destination for the Dutch people. They love to be in nature and drive through natural landscapes and attractions. Germany has full potential for these Dutch travelers to satisfy their needs as described above. What makes it a competitive destination for the Dutch are different climates and regions , lakes, rivers and Alps with nature, walking,hiking and adventure in which the Dutch travelers are interested. Another main reasons for Dutch to travel frequently is the distance between the two countries. According to Ayyildiz and Turna (2013,p. 86) 40% of Netherlands population works part time which is why they frequently travel, as they have more time but less money to spend.

Motivation to travel and the preferences are the main factor affecting the travel behaviors guided by the pull and push factors. As the above chapter stated that motivation and preferences depend upon the people preferences and the area or region they are living. Dutch traveler like and are motivated with environmental factors and like to involve themselves in nature related activities.

2. GERMANY AS A HEALTH AND WELLNESS DESTINATION

2.1. History and development of spa and resort in Germany

Spa and thermal bath culture was born in the ancient Greek times and was experienced all over the Europe only after the Roman settlements took over the Europe which was the experienced as the golden for the spa culture. The history of the origin of wellness and spa records is well acknowledged to approximately 3000BC.(Gianfaldoni et al., 2017, p. 566). In the past health and wellness spas were frequently linked with the natural thermal springs based on the beliefs of healing powers of the water.

In context of Germany the development of Spa and wellness started after the Roman civilization conquered lands all over the Europe and Balnea were built often with special area dedicated to sauna or the massage near the natural thermal springs. The Roman thermal baths became a social experience as well as had medicinal emphasis and they were used as recuperation centers for the wounded military soldiers beside which cleansing, exercise, socializing, relaxation, and worship medical treatment was also applied extensively. (Gianfaldoni et al., 2017,p.567)

These influence Roman civilizations helped in development of thermal bathing and spa towns and resorts in Europe as well as in Germany. Boekstein (2014,p. 3) has also stated "in 17th century European thermal springs were developed into spa resorts which given rise to well-known leisure centers such as Baden-Baden in Germany". During this era many other thermal water resources emerged to be spa towns providing the curing and leisure facilities.

Spa and resorts are the major market for the health and wellness destination. The development of spa resorts in context to using the natural and mineral resources has

been going on in Germany. Pforr & Locher (2012, p.298) stated that, German Health care has been under increasing pressure over the past decades due to escalating health care costs, number of reforms has been introduced to ensure a fair and sustainable financing of health care system. These reforms has significant impact on the health and wellness tourism market posing great challenges and opportunities for the industry influencing the travel behavior taken as a positive trend for the traditional spas and health resorts in Germany.

Pforr & Locher (2012, p.299) also stated that, due to cost cutting measures these destination were forced to diversify the their offering to include wellness, preventive and health promotion programs to compete for the rapidly growing number of self-funded health and wellness tourists.

There are number of spa town in Germany that offer this services based on their particular natural resources found in the area of these towns. Erfurt-Cooper and Cooper(2009, p.243) has mentioned that these traditional spa towns date back to the Roman around 2000 years ago. Cities like Aachen, Wiesbaden, and Baden-Baden are only the few well-known names of German hot spring destination.

Between 1997 to 2000, different health care system reforms were made which have significant impacts on spas and health resorts took place which saw stronger focus on preventive and rehabilitation treatment, although these reforms were partly counter-balanced by stronger emphasis on general prevention and rehabilitation measures promoted outside the traditional "Kur" programs , these officially recognized spas and health resorts within the Germany developed more and more health promotion and wellness offerings as a second business platform alongside the traditional "kur" treatments based on their existing infrastructure, expertise and reputation in doing so. (Erfurt-Cooper & Cooper, 2012, p.304)

The desire for healthy lifestyle within the German community has also created opportunities for new health services in a leisure setting as well as new products and services specifically geared towards the tourism market (Voigt & Pforr, 2014, p.261). These desires of the German community for healthy lifestyle helped in development of

spa services and new products for wellness which enabled to grow German Health and wellness tourism serving national and international tourists.

Beyond the desire of healthy lifestyle, the shift in demographic groups German's senior has also been a main driver for the demand and development of the health and wellness tourism in Germany, as tourism habits as these seniors have been enjoying travel and related leisure activities within the country. Voigt and Pforr (2014,p.265) has also mentioned in their case study "attracting wide range of consumers, wellness products, spas, health resorts with a range of fitness and sports, beauty care, relaxation, meditation, lifestyle and weight-loss programs along other health and wellness related products will therefore constitute important columns of Germany's tourism sector in the years to come."

The above section showed the history and development of German Spa emerging from the different factors like high cost of basic medical treatments, socio demographic changes, people interest towards the healthy lifestyle and moreover German people later on who were focused on prevention that cure.

The following chapter focuses on the one of the vital markets of German tourism that is European tourists, understanding why they choose Germany as a wellness tourism destination on the bases of their profiles and motivation, what satisfied their senses in terms of facility and experiences, The aim of this analysis will be able to analyze how far Germany is a, competitive wellness destination and what could be improved.

2.2. Germany as a competitive wellness destination

Germany or Deutschland officially Federal Republic of Germany is one of the biggest nations in western Europe having a landscape of forest, rivers, mountain regions and North sea beaches covering the area of 357340 square kilometers and having population approx 82.67 million. It is bordered by Denmark, Baltic sea and North Sea (North) Netherland, Belgium, Luxembourg and France (West) Switzerland and Austria (South) and Czech Republic and Poland (East). Since 1957 Germany was a member of European Union. (Facts about Germany, 2018)

The average temperature throughout the year in Germany is 21.8 degree Celsius in summers and -2.8 degree Celsius in the winter. Generally, Germany is favored with the temperate climate high temperature in summers and low in winters. In respect to its large area Germany has distinctive geographical features connecting to the Alps in the south, having the coastline of 2389 km with lakes, moors, marshes, valleys and woodlands. 31.8% of the land is covered by the forest having unique biodiversity of plant and animals having 28000 plant species and 48000 animal species. (Facts about Germany, 2018)

According to World Travel and Tourism Council (2017, p. 1), report, in Germany the tourism contributes 10.8% of the total GDP, 14% of the total employment, 3.9% of total investment towards the tourism sector and visitor export generated 46.7 billion USD in 2016. Despite having economic stability through other factors of investment and development, tourism contributes a fair amount towards the German economy.

In 2016 Germany recorded 80.8 million overnight stays by foreign tourists and became the second most popular destination for Europeans after Spain. More than 73.7% of overnight stays was made by visitors from other European countries and the rest was made by visitor from another continent. Germany's inbound tourism sector, generating 1.1million more overnight stays than compared to last year. German National Tourism Board, 2017,p. 24)

Based on the information above tourism supports the German Economy and also based on the topography and natural resources Germany has the potential of being a wellness Tourist Destination. The main assets of German Health and wellness tourism are thermal water resources, sea, mountains, lakes, clean air, sunshine and other local attraction.

2.3. The German market for European wellness tourist

In this chapter statistics tourists travelling to Germany are presented, data along with the whole world and narrowing to European Union and the German, market segmentation and trends of European consumers are also covered.

According to UNWTO forecast international tourists arrivals for 2018 around the world is following: Europe will see growth of 3.5%–4%, Asia and Pacific will welcome the tourist with the growth of 5%–6%, the Americas will enjoy the growth of 3.5%–4.5% , Africa will see the growth of 5%-7% comparing the last year and Middle East Will see the growth of 4%-6%. (UNWTO, 2018, p. 13)

In Figure 2.3.1. shows the arrivals based on the continent. Arrivals from Europe increased by 8.4%, arrivals for Asia-Pacific increased by 5.8%, arrivals from the Americas increased by 2.9%, while arrivals from Africa increased by 7.8% and Middle East increased by 4.8%. Germany is the most visited destination by the Europeans and least visited by Africans. In 2017 the total arrivals were mostly European with the highest in term of increase of 8.6%.

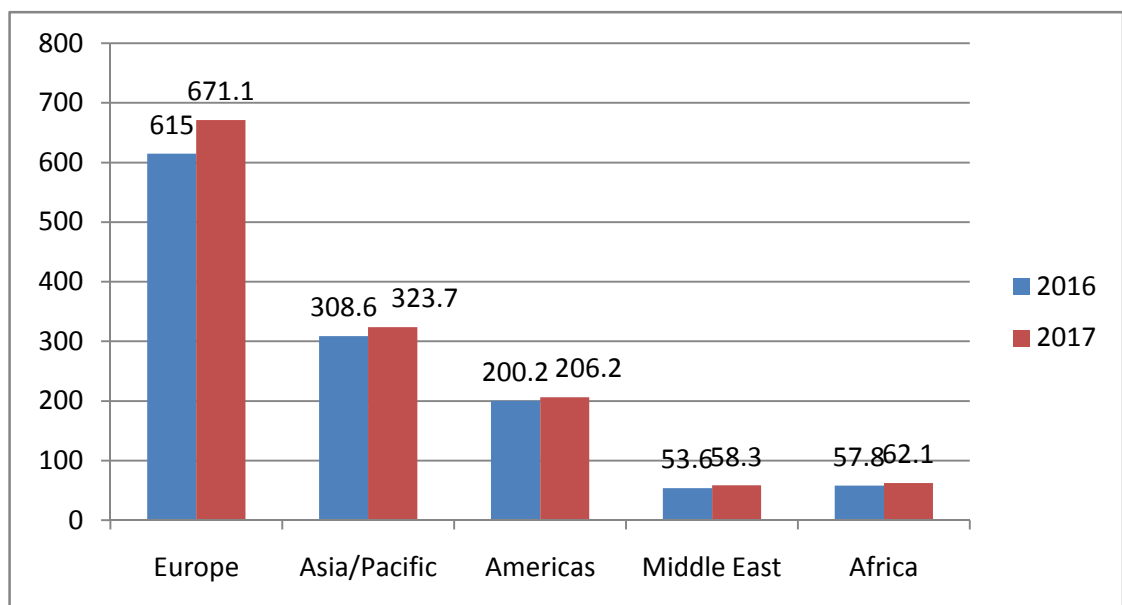


Figure 2.3.1. Arrivals in Germany from Worldwide in Millions. (German National Tourism Board, 2017a, p. 23; 2018a, p. 23)

According to, Figure 2.3.2. the major source market for German tourism is the European countries, Netherlands is the top most source market for Germany. In 2016 tourist traveling from Netherlands to Germany was 11.3million which showed the decrease of 0.88% accounting to 11.2 million visitor from Netherlands to Germany. The other major source market is Switzerland with the growth of 1.5%, USA with the

growth of 8.7.0% , Great Britain with the growth 0% and Austria with the growth of 8.1%.

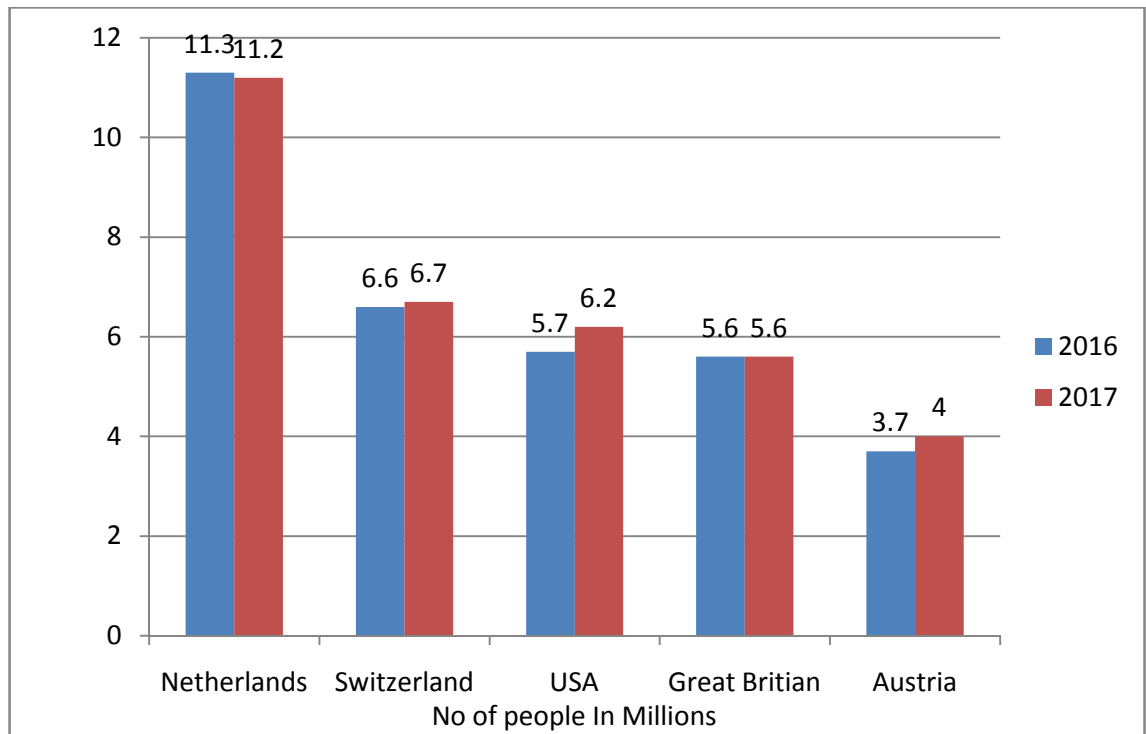


Figure 2.3.2. Top five source market for Germany. Sources: German National Tourism Board 2017a, p. 11; 2018a, p. 11)

According to GNTB, Annual Report (2013-2017) the arrivals of international tourists has been increasing over the years (see figure 2.3.3.) the amount of arrivals in the world in 2013 was about 1035 million and has significantly growth over the year. In 2017 the international arrivals from the world was over 1322 millions. Looking at the chart of European arrivals the year 2013 over 534 million having the growth over the 671 million in 2015. From 2013 to 2017 European arrivals contributed 50 percent in the world total arrivals but the following year shows not significant arrivals form the European regions. Comparing both charts the international arrivals for other regions of world has contributed to the growth of the total international arrivals in Germany.

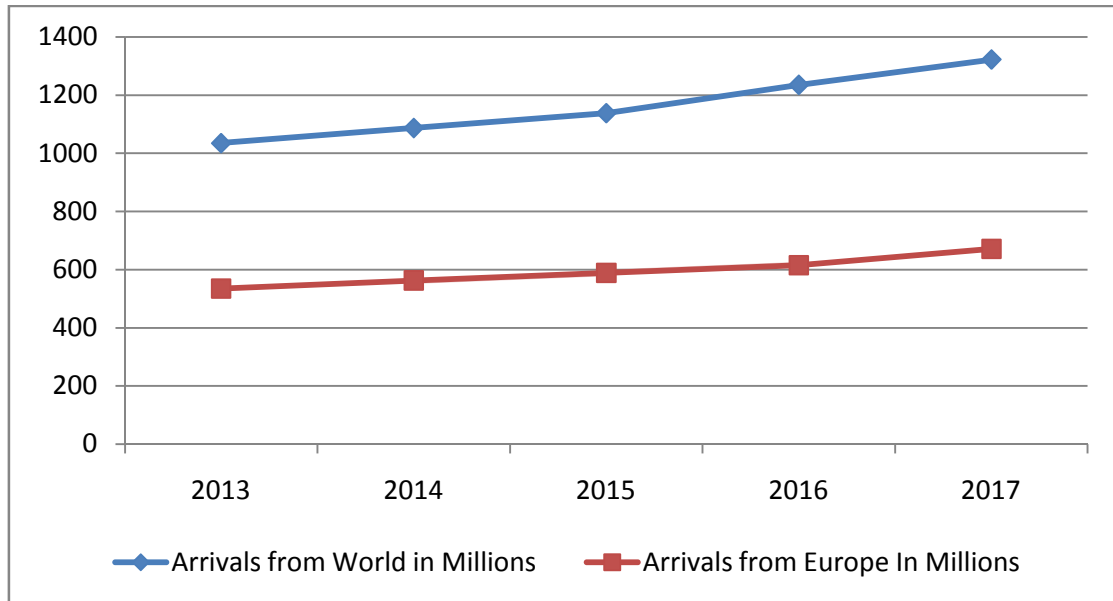


Figure 2.3.3. European Tourist Arrivals in Germany(in Millions). Sources: German National Tourism Board, 2014b, p. 3; 2015b, p. 3; 2016, p. 23; 2017a, p. 23; 2018a, p. 23.

Figure 2.3.4. shows the average length of the tourist stay in Germany, starting from 2011 but over the time the average length of stay has been decreasing. In between 2011-2015 the highest average length of stay was 6.4days in 2012 and the least average stay was recorded in 2015 6.1days. As all in the European region the least visited month is February as the dead season and the most visited months are June, July and August.

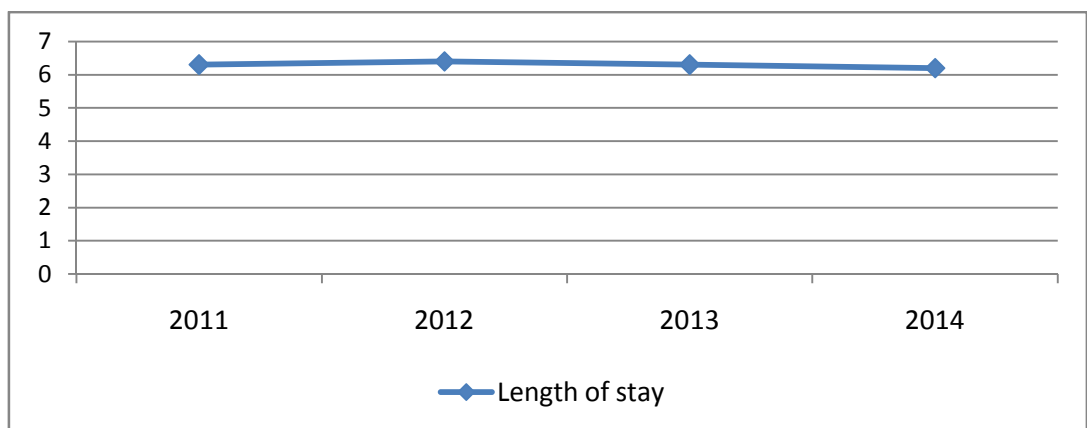


Figure 2.3.4.Average length of Stay (in days). Sources: German National Tourism Board, 2012, p. 8.; 2013, p.8; 2014b, p. 8; 2015b, p. 8

Figure 2.3.5. shows the overnight stay share of tourist visiting Germany, 56% tourist mostly prefer to stay in hotels which mostly have spa and wellness facilities, 19% stays in bed and breakfast hotels, 6% of tourist in campsite, 4% in hostels and apartment respectively, 3% of overnight stay is shared by holiday centers, inns, guesthouse respectively and 2% are the others. The information also proves that tourists visiting Germany prefer wellness and spa as most of the hotel provides the wellness and spa facilities. Germany has a relatively high supply of wellness facilities in their accommodations. Mainil, Eijgelaar, Klijs, Nawijn, & Peeters (2017, p .9)

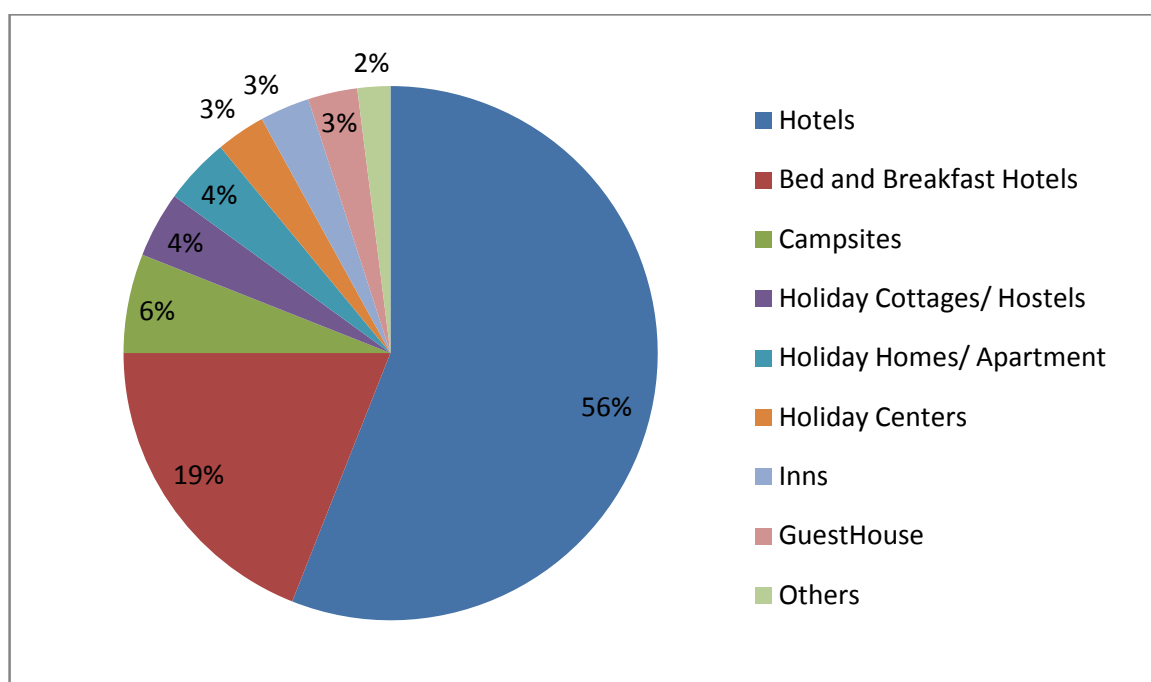


Figure 2.3.5. Overnight stay share of international tourist in 2015. Source: German National Tourism Board ,2016

In the Fig 2.3.6. shows the arrivals of the tourist in Wellness and Spa resorts according to (Deutscher Heilbäderverband, 2017) German Spa Association the arrivals in German spa in 2016 was recorded 25.34 million and in 2017 26.78 million which has increased, while overnight stay for 2016 was 117.32 million and in 2017 it was recorded 120.97 million which shows increase in overnight stay. In 2017 out of 4.6million arrivals 2.3 million were from other countries and the rest were German tourists.

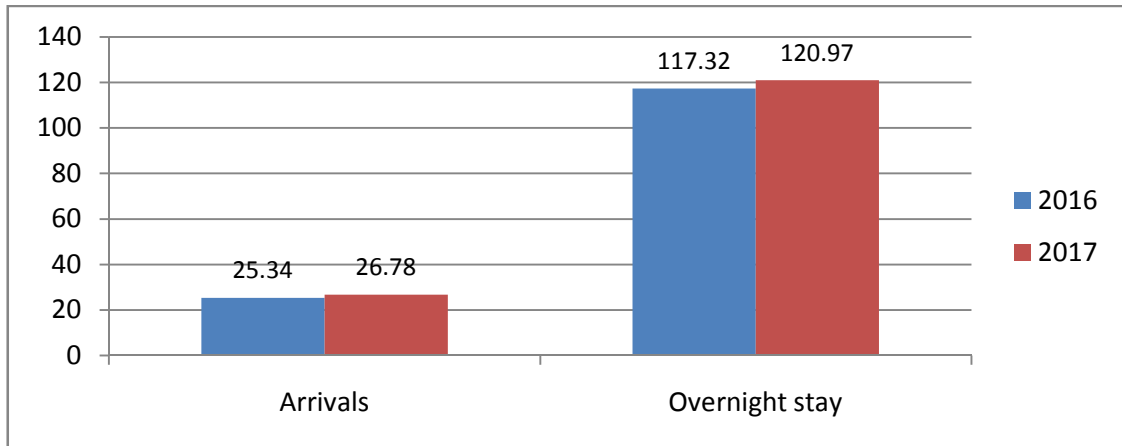


Figure 2.3.6. Showing Tourist arrivals and overnight stay in German Spa and Resorts year 2016 and 2017 (in millions),Source (Deutscher-Heilbäderverband,2018, pp.7-8)

In the figure 2.3.7. arrivals in the German Wellness facilities according to the types of resort. In 2016, mineral and mud spa bath arrivals was increased by 5.6%, in climatic health spa saw increase of 8.2%, in sea and healing resorts was increased by 5.7% and Kneipp Spas was increased by 1.4%. In 2017 highest arrival was recorded at mineral and mud spa resorts and the lowest were in Kneipp spas.

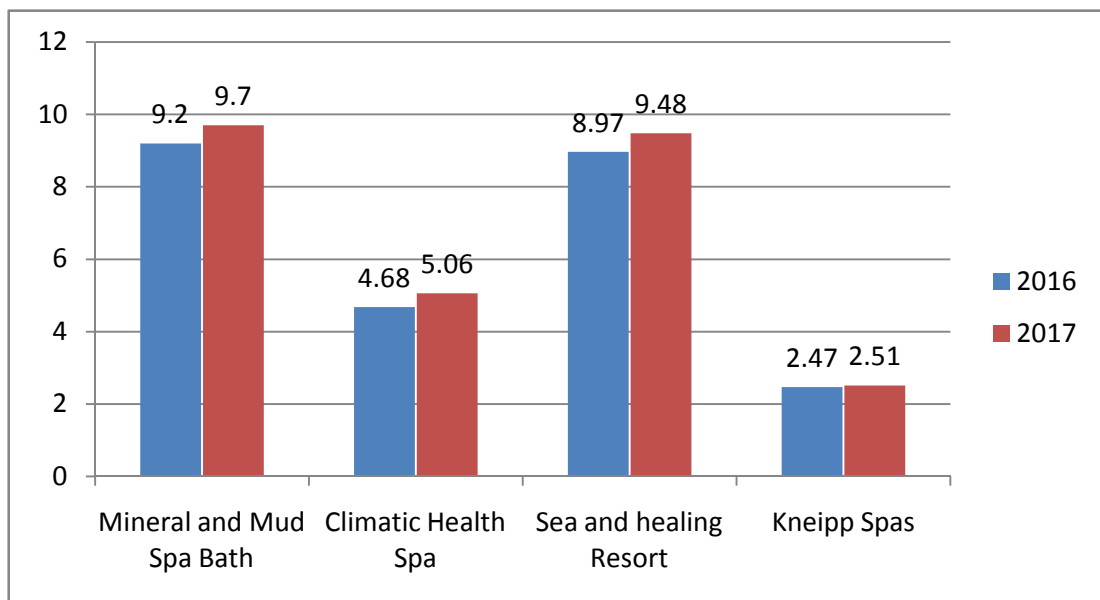


Figure2.3.7. Tourist arrivals according to types of Spa and Resort (in millions). Source (deutscher-Heilbäderverband,2018, p. 7)

The Figure 2.3.8. Showing overnight stays in German Spa and Resort according to the spa categories in 2017. Tourist tends to enjoy more mineral and mud bath and Germany is also famous for its thermal water treatment tourist also seems enjoying seas and climatic resorts in Germany and the least overnight stay was recorded in Kneipp spa.

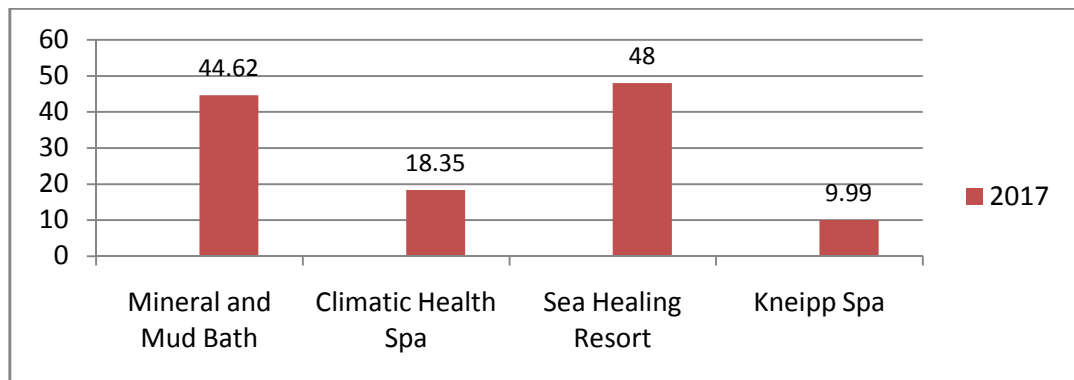


Figure 2.3.8. Tourist overnight stay according to types of Spa and Resorts 2017 (in millions) (Deutscher Heilbäderverband, 2018, p. 8)

According to (Deutscher Heilbäderverband, 2017) the top five major foreign markets were Switzerland, France, Netherlands, Belgium and Israel. The majority of tourist visiting and enjoying German spa and resorts are from the European Nations

It is important to emphasize European customer's behavior and leisure sociology towards wellness tourism in Germany. The inbound tourism from European region is the main market for the wellness tourism in the Germany. In Europe 77% of wellness tourism accounts from the domestic tourism from the European region. (Global Wellness Institute, 2014, p.50). According to Global wellness Institute (as cited in Kazandzhieva, 2014) has also stated, spending capacity of wellness domestic tourist is about 150% more than average domestic tourist and which is much larger than international tourism representing 84% of wellness tourism trips and 68% of expenditure (pp. 4-5).

(Csirmaz & Peto, 2015, p. 755) stated that, "regarding wellness data there is no uniform measurement system the comparison of data on recreation and wellness seeks to introduce international and national trends in tourism to make wellness services competitive and trustworthy.

The above chapter presents the data of past year of German's tourism which gives a view of tourism market in Germany. The statistics presented above is based on published by the German tourism board according to the availability and the survey report published which may be not as of same year.

2.4. Research methodology

Health, spa and wellness by Germans and European consumers were taken as the alternative treatments, after the fundamental medical treatments become expensive and the older generation of the population segments has become more interested in preventive treatment than curative treatments. Beside this other European countries has been able to involve themselves in health and wellness taking the advantages of the wellness facilities in Germany

Germany has long history of wellness culture and infrastructure, despite its potential features still Germany is a satisfactory wellness destination and possible to draw and gain bigger percentage of the European tourists. European share the bigger percentage of tourists arrivals coming to Germany motivated by their consciousness towards health and with the developed wellness facilities in Germany

Two types of research methods are used in this paper, qualitative and quantitative. Aborisade (2013, p. 48) stated qualitative research is utilized when there is need to work with words and images, qualitative research lies in the use of interviews which allow qualitative researcher to conduct an in-depth investigation. This method is particularly useful for researching the people thoughts and motivation and desired expressed in words. The data of content analysis are audio, textual and visible versatile enough to be used from content analysis. (Stemler, 2015, p. 1)

The study for tourist activities in the destination was undertaken using content analysis through the trip advisor reviews reviewed by tourists. Author chose the states which were mostly visited by the Dutch in 2017 according to German National Tourism Board (2018). This will help to know about the activities tourist undertake in those region which were mostly visited by the Dutch tourists.

The information was collected from Trip advisor in September and October 2018, first 100 reviews for the Spa hotels and main attraction in the region. The total number of reviews collected were 500. At first data was recorded in Microsoft word. The data was sorted according to key words used by the reviewers expressing their thoughts either positively or negatively towards the attributes of the destination. After sorting the data they were converted to qualitative analysis software QDA Minor. The key words were picked by the software after going through the data.

Since it is qualitative research, coding was done according to keywords related to activities of tourist during the visit to the destination, which yielded 43 primary codes and later these codes were categorized in to five main codes. Activities related to 'nature and atmosphere', 'spa and wellness', 'sports and adventure', 'cultural heritage' and 'other activities'. The regions and the facilities from where the reviews were collected is detailed in as below table.

Table 2.4.1 Tourist reviews retrieved from Trip advisor

Name of state and establishment	No of Reviews
Bavaria State	
Hotel Rebstock	50
Furstengarten	50
Total	100
Baden Wurttemberg State	
Kur Haus Baden Baden	40
Leonard Hotel Baden Baden	30
Lichtentaler Allee	30
Total	100
Rhineland- Palatinate State	
Rhine Valley	100
Total	100
North Rhine Westphalia State	
Hyatt Regency	50
Freitreppe Kolner Rhineboulevard	50
Total	100
Rugen Island	
Hotel Hanseatic Rugen und Villen	38
Travel Charme Kurhaus Binz	26
Hotel ammeer and spa	36
Total	100
Grand Total	500

The reason for choosing the quantitative research for this purpose as it enables reaching large group of people for getting their opinion. Yilmaz,(2013) stated that "quantitative measures aims to predictions and generalization naturalistic methods for data collection and analysis, and aims to provide an in-depth understanding of people's experiences and the meanings attached to them"(p.323).

Official statistics were also used as secondary data collection and analysis in order to review the existing information about the German health, wellness and spa tourism was applied in the beginning of the empirical part of the paper.

The research was conducted with a questionnaire method on a paper consisting of 15 questions (see Appendix-2), a five-point Likert scale was used for several questions for respondents to rate their satisfaction, where most of the questions were closed type and multiple choice. As the required personal opinion was fulfilled by several open questions the respondents were able to express their views.

The survey for the research was done in the months of June and July in 2018 in Wilhelmshaven, Germany in a Home Hotel a spa hotel in the town. The reason for doing the survey in this region was as author has done internship and was working in the same hotel, and another region was that it was near to Netherlands border where most Dutch people travel.

The questions were compiled to collect information like demographic status, ways of in travelling, number of visits, reason for the visit, important features of the destination, likes and dislikes, ways of travelling, competitiveness of the destination, problems faced during visiting and staying in the destination, satisfaction and possible improvements.

Research was concluded by 108 respondents, collected using a European from outside Germany visiting for Germany for wellness and spa were targeted.

Respondents were invited and asked personally to fill in the questionnaire and data were transferred to excel sheet and open questions were also transferred classified and analyzed. However the confidentiality of the respondents were maintained.

The chosen method was appropriate for reaching enough respondents, and provided the flexibility for gathering data and can interact with the respondents.

Results of the research and analysis are presented using figures and tables with explanations from the information derived from each of the questions. This chapter unites the research data and theoretical part in order to sketch out the competitiveness of Germany as a wellness destination and wellness market and Dutch motivation.

2.5. Result and discussion

Results of content analysis as, in Figure 2.5.1. the people visiting Bavaria state were highly involved in activity related to the nature and atmosphere, but the least involved were activities related to spa and wellness and adventure and sports, in the state Baden Wurttemberg the tourist enjoyed being in outdoor in the nature and were also involved in the activities related to spa and wellness and other activities (e.g. Shopping, food and visiting casinos). In the Rhine Palatinate region tourists were highly interested in visiting the churches and castles and also many enjoyed being in nature. In the region of North Rhine Westphalia tourist were enjoyed shopping, casinos, and the foods in the restaurants. People visiting Rugen Island were highly involved in activities related to nature and atmosphere, and people liked the visit in sea coast and relax and were happy indulging themselves in the activities related to spa and wellness.

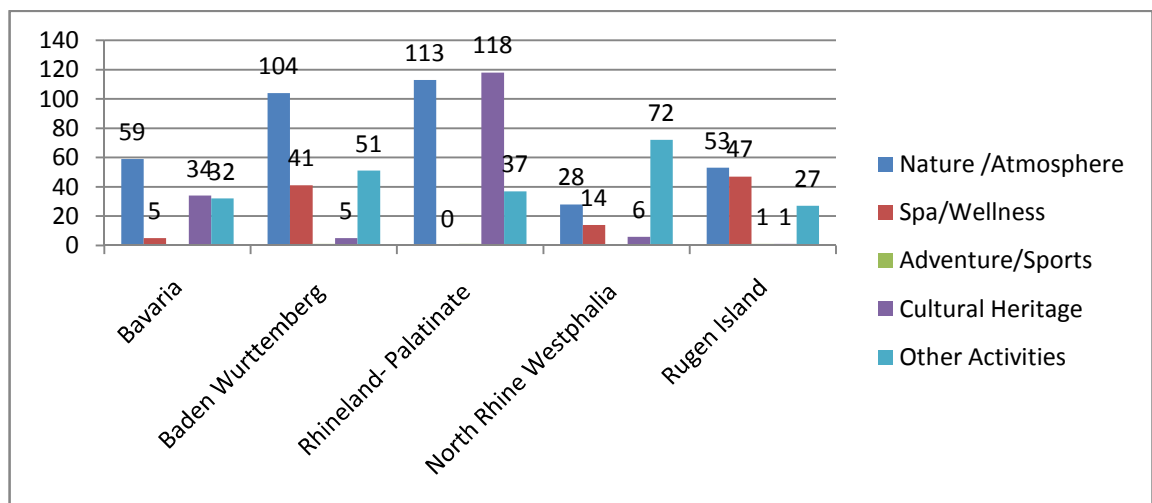


Figure 2.5.1. Tourist activities Region wise

In figure 2.5.2. combining all the tourist activities, the figure shows that tourists visiting Germany were highly involved in the activities referred to 42% of the tourists mentioned their satisfaction or dissatisfaction towards activities related towards nature and atmosphere. Tourists seemed to be enjoying being in nature and resting and relaxing in nature. People were also highly involved and satisfied in doing other activities like shopping, trying new food and restaurants and visiting casinos were about 26%. People who enjoyed cultural heritage and spa and wellness respectively were more than 19% and 12%, and the least mentioned activity was sports and adventure by 0.35%.

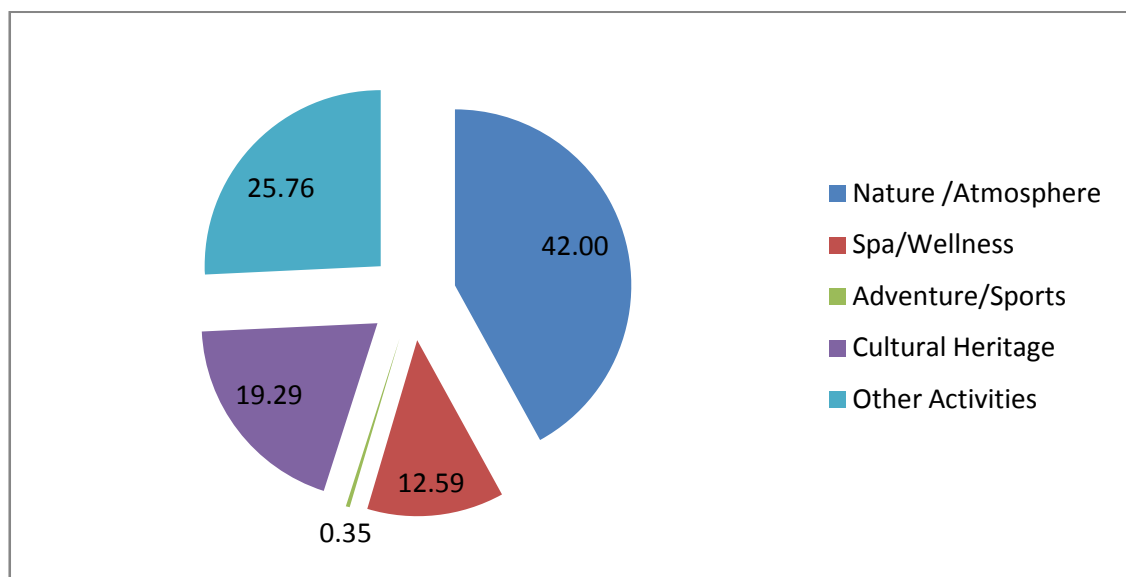


Figure 2.5.2. Distribution of the Tourist activities

The above content analysis research was undertaken in the regions which were highly visited by the Dutch tourists in 2017. The results show that people were highly involved in activities related to nature and atmosphere. However, spa and wellness seemed to be the least important activity. Daams and Veneri (2017) has mentioned that Netherlands being a small country has less natural attractive area than Germany, so this may be the reason that Dutch tourist likes be in the nature and involve themselves in nature related activities.

Some of the tourist reviews are cited below:

About nature and atmosphere: "We had a walk through this beautiful park, along the river. The leaves of the trees in autumn colors, the clear water providing mirrored images and the many water fountains had us in awe of the spectacular beauty of the park. Highly recommended". Another tourist responded "This place is just amazing: beauty along the way.... greenery in every corner.... love all over the place". Here visitor has expressed about the attractiveness of the nature and the surroundings, in the same another visitor have also expressed about the beauty of the nature visiting this region. People were interested in nature and indulging themselves in nature related activities and motivated by the nature attractiveness and landscapes.

In spa and wellness purpose visitor has expressed about the wellness services spas and saunas "An amazing Spa, so many different types of Baths and saunas a must do when in Baden-Baden. Some parts are Naked mandatory other parts are with bathing suit". Another visitor has also agreed in the same way was adding about the services and professionalism. People visiting this region were satisfied with the spa and wellness services. "If you do manage to get through to having a wellness procedure, the actual massages themselves are heavenly and very professional".

In the interest of adventure and sports people were involved in activities like sports and adventure and the other activities they performed visiting here, but both the visitors have included about the nature, here the motive was involving themselves in sports and adventure activities within the nature.

"We had an absolutely amazing time hiking to and along the chalk cliffs, and walking along the pier", said one respondent. Another one highlighted the diversity "Regardless of where you decide to park and walk around, there are castles, vineyards, boutiques, art displays, wineries and tastings, restaurants, bicycle rentals, trails for walks or trekking back country."

People who appreciated cultural heritage seems to enjoy the sightseeing, "Fantastic way to see castle after castle set in breathtaking scenery". They also want to know about the history and other activities, here people has mentioned about the nature, "If you love history, views, good wine, great people, different levels of activity and want a stress free holiday this is it".

Under other Activities people seems enjoying foods, shopping, cafes and restaurants but also expressed their gratitude towards the nature in the location they were visiting:"The hotel was within walking distance of the sea and many nice restaurants. Overall, this was such a beautiful place" and "The location couldn't have been better with a short walk to all of the main streets of Aachen with Shopping and cafes."

Here, stated above it can be said the people visiting these regions were highly motivated towards the nature. As Ardell (2010) stated that people are wise enough to make conscious choices and taking responsibilities for their own well-being. Most of the people who were involved in different activities were satisfied and mentioned about the natural attributed within that region.

The first two questions were about the demographic status, the respondents participated in this survey 55% were female and 45% were male out of 108 respondents. The respondents participated were from the age of 18years to 76years where the highest were from the age group 46-55 years with 33.33% and the lowest over 76 years of 2.77%, major number respondents were from Netherlands (Figure 2.5.3.)

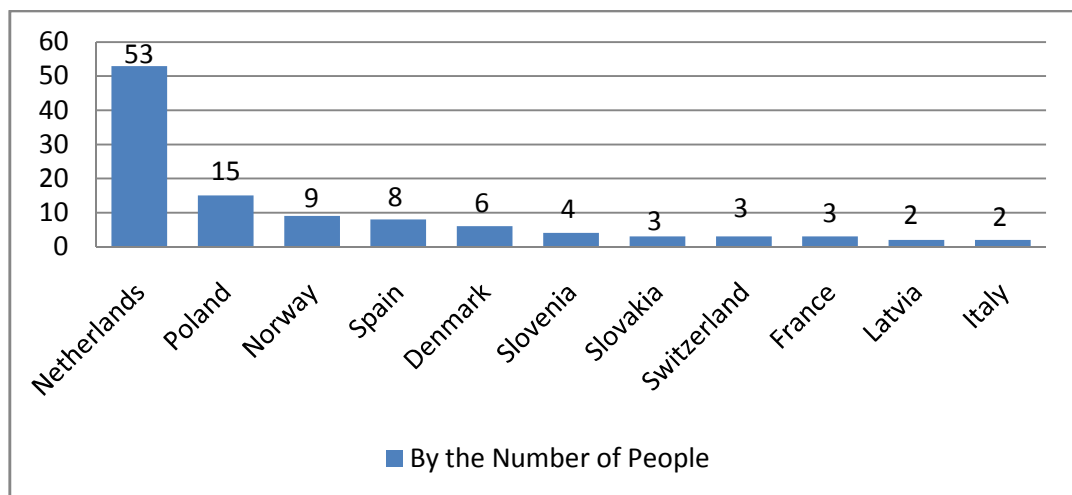


Figure 2.5.3.Country of the respondents

The number of people travelling to Germany, were more than 50% are the people travelling 53 out of 108 travelling from Netherlands. (GNTB Annual Report 2018,p. 29) Netherlands is the major source market for German tourism and the second highest people travelling to Germany are from Poland 15 out of 108 respondents. The survey

also shows that the people participated were all from the European countries, Global Wellness Institute (2014) stated that in 77% of wellness tourism accounts from the domestic tourists in the European region but in this survey all the respondents were from European region, this show that the destination is not so famous and not marketed in the other international markets which may be able to attract more visitor in the future.

Out of 108 respondents 37 were visiting first time Germany and the rest of respondents have been visiting Germany previously.51% of tourist has visited Germany two times in past, 39% has visited three times and 10% has visited more than three times. This shows tourists has been enjoying and returning to the Germany for wellness purpose.

30.6% of respondents stated that they used operators services where as 69.44% travelled by own self. In this case the majority of respondent visiting Germany are from Netherlands and another highest group is from Poland and the people visiting to Germany are travelling by own self is also high with the nearest travelling distance.

The online booking system has made possible travelling own self without depending on the agents or operators. The Europeans travelling first time to Germany had used tour operators to visit Germany. Tourist who has visited more than one time has travelled by own self, while tourist visiting the country first time has used agents to visit Germany. Ayyildiz and Turna (2013) has also mentioned that being Germany a neighboring country it is convenient to visit Germany from Netherlands, this can be applied to Poland and other countries also with nearest travelling distances travelling by their own.

The reason for tourists to visit Germany is highly associated with rest and relaxation (55% of respondents), sea side (44%) and sports and recreation (33%). (Figure 2.5.4.)

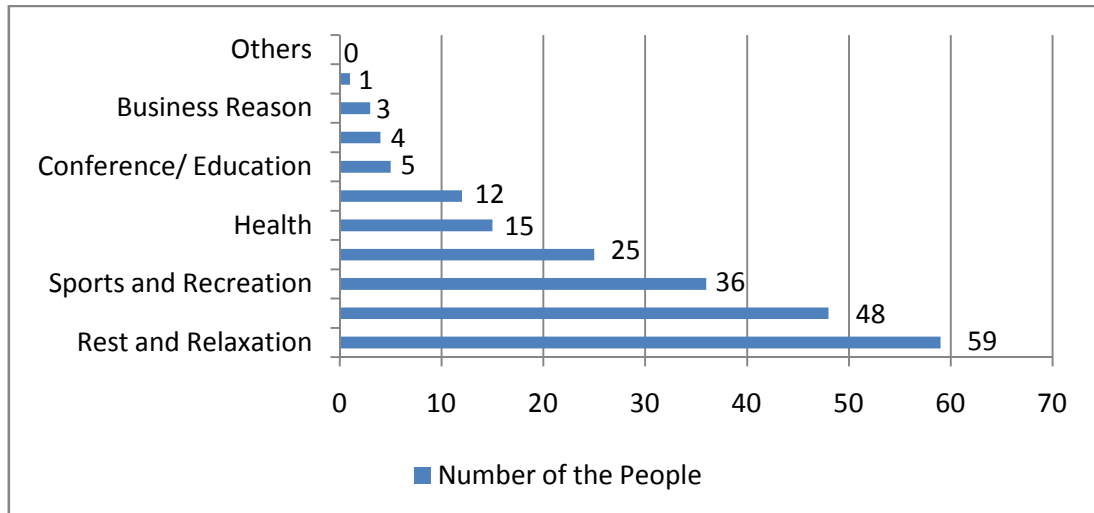


Figure 2.5.4. Reason for visiting Germany

The choices made for the visiting shows clear is being out in the nature and get relax from the daily routines. Pesonen et al.,(2011) mentioned that nature and enjoying nature was the most interested segment for the wellness tourists, while Kruizinga(2016) and Brooker and Joppe(2014) mentioned that in Netherlands visiting coastal area is most popular domestic holiday destination and Dutch people likes to visit coastal areas, which can be said that Dutch traveler are motivated by nature and nature related activities to visit Germany. Wilhelmshaven being a coastal destination the reason for visit was sea side, rest and relaxation in correspondence to that, Damijanac and Sergio (2013) concluded that motive of tourists visiting seaside resorts were relaxation and escape from everyday life. Beside the other preferred reasons were fun and health with 25 and 15 people respectively. The tourist travelling from nearby places to Germany are with the intention of having short breaks holidays near seaside, being relaxed and having fun.

Among these tourists twelve people were visiting their families, five for education purpose, four people for culture , three for business and one to enrich religious purpose to Germany.

The respondents has mentioned about liked and dislike factors, (Appendix 1).The most liked factor by the tourist visiting to Germany is climate and nature mentioning 32 times by the respondents mentioning about greenery, diverse nature, beautiful beach and seacoasts , favorable climate, warm weather and water. Nature and climate were the main motive to visit the destination. While there were six tourists mentioning about the

dislike were, about the beach and the parks saying "unmanaged beach" and "dirty parks".

Infrastructure was mentioned 18 times in liked and five times in disliked. They liked the hotels and facilities with the accommodation mentioning "fabulous accommodation and among the disliked mentioned was about the "old building" and "uncomfortable rooms". This can be taken as there was need of new establishment along with the good serving organizations. Dvorak et al.,(2014) named infrastructure as a part of destination development, planning and development of these secondary tourism services cooperation of all actors of development is required to make destination more competitive and motivating tourists to visit again and improving tourist experiences.

The second highest liked and dislike was about the staff and personals mentioning 24 and 16 time respectively. Respondent has liked 24 times about staff mentioning about friendly people and polite people, stating "liked the waiter". Disliked mentioned by the respondent were about the staffs not being cooperative, customer oriented and lack of English speaking staffs stating "arrogant", which means the tourist were not impressed with the staffs. Dvorak et al.,(2014) named staff plays vital roles in customer satisfaction and locals can create welcoming atmosphere for the tourists, trained and professional staffs and with professional skills can meet the customer satisfaction, customer oriented and hospital attitude of local are needed for tourism destination to succeed.

Spa and services are the factors most noticed in a wellness destination. Spa and services was mentioned several tourist has liked spa and services mentioning 20 times about the spa treatment, range of spa treatments, comfortable sauna and also included about the breakfast served in the hotel stating and also stating "professional services" in the spa facility. The respondent also felt that the spa services were not so luxurious and no proper spa packages were designed and mentioned four times about the dislikes stating "less beauty treatments". Dvorak et al.,(2014) stated customer choosing a health and wellness destination supporting services are the factor motivating the tourists. Voigt et al.,(2011) mentioned that wellness tourist to visit spas motivation was psychological transformation through indulgence and socialization. Nature and climate are core

products of wellness destination but there are other wellness tourist whose motivation visiting wellness destination are rather different.

Transport and location was mentioned six and two times both in likes and dislike respectively. Respondents mentioned about the cleanliness of transport services where they have been complaining about the dirty streets and also about disable friendly facilities. While respondents were also talking about the location being at walking distance to sea, good locations for family and friend to visit and they were disappointed about the market place closing very early.

Safety and price are the other factors that respondent had mentioned saying about the safe place to visit and were also concerned about the empty streets feeling insecure to be out in the evening. They were also not satisfied with price they were paying as unsatisfied with the quality for the money paid. Respondents has mention three and six times likes respectively for safety and price as of two and four times for dislike respectively. There was no mention for likes and dislikes 6 and 3 times respectively.

Ayyildiz and Turna(2013) stated that safety, accommodation, transportation, value for money creates a image of destination relating to the perception of people visiting the destination which makes a destination more competitive. So, it is necessary have good roads , proper transportation facility and must be able to feel safe for tourist while visiting a destination.

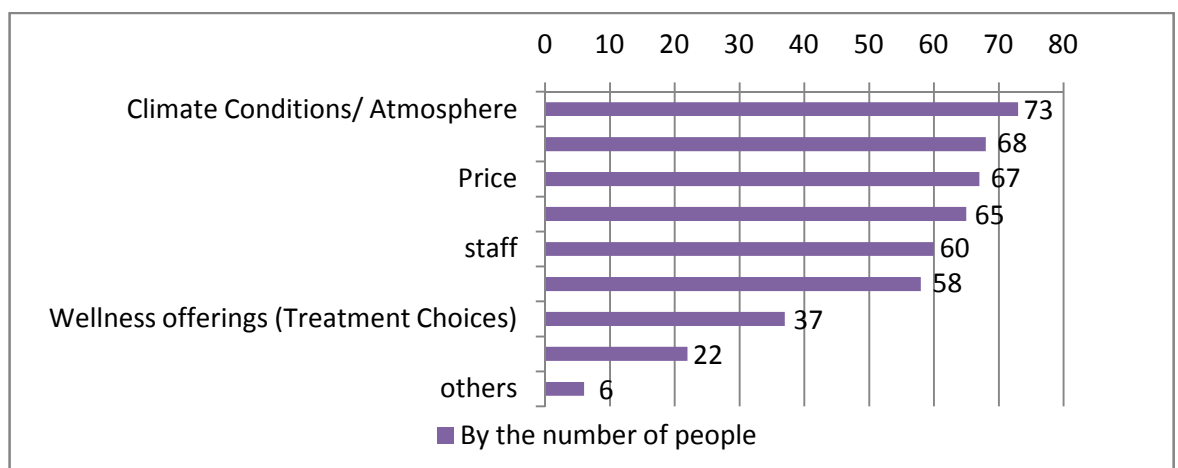


Figure 2.5.5.Important elements as a wellness destination

Among all the elements 73 number of people claimed that climate and atmospheric condition are the important elements in German's destination. Nature and price are the two elements which are stated important by the tourist visiting Germany which is 67 and 68 people respectively. The other elements that respondents consider important visiting wellness destination were accommodation, staffs, and quality of services which are followed by 65 people, 60 people and 58 people respectively. This also states that people were attracted to wellness site and been exploring to other wellness destinations.

Wellness offerings (treatment choices) were least considered by respondent to important elements selected by 37 peoples , gym , pools and others facilities were also considered as important element. The wellness tourist visiting a destination consider highly climate, nature and atmosphere, but other factors like wellness offerings and other facilities were considered low as 50% participants were Dutch tourists. According to Vork & Lombart (2013) these traveler think that spa and wellness and spa related services are unnecessary luxury.

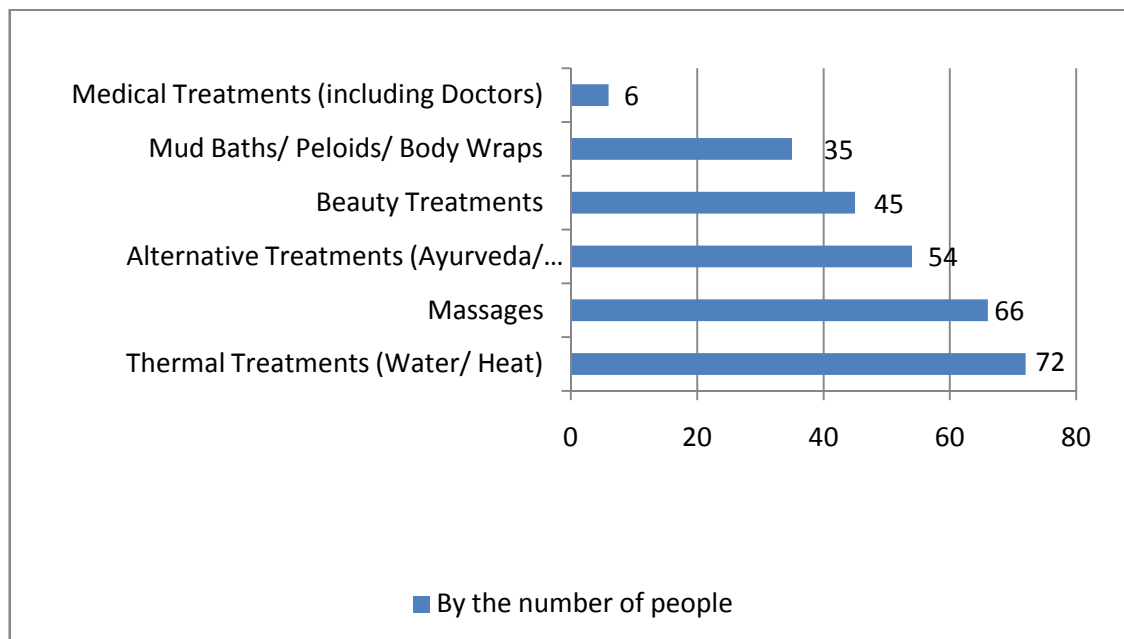


Figure 2.5.6. Treatment which were looking for in German Destination

The major treatment respondent looking for is the thermal treatment in which 72 people out of 108 precisely selected thermal spa therapies. Thermal treatment is well known and famous among the tourist having a historical past. Respondent has also shown keen

interest in the massages and the alternative treatment like (ayurveda and acupuncture) which were selected by 66 and 54 people respectively.

45 people selected beauty treatments which was mostly understood by the female participants and is more than 50% in the survey. 35 respondents chose mud baths/peloids/body wraps and six people selected medical treatments related to spa services

However, wellness tourist are motivated by the range of alternative treatments and services, here in this graph it shows the Dutch traveler are also interested in these services but hesitate to trying it, Vork and Lombart (2014) mentioned that there was no tradition and spa culture in Netherlands like Germany and Dutch people and effect of wellness received little attention.

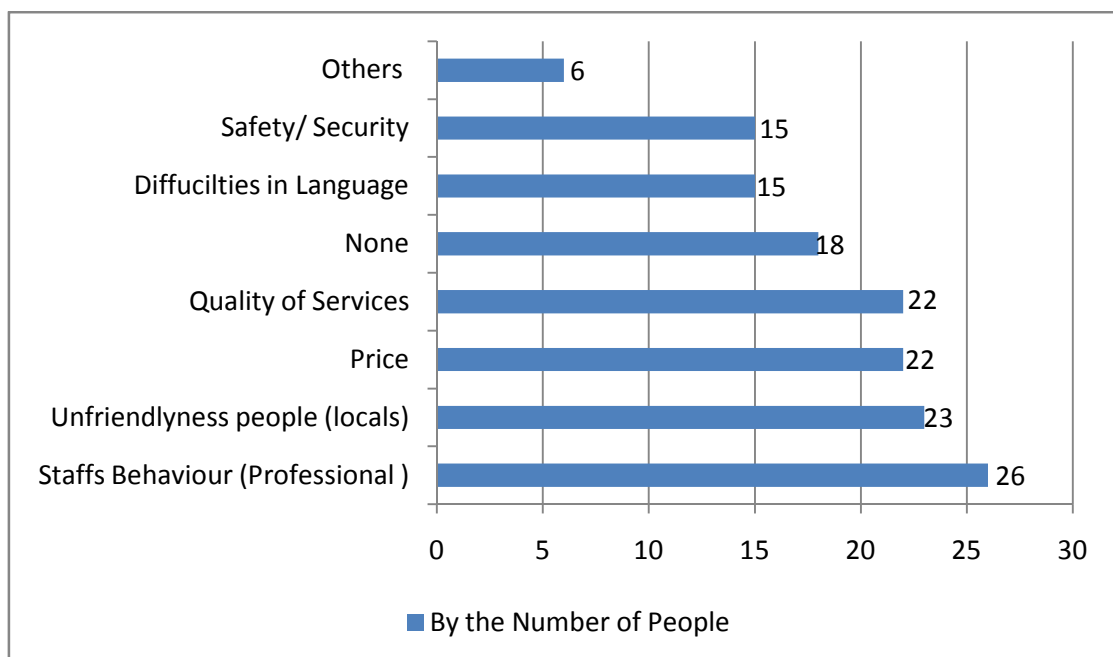


Figure 2.5.7. Problem faced during stay in Germany

26 out of 108 respondents were not pleased with the staff behavioral and attitude towards the customers and 23 people were not happy with the local people behaviors, 22 people named price and quality unsatisfactory respectively, other issues were language problem and safety named by 15 people and 18 people had no problem with any things. However the above factors plays important role for destination to more

competitive but price factor was one of the highly responded. According to Ayyildiz & Turna (2013) 40% of Dutch people works part time and has more time and less money to spend, price factor should be monitored and regulated as this may affect the motive of Dutch traveler to visit Germany again.

Only 57 people out of 108 responded to this question 63.16% people responded to take part in these activities while 36.84% denied to take part in these activities. Respondent between 26-35 and 36-45 may not interested to take part in these types of activities. The younger generations may be interest in other activities, sports, hiking and adventure therefore they tend to ignore activities like nutrition program, ayurveda and meditation.

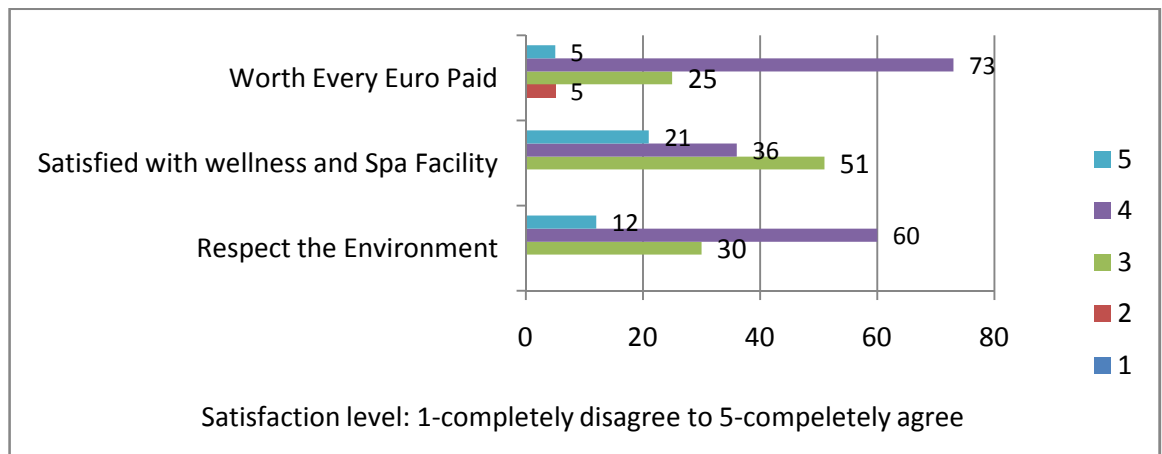


Figure 2.5.8. Respondents' agreement worth for money paid; satisfied with wellness and spa facility and respecting the environment.

Beside the negative opinion in previous question about people saying expensive everyone seems to satisfied with price paid.67% agreed and were satisfied with the price in the destination in which over 4% were highly satisfied with the price while 4.6% completely disagreed and were not satisfied with the price factor. 19% were highly satisfied with the spa and wellness facility, and about 47% were moderate about the wellness and spa facility. More than 11% were highly satisfied with the environment and 58% were only satisfied towards the nature and its conservation efforts. As mentioned above according German National Tourism Board, 2018 Germany markets itself as nature based tourism the above figure shows that the destination actually care about the nature.

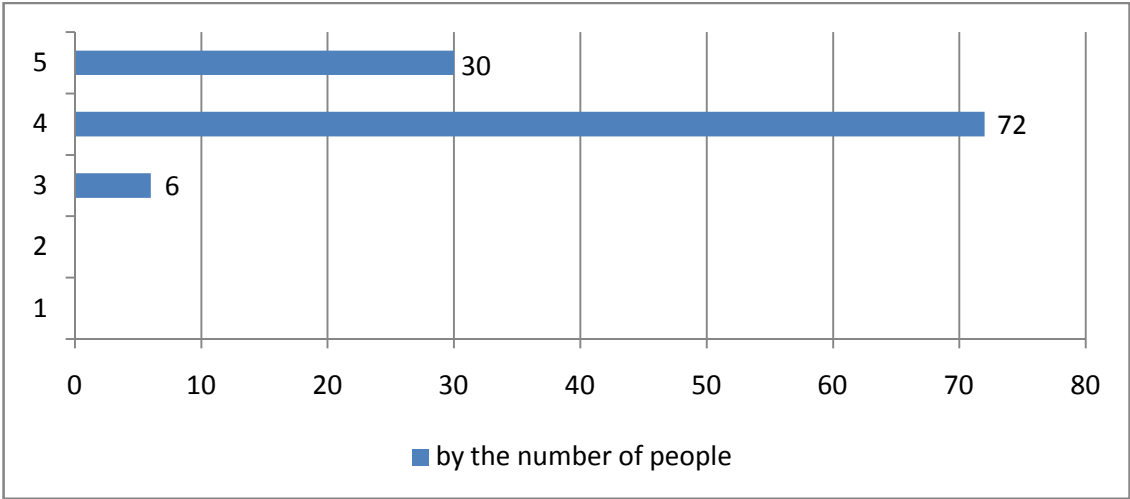


Figure 2.5.9. Respondents' satisfaction visiting Germany

30 people were highly satisfied with their visit to Germany, 75 people were satisfied and six people were not clear about their expectation towards the destination.

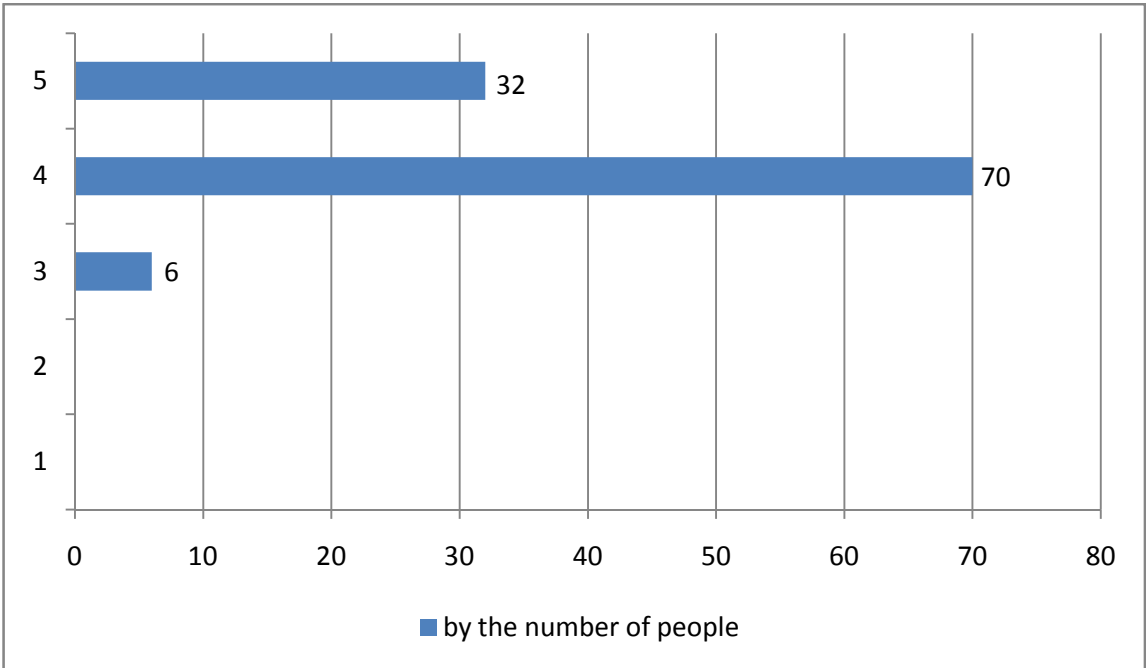


Figure 2.5.10. Respondents' talking about Germany with friends and colleagues

32 people will highly speak about the destination to other people and 70 people are also positive towards talking about the destination. tourist visiting to Germany were quite satisfied to talk about the destination.

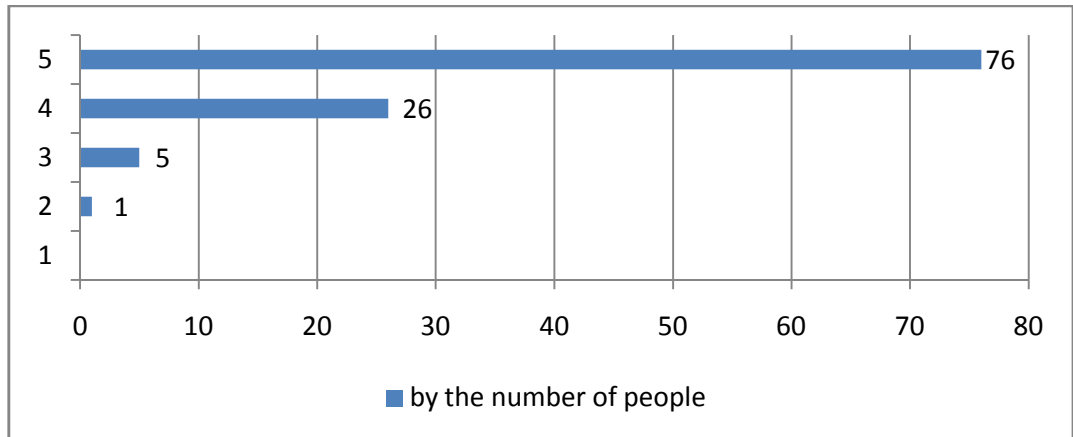


Figure 2.5.11. Desire to return again to Germany

The percentage of visiting more than once is high with in this survey, 76 people completely agreed to return to this destination 26 people also agreed to return back but five people were unknown about returning back and one responded not to return back.

The last question was about the recommendation for improvement of experience which is presented in table 2.5.2

Table 2.5.2 Recommendation for Improvement of experience

Factors	Recommendation	Number of Respondents
Services	"Spa services with beauty treatments", "Including English Channels, "Managed Beach", " Cleaned parks and street", "Luxurious products/Services" "Space for children", "Smoking zone" ,"Spa packages", "Meditation" "Authentic German food", "including other spa procedure "Spa packages with room bookings"	26
Personal	"Trained/ Professional staffs" , " Staff listening to Guest" "problem solving staffs", "polite", "English speaking"	18
Quality		10
Infrastructure	"Hotels in New buildings", "Working Elevator"	3
Safety	"Proper Lights in street"	3
Price	Reasonable prices	21
None	No mentions	32

26 people mentioned about the services to be improved "spa packages with room booking", space for children , luxurious product/services, authentic food, managed beach , clean parks and street, 18 tourist suggest improvement in staff and persons expecting to get good services, 18 people recommended improvement in quality of services, 21 people mentioned for reasonable price, three people mentioned about the infrastructure and safety while, 32 mention as they were happy did not recommend anything.

Here tourist has highly recommended about the services. Lack of proper services, infrastructure and qualified personals a destination cannot perform successfully and can bereason for tourist dissatisfaction and unmotivated to visit the destination next time. Jovicic(2016) has stated destinations as areas characterized with physical and human attributes that can satisfy needs of tourists.

According the research result Germany can be determined as wellness destination on the bases of its resource, facilities and infrastructure but still the small destination like Wilhelmshaven must be focused as many tourist are visiting this area for spending vacation and family time which can create a new market and provide opportunities to the people living in those region. On the bases of research and study of trip advisor reviews the reason for Dutch tourist to visit Germany is far beyond than being a neighboring country and convenient to visit, the study that Dutch tourist like to visit the other countries and to visit Germany they are motivated by the natural aspects, landscape and quality of services found within the Germany.

CONCLUSION

Germany as a wellness destination and motivation of Dutch traveler visiting Germany to meet the goal, delivering the result and providing recommendation the paper presented overview of Germany's wellness tourism its health system, wellness and spa resources along with the Germany's tourism statistic.

To present the Dutch traveler motivation, this paper has collected the thematic literature of Netherlands health care system, attitude of Dutch people towards the health and wellness along with different research based on Dutch tourist motivation.

The study included 108 participants from 11 different Nation, in which 50% were the from Netherlands and a content analysis was done through trip advisor review in the regions of Germany to get insight of the activates people engaged in, which were mostly visited by the Dutch people during 2017.

During the analysis of research the result shows that the tourist visiting Germany finds it as a competitive wellness tourism destination, the other fact is German tourism is focused only in the prime tourism location like Bavaria, Baden-Baden and other neglecting the small destination which has high potential of providing satisfactory services to tourists, in case of Wilhelmshaven a small coastal destination despite having wellness tourism resources, a in-depth research is required for the development and the management of the destination for market development and to attract more visitors to the destination.

Dutch tourist motivation to visit Germany was highly driven by the nature, landscapes and atmosphere. Despite of same natural settings like other European countries Dutch prefer to travel outside the country and enjoy the natural settings and climate of other countries. The study of trip advisor review also shows that the preferences of Dutch

traveler as a wellness tourist is different from other wellness tourist. Dutch people are motivated towards the natural attributes of Germany but hesitate to take part in other wellness services like (spas, massage and treatment). The survey in which 50% participants were Dutch people also reveals that the pull factors for visiting Germany were rest and relaxation, sea side, nature, health and fun while the pull factors Germany's landscape, nature and wellness and spa facilities and atmosphere.

Altogether the research shows the competitive advantage of Germany as a wellness destination is nature, climate, health resorts, safety and spa facilities and the motivation of Dutch tourist to visit Germany were landscape, nature, and atmosphere only very few were motivated by the spa facilities. As the competitive advantage of the destination and motivation of Dutch traveler matches and is identical in this research, destination is at the supplier side and Dutch travel motivation as a receiver side.

The problems area identified during the research were professionalism and education of staffs, service quality compared to the paid price, lack of luxury services, lack of research in the area of motivating of tourists, not specific focused in Netherlands as a wellness market.

Recommendations for German national tourism as below:

- Monitoring and controlling the nature and natural resources from exploitation of tourism growth, embracing the sustainable tourism method.
- Offering luxury services, combing the spa and wellness services with cultural packages.
- Training and educating the staffs providing professional services, providing and maintaining quality services using different tools for quality controlling and performance.
- Research and development of new and existing destination to attract new tourists and broadening the markets for new segment of tourism.
- Collaborating for efficient management and controlling changes in the market, developing new products, branding monitoring and evaluating the performance of the destination.

- Continuous monitoring external changes, economy and technology and involving the local and society.
- Developing and designing new spa and wellness services for Dutch traveler motivating them to be a part of spa and wellness facilities.
- Targeting the younger segment of Dutch tourist to set up trend for using the spa and wellness services for the development of future market.
- Marketing the Wellness tourism and making aware about the benefits of alternative treatment as prevention is better than cure in Dutch tourism markets.

The research met the aim of the study to analyze Germany's competitiveness as wellness destination and the motivations of Dutch tourist. However the following research may explore the competitiveness of Germany as wellness destination and the motivation of Dutch tourist visiting Germany this cannot be limited here, as Germany is very big country in-depth research is required, qualitative analysis for needs, motivation and behaviors of other segment of visitors is required to explore the motivations of tourist visiting Germany.

Overall this thesis focused on motivation of Dutch tourists and competitiveness of Germany as wellness destination the above stated recommendation may be useful in future for development and to attract more tourist to visit Germany.

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APPENDICES

APPENDIX 1: Liked and disliked factors

Categories	Liked	Mentioned	Disliked	Mentioned
Nature/ Climate	"Diverse in Nature", "Greenery", "Goods Parks", "Beautiful Beaches" "Warm Summers", "Warm water" "Beautiful" "Warm Summers", "Warm water" "Beautiful"	32	Unmanaged Beach, Dirty parks,	6
Infrastructu re	"Good Hotels" , "fabulous accommodation" "Good facilities within the accommodation"	18	"Uncomfortable rooms", "Very old Buildings"	5
Staffs/ Personals	"Very Friendly" , "Polite", "Liked the waiter"	24	"Arrogant" "does not speak English only German" "Not Cooperative", "Ignoring the customers"	16
Services/H otel/ Spa	"Goods Treatments" Professional Service" "Range of spa treatments", "Breakfast was- Fabulous", "Small but comfortable Sauna"	20	"not luxurious", "less beauty treatments", "no proper spa packages", " No English Channels"	4
Transport	"Public buses always in time" "Clean trains", "Bicycle lane made easy"	6	"Dirty Streets", "Must be thoughtful towards disables"	2

Location	"Near to Sea", "Walking Distance to the Beach" "Market area very Close", " Hookseil very-good location to be with family"	6	"Market closes very early"	2
Safety	"Safe place"	3	" Empty streets in the Evenings"	2
Price	"affordable prices" ," 10 Euros lunch pretty good-	6	"Expensive" , "no quality of price paid"	4
Did Not mention		6		3

APPENDIX 2 - Survey questions

Dear Sir/madam,

I will please if you will participate in a survey, this survey is for my studies this survey will take only 10-15 minutes of you precious time.

1. Gender: Male Female

2. Date of Birth: _____

3. Country : _____

4. Is this your first visit to Germany ?

Yes

No

5. How many times have you visited in past ? _____

6. Did you use any tour operator/Agent or you travelled by own self? (Mark an appropriate)

Tour Operator/ Agent Travelled by Self

7. What are the reasons for your visit to Germany? (Mark one or Several)

- Rest and Relaxation
- Sea Side
- Sports and Recreation
- Fun
- Health
- Visiting relatives
- Conference/ Education
- Business Reasons
- Religious

- Others

8. Please mention the factors you liked and disliked Germany as a Wellness destination.
(Write shortly your views)

9. Choose the listed below elements which you consider Important while visiting Germany as a wellness destination. (Select one or Several)

- Unspoiled Nature
- Climate Conditions/ Atmosphere
- Accommodation (Hotels, Rooms, Apartment)
- Wellness Offerings (Treatment Choices)
- Quality of Service
- Staffs
- Facilities
- Price
- Others

10. What treatment are you mostly looking for in German Resort and Spa? (Mark one or several)

- Thermal Treatments (Water/Heat)
- Massages
- Mud Baths/ Peloids/ Body Wraps
- Alternative Treatments (Ayurveda/ Acupuncture)
- Beauty Treatments
- Medical Treatments (Including Doctors)

11. What were the problem faced during your stay in Germany? (Select any one or several)

- Quality of Services
- Difficulties in Languages
- Price
- Staff Behaviors (Professional)
- Unfriendly people (Locals)

- Safety/ Security
- Others
- None

12. Would you take part in the alternative treatments or services in the German Wellness and Spa? (like: Ayurveda, Nutrition program, Meditation) Mark appropriate answer

Yes No

13. Below are the listed statements (for each statement please indicate to what extent do you agree) 1 = completely disagree 5 = Completely agree

- This destination respects the environment

1	2	3	4	5
---	---	---	---	---

- I am satisfied with wellness and Spa facility

1	2	3	4	5
---	---	---	---	---

- Staying at this destination is worth every Euro Paid.

1	2	3	4	5
---	---	---	---	---

14. Below are the Listed statements of this Wellness destination (For each statement please indicate to what extent do you agree) 1 = completely disagree 5 = Completely agree

- I am overall satisfied with visit to Germany.

1	2	3	4	5
---	---	---	---	---

- I will highly talk about this destination.

1	2	3	4	5
---	---	---	---	---

- I will return to this destination.

1	2	3	4	5
---	---	---	---	---

15. What factors would you recommend to improve your experience in Germany? (Write Short answers)

RESÜMEE

SAKSAMAA KUI HEAOLU RIIGI SIHTKOHT: HOLLANDIST PÄRIT REISJA SEISUKOHAST

Anup Khanal

Saksamaal on tervise ja heoluga pikk ajalooline seos, ulatudes Rooma aegadesse. Saksamaa on üks peamised Euroopas asuvaid sihtkohti ja riiki külastatakse just selle looduslike ressursside, vaadete, ja spa teenuste pärast. Holland on ressursside pakkuja Saksamaale ja hollandlased külastavad Saksamaad just puhkuse ja vaba aja veetmise eesmärgil. Selleks, et hollandlased Saksamaad spa teenuste kasutamise eesmärgil edasi külastaks, on oluline, et konkurentsi võimelised firmad seaksid klientide soovid, motivatsiooni ja käitumistavad esiplaanile. Kõiki neid aspekte peab uurima ja analüüsima, et tulevikus teenuseid parandada.

See uuring annab Saksamaa tervise ja heolu kohta ülevaate, keskendub sellele, miks hollandlased riiki külastavad ja kui võimekad on Saksamaa tervise ja heolu teenusepakkujad.

Uurimis meetoditeks oli teoreetiline analüüs ja küsitlus. Uurimus koosneb kahest osast, esimene neist annab teoreetilise ülevaate tervise ja heoluga seotud teemadest, turismi sihtkohtadest ja turistide motivatsioonist. Teine osa räägib Saksamaa seostest tervise ja heoluga, Euroopas asuvatest saksa päritoluga firmadest ja uurimusest koos tulemuste ning aruteluga.

Tulemused näitavad: „Saksamaa on heolu sihtkohanakompetentne. Hollandlased valivad Saksamaa sihtkohaks selle tervise ja heoluga seotud teenuste pärast.“ Võttes selle magistri uuringu aluseks, saab öelda, et jälgides ja arendades väikeseid sihtkohti, saab Saksamaa tervisega seotud turismi veelgi konkurentsivõimelisemaks muuta, hollandlased kes Saksamaad külastavad on mõjutatud looduslike ressursside, vaadete ja

turismiteenuste poolest. See uuring pakub informatsiooni Saksamaa, kui heaolu riigi sihtkoha kohta, selgitusi hollandlaste käitumismustrite ja valiku eelistuste kohta, mis annavad turule võimaluse aru saada ja arendada strateegiaid uue turu loomiseks

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