

Soaking Up History Steaming into the Hot Springs (R)Evolution



Amy McDonald Chair of Global Hot Springs Initiative Global Wellness Institute CEO, Under a Tree



Mark Hennebry

Vice Chair of Global Hot Springs Initiative Global Wellness Institute

Board of Director Danubius Hotel Group, UK



David Clay Large

Senior Fellow Institute of European Studies UC Berkley, U.S.

Historical Perspective





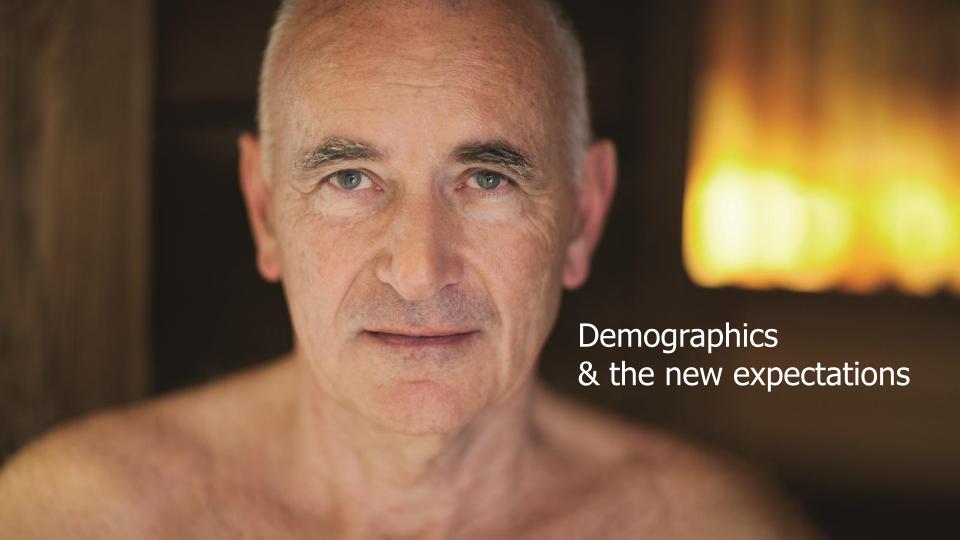
Getting Naked at the Friedrichsbad





Tom J. Bauer COO, VAMED Vitality World, Austria

European Perspective













Charles Davidson

CEO & Co-Founder Peninsula Hot Springs, Australia

Australian Perspective



Victorian Hot Springs Development Potential

Three styles of hot springs under development or planned development:

- (1) Hot Springs Relaxation and Wellbeing Industry: Tourism
- (2) Thermal Rehabilitation Health Centers Industry: Health / Medical
- (3) Thermal Water Parks
 Industry: Entertainment / Tourism

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Thermal Rehabilitation

Thermal



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Relaxation Hot Spring

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WARRNAMBOOL

PETERBOROUGH

PORT CAMPBELL

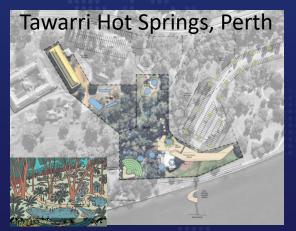
BELLARINE PENINSULA MORNINGTON PENINSULA

PHILLIP ISLAND

Australian Planned Hot Spring Developments















Tominori Maruyama (Maru)

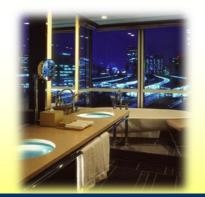
Chief Research Consultant & Manager Mitsui Knowledge Industry Co., Ltd. Japan

Japanese Perspective

Variety of Onsen Facility

Ryokan





Hotel

Club Resort





Pension / Inn





Day-Visit Onsen

Market Size of Onsen Related Industry (Japan)

Annual Turnover (billion yen)		
2011	2014	Growth Rate
1,425	1,420	-0.4%
949	1,201	26.6%
264	314	18.9%
73	75	2.7%
2,711 (\$ 27 billion)	3,010 (\$ 30 billion)	11.0%
	2011 1,425 949 264 73 2,711	2011 2014 1,425 1,420 949 1,201 264 314 73 75 2,711 3,010

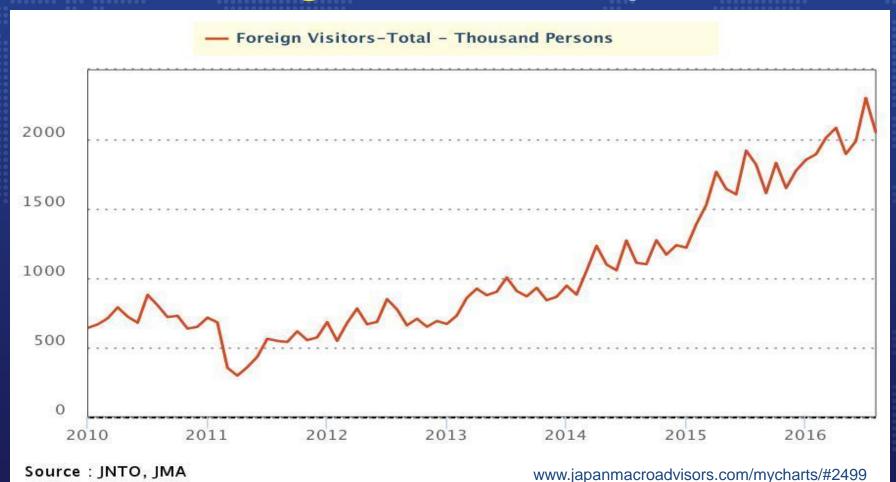
Source: White Paper of Leisure 2015, Japan Productivity Center

Types of Business	Annual Turnover (2011)
Day-visit Onsen (Public bath without accommodation)	400 billion yen (\$ 4 billion)

Source: http://careerconnection.jp/biz/studycom/content_714.html

About 36% of them uses Onsen

Foreign Visitors to Japan



Challenges and Efforts by the Japanese Government

- Ministry of Environment (MOE) to promote wellness tourism with new brand values for national parks
- Expect 2 or 3-fold increase in tourism by the Tokyo Olympics in 2020

Examples of Therapeutic Onsens

Source: http://www.yadyad.com/en/onsen/effect

Source: http://www.jph-ri.or.jp/

Simple Spring: Minakami Onsen

Effects:

General ailments such as

- neuralgia,
- muscle/joint pain,
- bruises, sprains,
- sensitivity to cold,
- relief from fatigue,
- overall health promotion, etc.



Temperature:40-45°C

Elements:

Elements differ from onsen to onsen. Low mineral and gas content.

Sulphur Spring: Kusatsu Onsen

Effects:

- acne, oily skin,
- dermatitis, rheumatism,
- asthma,
- gynaecological disorders, etc.

Temperature:50-96°C

Elements:

Contains high levels of sulphur or hydrogen sulphide.

Chloride Spring: Arima Onsen

Effects:

- External wounds,
- chronic dermatitis,
- bruises, sprains,
- chronic rheumatism,
- infertility, gout,
- vascular sclerosis, etc.



Temperature:90°C

Elements:

Contains salts, in particular high levels of common salt. Over 1,000mg of dissolved element per 1kg of onsen of which the main element of anions is chloride ions.

Radioactive Spring: Murasugi Onsen

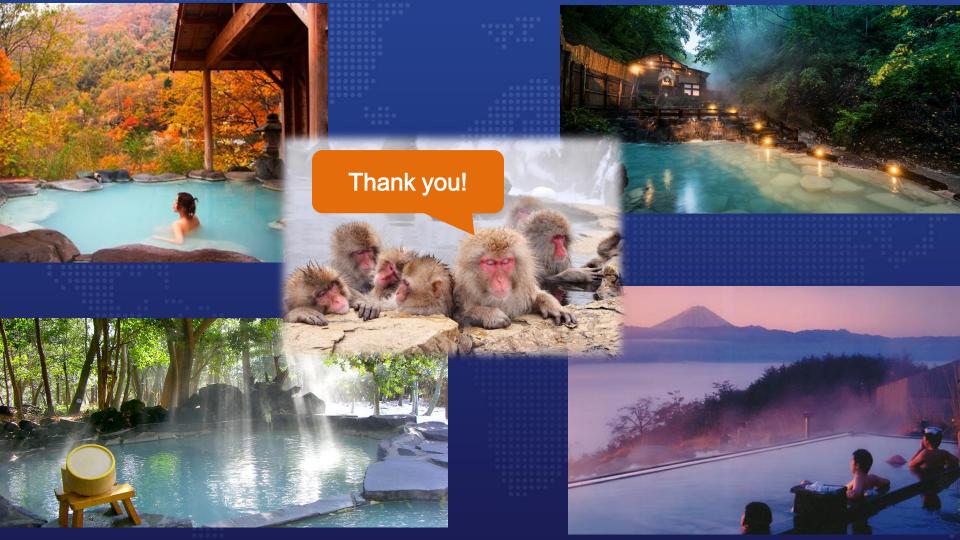
Effects:

- dermatosis,
- gynaecological disorders,
- external wounds, etc.
- · Believed to be particularly effective on gout, lowering blood pressure and circulatory disorders.



Temperature:26°C

Contains radioisotopes created by nuclear decay of tiny amounts of substances ranging from radium, radon and astatine to mercury.



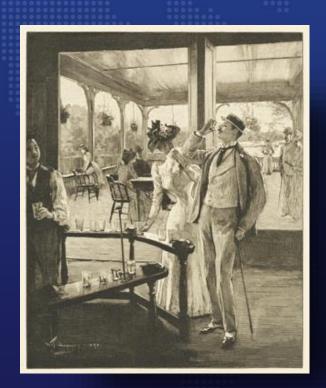


Wendi Gelfound

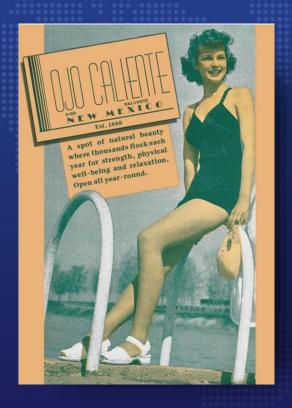
Director of Marketing
Ojo Caliente Mineral Springs Resort & Spa, U.S.

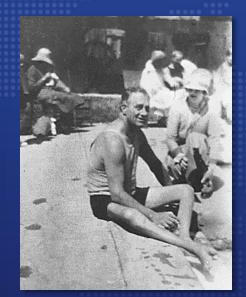
American Perspective

Historical Perspective of U.S. Hot Springs & Water Cure Towns

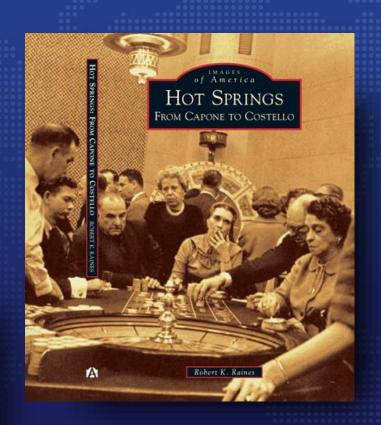












What's Old is New Again



2015 By The Numbers

U.S. Thermal/Mineral Springs

217

U.S.
Thermal/Mineral
SPRINGS REVENUE
\$488 million

U.S. Thermal/Mineral Springs with SPA

106

U.S.
Thermal/Mineral
SPRINGS SPA
REVENUE
\$327 million



Expansion is **HOT**































How many people visit Austrian thermal spas annually?

(a) 3.1M

(b) 5.6M

(c) 9.4M

Answer: (c) 9.4M

What Central European spa is associated with Ludwig van Beethoven?

Answer:

Baden-Bei-Wien

What German spa pioneered the development of casino gambling?

Answer:

Baden-Baden

Which country is famous for its Blue Lagoon Geothermal Spa?

Answer: Iceland

What is the name of the famous geyser in Yellowstone National Park in the U.S.?

Answer: Old Faithful

How many hot springs are in the U.S.?

(a) 500 (b) 217 (c) 1100

Answer: (b) 217

Koshu Nishiyama Hot Spring in Japan holds the world record for what?

Answer:

Oldest Hot Spring Hotel (1,300 years old)

Where is the largest thermal lake in Europe?

Answer:

Heviz, Hungary

What is the German word for Spa?

Answer: Bad

What are the health benefits of soaking in Lithia mineral water?

(a) improve arthritis(b) detoxifying(c) supports nervous system, mood and sleep

Answer:

(c) supports nervous system, mood and sleep

How many thermal/mineral springs exist on our planet?

Answer:

There are nearly 27,000 thermal/mineral springs in more than 103 countries ... generating more than 45 Billion Euro annually.

More than 20,000 do not offer spa-related treatments.

Which European city is known as the City of Spas for its plentiful hot springs?

Answer: Budapest

Which U.S. hot springs spa will be 150 years old in 2018?

Answer:

Ojo Caliente Mineral Springs

Which hot springs won the World Luxury Spa Award in 2016?

Answer:

Peninsula Hot Springs

Where is the largest thermal lake in the world?

Answer:

Waimungu Thermal Valley, New Zealand

Where is the southernmost hot springs located in the world?

Answer: Antarctical

Which Onsen has been awarded "3-Stars" by Michelin?

Answer:

Hyotan Onsen at Beppu in Japan

What kind of hot spring gas is lighter than air?

Answer: Hydrogen Gas

How many degrees are required for a fountainhead to be registered as an Onsen in Japan?

Answer:

25 Celsius (77 Fahrenheit)

Why Do Some Hot Springs Smell?

Answer:

Some geothermal mineral waters contain ingredients with strong odors such as hydrogen sulfide gas which smells similar to rotten eggs.

