THERMAL SPAS IN EUROPE
Thermal/Mineral Springs by Region, 2013
Number of thermal/mineral springs establishments and revenues

North America
$0.5b Revenues

Europe
$21.7b Revenues
5,035 Estab.

Asia-Pacific
$26.7b Revenues

Latin America
$0.9b Revenues

Sub-Saharan Africa
$0.2b Revenues

Middle East & N. Africa
20,298 Estab.

315 Estab.

35 Estab.

961 Estab.

203 Estab.
## Top Twenty-Five Thermal/Mineral Springs Markets, 2013

<table>
<thead>
<tr>
<th>Number of Establishments</th>
<th>Revenues (US$ billions)</th>
<th>Rank in 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>2,160</td>
<td>$14,078.3</td>
</tr>
<tr>
<td>Japan</td>
<td>17,653</td>
<td>$11,687.0</td>
</tr>
<tr>
<td>Germany</td>
<td>1,265</td>
<td>$7,520.0</td>
</tr>
<tr>
<td>Russia</td>
<td>776</td>
<td>$3,688.5</td>
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<tr>
<td>Italy</td>
<td>756</td>
<td>$1,742.7</td>
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<tr>
<td>Austria</td>
<td>124</td>
<td>$928.8</td>
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<tr>
<td>Turkey</td>
<td>196</td>
<td>$862.4</td>
</tr>
<tr>
<td>Hungary</td>
<td>531</td>
<td>$691.3</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>84</td>
<td>$686.4</td>
</tr>
<tr>
<td>Spain</td>
<td>165</td>
<td>$672.0</td>
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<tr>
<td>France</td>
<td>175</td>
<td>$665.5</td>
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<tr>
<td>Poland</td>
<td>72</td>
<td>$576.0</td>
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<tr>
<td>Switzerland</td>
<td>61</td>
<td>$485.8</td>
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<tr>
<td>Slovenia</td>
<td>63</td>
<td>$439.2</td>
</tr>
<tr>
<td>United States</td>
<td>185</td>
<td>$395.0</td>
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<tr>
<td>Portugal</td>
<td>84</td>
<td>$376.2</td>
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<tr>
<td>Slovakia</td>
<td>81</td>
<td>$364.8</td>
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<tr>
<td>Taiwan</td>
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<td>$307.5</td>
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<tr>
<td>Romania</td>
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<td>$295.0</td>
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<tr>
<td>Iceland</td>
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<td>$293.0</td>
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<tr>
<td>South Korea</td>
<td>96</td>
<td>$283.4</td>
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<tr>
<td>New Zealand</td>
<td>96</td>
<td>$255.0</td>
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<tr>
<td>Brazil</td>
<td>52</td>
<td>$230.0</td>
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<tr>
<td>Mexico</td>
<td>576</td>
<td>$225.0</td>
</tr>
<tr>
<td>Serbia</td>
<td>58</td>
<td>$188.0</td>
</tr>
</tbody>
</table>
HYDROPATHY;
OR
THE COLD WATER CURE,
AS PRACTICED BY
VINCENT PRIEßNITZ,
OF GRAFENBERG, SILESIA, AUSTRIA.

BY
CAPT. R. T. CLARIDGE, F.S.A.,
Author of the "Wanderings in Egypt," etc.

FIFTH EDITION.

LONDON:
JAMES MADDE
S. RABINOWITZ
MINTCRAFT
European Thermal Spas

- Tradition of healing
- Medical
- Natural Resources
Traditional Spa Stay
Availability: 4 January 2016 - 14 January 2017

This spa stay is intended for the treatment of rheumatoid arthritis and the musculoskeletal system, with a recommended stay of 2 - 3 weeks.

- **Accommodation with full board** (min. 7 nights) - buffet breakfast, lunch, dinner; special diet in case of osteoporosis treatment
- **Doctor and health examinations** (initial and final) with a special emphasis on disorders of the musculoskeletal system and related complications
  - Doctor's visit - once per week
  - Diagnostics and laboratory tests with doctor’s prescription - for stay with a minimum duration 13 nights
  - Medical report at the end of the stay
  - Healing treatments: individual therapeutic program (7 nights), based on the guest’s health and doctor’s prescription. The programme includes 4 active rehabilitation treatments per week, such as group exercises or fitness training with a fitness trainer

« Back to the list of offers
THE COMBINATION EFFECT!

Healthy environment

Healthy diet

Heat packs

Rehab Massage

Electrotherapy

Physiotherapy

Inhalation

Doctor

Hydrotherapy

Relaxing in hot water

3 - 4 treatments a day
...integrated with Wellness
...thermal spa / sanitoriums
BAD TATZMANNSDORF
Public Day Spas
thermal spas neglected
market diversification

- Seniors (traditional), Seniors (active)
- ‘Wellness weekenders’
- Families
- Domestic, neighbouring countries, Russian, Middle East
Product diversification

- Larger water areas
- More sauna experiences
- Massage varieties
- More modern medical treatment methods
- Detox and weight loss programs
Challenges…

• Clinical trials backing the thermal water effects
• Giving reasons for people to visit for ‘prevention’ purposes
• Oversupply of hot springs
Opportunities…

- Aging population
- A more ‘health focused’ population
- The trend for ‘natural’ treatments
- Investment possibilities for rundown spa resorts
THANK YOU FOR YOUR ATTENTION!