

European Update



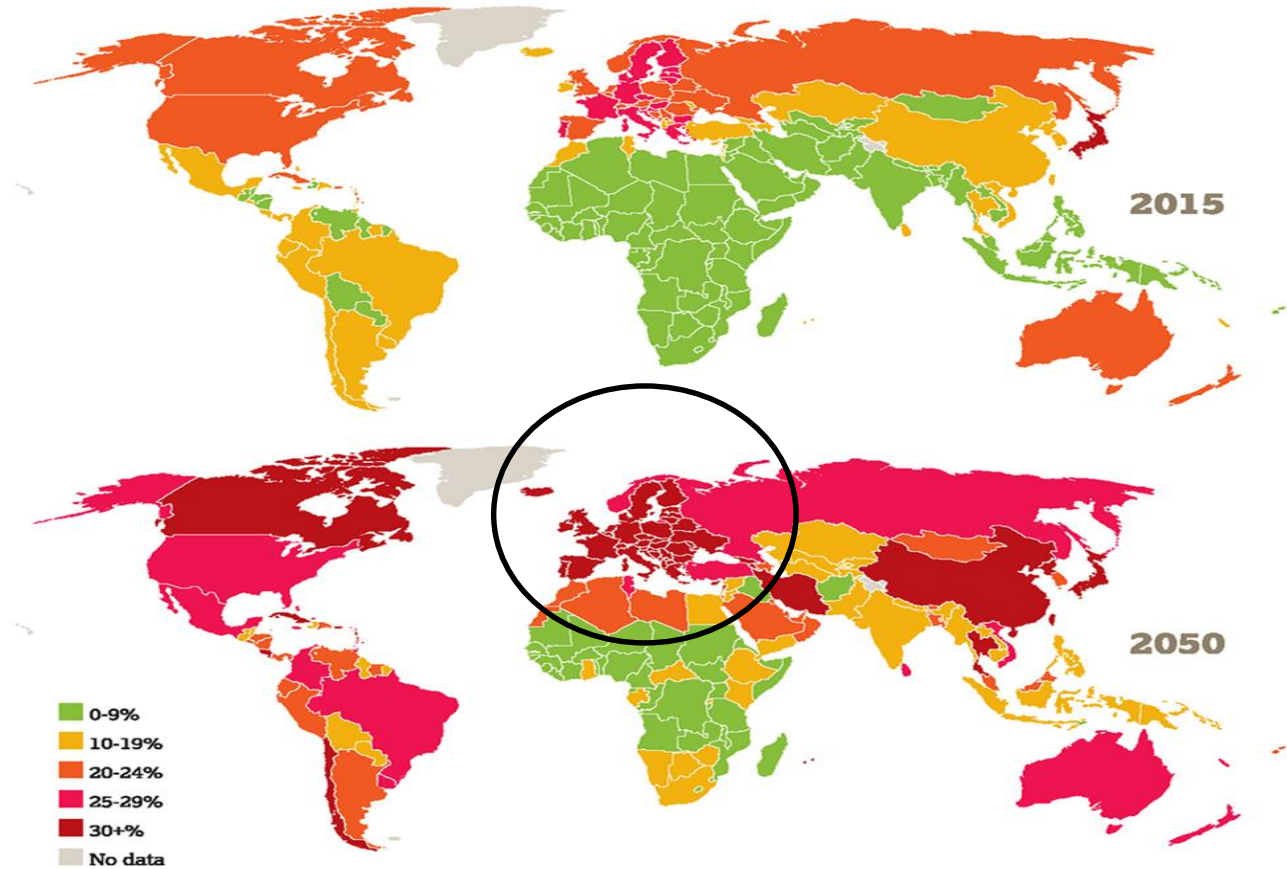
Thermal/Mineral Springs by Region, 2015

Number of thermal/mineral springs establishments and revenues



Source: Global Wellness Institute

UN data + 60 years old





Thermal Trends

- Life expectancy vs Health expectancy
- Increasing consumer interest
- Obesity – over 50% of EU overweight
- Healthy behaviour to reduce medical costs

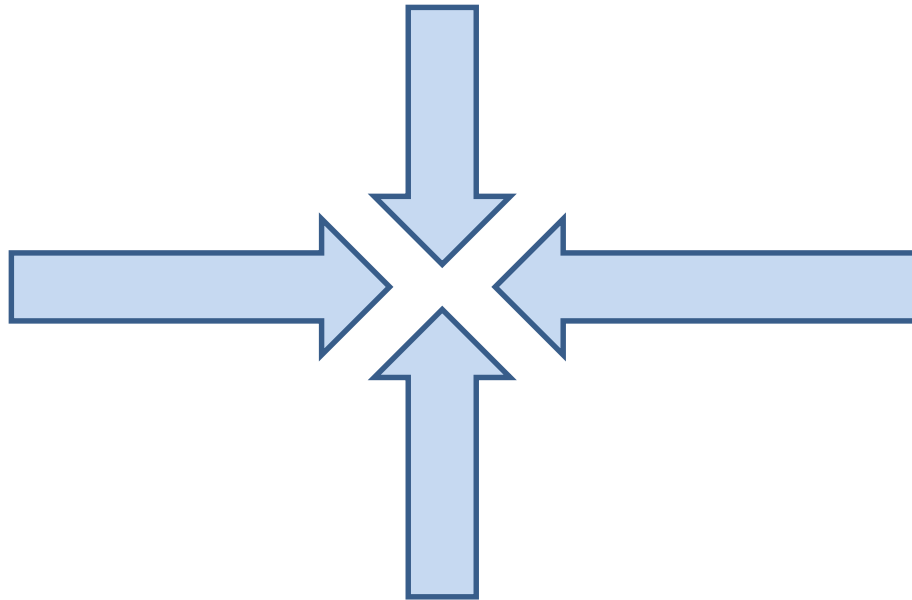
Convergence

Conventional Treatment

Wellness

Medical check
ups and
diagnosis

Balneotherapy & alternative therapies



Balneotherapy

Total or partial funding

Italy, Czech,
Lithuania, Latvia,
France, Lux,
Poland, Romania,
Germany,
Slovakia, Austria,
Switzerland

Partial funding

Hungary, Iceland,
Portugal

No funding

Estonia, Bulgaria
Denmark, Spain
Netherlands,
Scandinavia
UK

Thermal Spas - trends

Traditional thermal 'Kur' spas

Integrating prevention/wellness

Choices that convey meaning and purpose

Balneotherapy rehabilitation - expansion

Beauty & pampering

Detox, weight loss

Wellness staycations

