European Update
Thermal/Mineral Springs by Region, 2015
Number of thermal/mineral springs establishments and revenues

North America
$0.6b Revenues
237 Establishments

Europe
$19.7b Revenues
5,612 Establishments

Asia-Pacific
$29.2b Revenues
20,146 Establishments

Latin America
$1.2b Revenues
1,148 Establishments

Sub-Saharan Africa
$0.06b Revenues
324 Establishments

Middle East-N. Africa
$0.2b Revenues
39 Establishments

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

Balneotherapy & alternative therapies

Medical check ups and diagnosis
## Balneotherapy

<table>
<thead>
<tr>
<th>Total or partial funding</th>
<th>Partial funding</th>
<th>No funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy, Czech, Lithuania, Latvia, France, Lux, Poland, Romania, Germany, Slovakia, Austria, Switzerland</td>
<td>Hungary, Iceland, Portugal</td>
<td>Estonia, Bulgaria, Denmark, Spain, Netherlands, Scandinavia, UK</td>
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</tbody>
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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