World Spa & Wellness Asia Convention

The Rise of Hot Springs

13-14 May, 2019

Presenter
Charles Davidson
Our Story – the beginning
We are water - water makes up 99% of our molecules
GLOBAL WELLNESS INSTITUTE™
EMPOWERING WELLNESS WORLDWIDE

FIVE PILLARS

- Initiatives
- Roundtables
- Wellness Evidence
- Wellness Moonshot
- Research
24 INITIATIVES

Africa Wellness
Beauty Meets Wellness
Consulting Best Practices
Digital Wellness
Eastern European
Exploring Salt & Halotherapy
First 1000 Days
Healthy Aging
**Hot Springs**
Hydrothermal
Immersion
Massage Makes Me Happy

Mental Wellness
Peer to Peer Leadership Training
Social Impact
Sound Healing
Sustainability
Wellness Architecture
Wellness at Work
Wellness for Cancer
Wellness for Children
Wellness Tourism
Women in Leadership

https://globalwellnessinstitute.org/

https://www.globalwellnesssummit.com/
GLOBAL WELLNESS ECONOMY: $4.2 trillion in 2017

Wellness Tourism $639b

- Personal Care, Beauty & Anti-Aging $1,083b
- Traditional & Complementary Medicine $360b
- Wellness Real Estate $134b
- Preventive & Personalized Medicine and Public Health $575b
- Workplace Wellness $48b
- Healthy Eating, Nutrition & Weight Loss $702b
- Fitness & Mind-Body $595b
- Thermal/Mineral Springs $56b
- Spa Economy $119b
GWI defined wellness tourism as travel associated with the pursuit of maintaining or enhancing one’s personal wellbeing.

There are 34,057 thermal/mineral springs establishments operating in 127 countries.

https://globalwellnessinstitute.org/initiatives/hot-springs-initiative/
# Thermal/Mineral Springs Facilities and Revenues by Region, 2015 and 2017

<table>
<thead>
<tr>
<th></th>
<th>Number of Establishments</th>
<th>Revenues (US$ billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2015</td>
<td>2017</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>20,146</td>
<td>25,916</td>
</tr>
<tr>
<td>Europe</td>
<td>5,613</td>
<td>5,967</td>
</tr>
<tr>
<td>Latin America-Caribbean</td>
<td>1,148</td>
<td>1,406</td>
</tr>
<tr>
<td>North America</td>
<td>237</td>
<td>302</td>
</tr>
<tr>
<td>Middle East-North Africa</td>
<td>324</td>
<td>416</td>
</tr>
<tr>
<td>Sub-Saharan Africa</td>
<td>39</td>
<td>50</td>
</tr>
<tr>
<td><strong>Total Thermal/Mineral Springs Industry</strong></td>
<td><strong>27,507</strong></td>
<td><strong>34,057</strong></td>
</tr>
</tbody>
</table>

Note: The thermal/mineral springs revenue estimates include all revenues earned by these establishments, from bathing/swimming offerings, spa/wellness services and other treatments, other recreational activities, food & beverage, lodging, and other services.

Revenue figures may not sum to total due to rounding. *See text below for notes on establishment growth.

Source: Global Wellness Institute
## Top Twenty Thermal/Mineral Springs Markets, 2017

<table>
<thead>
<tr>
<th></th>
<th>Number of Establishments</th>
<th>Revenues (US$ billions)</th>
<th>Rank in 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>3,900</td>
<td>$17,501.1</td>
<td>1</td>
</tr>
<tr>
<td>Japan</td>
<td>20,972</td>
<td>$12,795.5</td>
<td>2</td>
</tr>
<tr>
<td>Germany</td>
<td>1,265</td>
<td>$7,151.9</td>
<td>3</td>
</tr>
<tr>
<td>Russia</td>
<td>838</td>
<td>$3,667.2</td>
<td>4</td>
</tr>
<tr>
<td>Italy</td>
<td>768</td>
<td>$1,718.3</td>
<td>5</td>
</tr>
<tr>
<td>Austria</td>
<td>181</td>
<td>$961.1</td>
<td>6</td>
</tr>
<tr>
<td>Hungary</td>
<td>546</td>
<td>$793.2</td>
<td>7</td>
</tr>
<tr>
<td>Brazil</td>
<td>207</td>
<td>$718.0</td>
<td>8</td>
</tr>
<tr>
<td>Spain</td>
<td>293</td>
<td>$683.1</td>
<td>9</td>
</tr>
<tr>
<td>Poland</td>
<td>203</td>
<td>$674.5</td>
<td>10</td>
</tr>
<tr>
<td>Turkey</td>
<td>295</td>
<td>$667.3</td>
<td>11</td>
</tr>
<tr>
<td>United States</td>
<td>280</td>
<td>$631.0</td>
<td>12</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>131</td>
<td>$627.8</td>
<td>13</td>
</tr>
<tr>
<td>France</td>
<td>175</td>
<td>$627.7</td>
<td>14</td>
</tr>
<tr>
<td>Switzerland</td>
<td>73</td>
<td>$479.5</td>
<td>15</td>
</tr>
<tr>
<td>Slovenia</td>
<td>86</td>
<td>$451.0</td>
<td>16</td>
</tr>
<tr>
<td>Slovakia</td>
<td>116</td>
<td>$439.8</td>
<td>17</td>
</tr>
<tr>
<td>Taiwan</td>
<td>251</td>
<td>$434.5</td>
<td>18</td>
</tr>
<tr>
<td>Iceland</td>
<td>154</td>
<td>$432.6</td>
<td>19</td>
</tr>
<tr>
<td>South Korea</td>
<td>108</td>
<td>$336.1</td>
<td>20</td>
</tr>
</tbody>
</table>

*Source: Global Wellness Institute*
Relaxation at hot springs – Okinawa

Natural Hot Springs of Saturnia

Deep Creek Hot Springs (San Bernar...

Hot Springs in Costa Rica in La Fortuna
### Economic Impact Assessment

**Peninsula Hot Springs – Economic Impact Assessment**

**Economic Impact to the Mornington Peninsula Region**

<table>
<thead>
<tr>
<th>Economic Impact</th>
<th>Mornington Peninsula Region</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Increase in direct expenditure</strong></td>
<td>$53.5m (FY17)</td>
</tr>
<tr>
<td><strong>Direct and indirect Gross Regional Product (Value-added)</strong></td>
<td>$47.5m (FY17)</td>
</tr>
<tr>
<td><strong>Direct and indirect jobs supported</strong></td>
<td>481 (FY17)</td>
</tr>
<tr>
<td><strong>Annual PHS guest numbers (FY17)</strong></td>
<td>438,939</td>
</tr>
<tr>
<td><strong>Total specific and extended stay visitors to the Region (FY17)</strong></td>
<td>236,427</td>
</tr>
<tr>
<td><strong>Average length of stay of specific and extended stay overnight visitors to the Region (FY17)</strong></td>
<td>1.7 Intrastate</td>
</tr>
<tr>
<td><strong>Average daily spend for specific and extended stay visitors (FY17)</strong></td>
<td>$125 Intrastate</td>
</tr>
</tbody>
</table>

**PHS** is a unique Australian spa and hot spring ecotourism attraction located on the Mornington Peninsula in Victoria. Operating since 2005, PHS provides therapeutic treatments, wellness services and larger bathing attraction to cater for all ages.

PHS is visited by approximately 440,000 guests annually to attend one, or both, of PHS’ main areas – the Bath House and Spa Dreaming Centre. The Bath House, more social and family friendly, attracts approximately 365,000 guests each year who can freely bath in a variety of hot springs, pools and saunas. The Spa Dreaming Centre, a tranquil space with private pools and spa treatment, attracts approximately 75,000 guest annually and seeks to provide a unique relaxation and rejuvenation experience.

EY has been engaged by Peninsula Hot Springs Pty Ltd to estimate the annual economic impact to the Mornington Peninsula Region (the ‘Region’) from visitation to Peninsula Hot Springs (PHS). For the purpose of this assessment the economic impact is based on activities during FY17 (July 2016 to June 2017). We have also provided a high level estimate of the total Net Present Value (NPV) of the annual economic impact over an assumed 20 year period (FY17 to FY36).1

The economic impact estimates in this report relate directly to the increase in expenditure generated by visitors to the Morning Peninsula Region (MPR) that come to the Region specifically, or extend their stay, because of PHS.

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1 Applies a 7% real discount rate
Australian hot springs
Cunnamulla Hot Springs, NSW

Tawarri Hot Springs, Perth, WA

The Tawarri Hot Springs project is located on the banks of the Swan River in the established Perth suburb of Dalleth. Our proposal is to reinvigorate the foreshore with a fluid, graceful spa located atop a dormant hot spring. Our design is largely unobtrusive as it nestles alongside the riverbank, creating a new destination point for Perth – built upon heritage and water.
Twelve Apostles Hot Springs

Metung Hot Springs
Tipperary Hot Springs
wellness experiences

bathing workshops
wellness experiences

guided walks
wellness experiences

arts & entertainment
wellness experiences
Pathway to Global Wellness Culture

World Wellness Weekend, September 22-23
GLOBAL THERMAL THINK TANK

G3T
2017

CALIFORNIA & NEW MEXICO USA
2-7 OCTOBER

An invitation-only meeting of industry minds during an exciting period for hot springs worldwide.

LET YOUR IDEAS FLOW WITH THOSE OF WORLDWIDE INDUSTRY LEADERS

Last year’s inaugural event saw hot spring leaders from Australia, Austria, China, Germany, Hungary, USA, UK, France, Thailand and many more.

What can you bring to the springs this year?

www.ThermalThinkTank.com

LET YOUR IDEAS FLOW WITH WORLDWIDE INDUSTRY LEADERS

Join us for an invitation-only meeting of hot springs industry minds. Hot spring owners, operators, senior managers and researchers from across the globe discuss a range of industry issues and opportunities to collaborate and grow together.

OCTOBER 13 & 14
2016

HOTEL AN DER TERME
BAD ORBI
GERMANY

TUSCANY ITALY

GROTTA GIUSTI ITALIA
LET YOUR IDEAS FLOW WITH WORLDWIDE INDUSTRY LEADERS AT BISHUWAN HOT SPRINGS RESORT

Join us for an invitation-only meeting of hot springs industry minds

The G3T is an annual conference activity of the Hot Springs Initiative, a global network of hot springs owners, operators, academics and industry participants dedicated to exploring the diverse potential of geothermal waters to contribute to the health and wellbeing of humans, as well as the economics and societies in which they are found.

We seek to connect communities who have geothermal water and provide opportunities to meet, share thoughts and collectively grow the industry while generating consumer and policy awareness of the unique natural and sustainable resources found in every country on earth.

The First Global G3T, event is in Germany (2018) and Italy and last spring edition from Australia, Austria, China, Germany, Hungary, Italy, Japan, USA, UK, France, Thailand and many more.

What can you bring to the Guangdongideo?

www.thermalthinktank.com

https://globalwellnessinstitute.org/initiatives/hot-springs-initiative/global-hot-springs-resources/
The Wellness Moonshot
A World Free of Preventable Disease
Access to bathing water is a critical health issue

1 in 3 people on earth cannot bathe and nearly 1000 children die each day from waterborne disease.

Everyday women and girls spend 200 million hours gathering water - to them water is time, education and hope.
A bucket of water for everybody, every day, that is our vision.

Water is life and when water flows well, wellness and wealth follow. Yet, currently one third of the people on earth do not have access to bathing water and therefore cannot adequately wash off their urine, faeces and menstrual blood.

These are the poorest people in the world and include nearly 1 billion people without access to sufficient drinking water or food, and 2.4 billion people who lack access to bathing water.

world bathing day

Join us in supporting Bathe the World Foundation with their petition to the United Nations to declare 22 June World Bathing Day. World Bathing Day will be an annual celebration of bathing in all cultures of the world. For more details and to sign the petition visit the link below.

bit.ly/bathetheworld

http://worldbathingday.org

http://bathetheworld.org
Bathe the World Event - 22 June, 2023
Questions?