



GLOBAL WELLNESS
SUMMIT // TYROL 2016

Soaking Up History

Steaming into the Hot Springs
(R)Evolution



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Amy McDonald

Chair of Global Hot Springs Initiative

Global Wellness Institute

CEO, Under a Tree



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Mark Hennebry

Vice Chair of Global Hot Springs Initiative

Global Wellness Institute

Board of Director

Danubius Hotel Group, UK



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David Clay Large

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

Historical Perspective

Bad Gastein in Winter





Getting Naked at the Friedrichsbad

Baden-Baden Casino



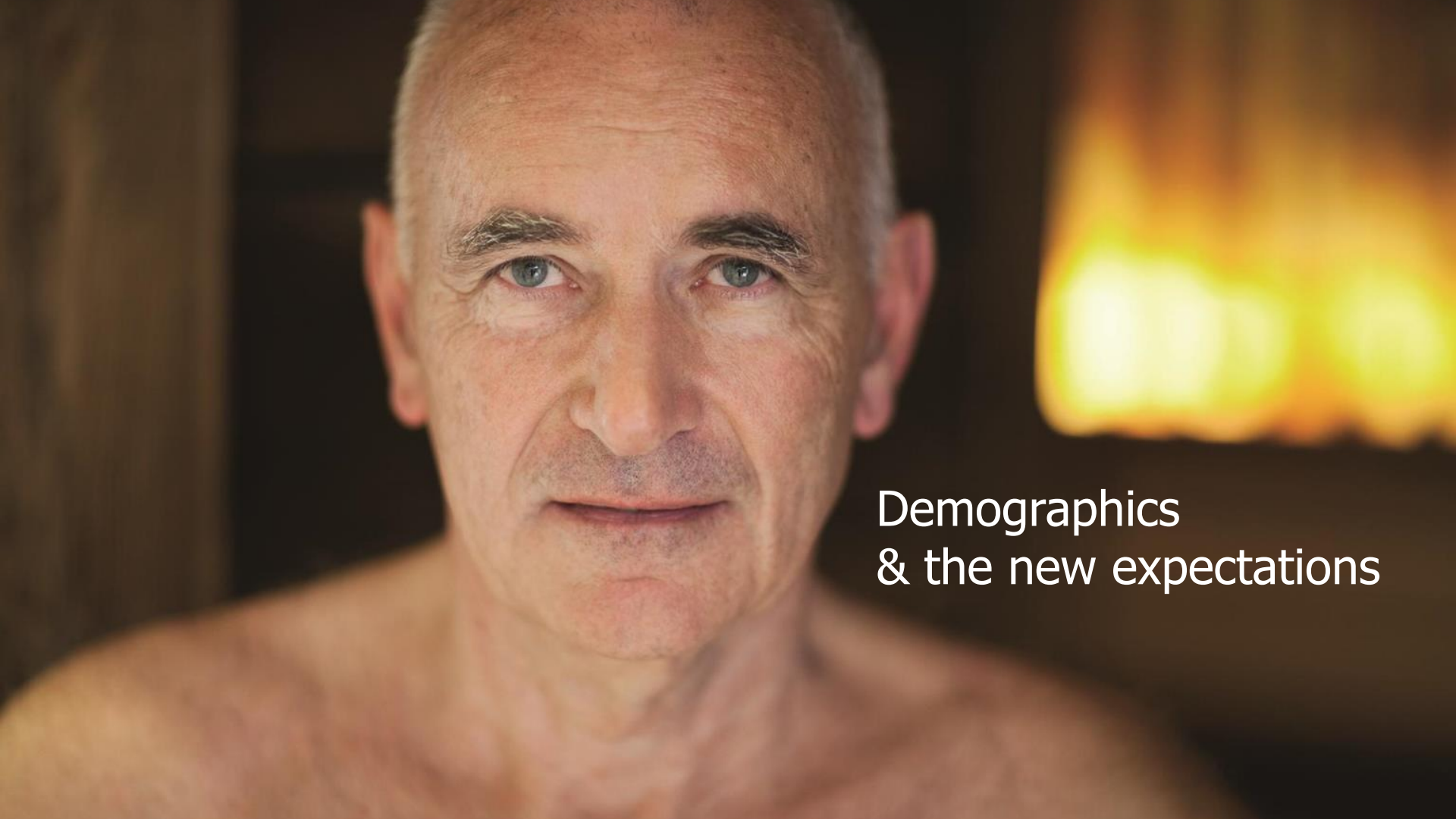


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Tom J. Bauer

COO, VAMED Vitality World, Austria

European Perspective



Demographics
& the new expectations

Diversity
& the new accessibility





relax

relax

Time
& the new level of luxury

Space
& the new flexibility





Contemplation



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Charles Davidson

CEO & Co-Founder

Peninsula Hot Springs, Australia

Australian Perspective

Australian Hot Springs



Hastings Caves & Thermal Springs

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

KEY



PORTLAND ●

PORT FAIRY ●

WARRNAMBOOL ●

PETERBOROUGH ●

PORT CAMPBELL ●

BELLARINE PENINSULA ●

MORNINGTON PENINSULA ●

PHILLIP ISLAND ●

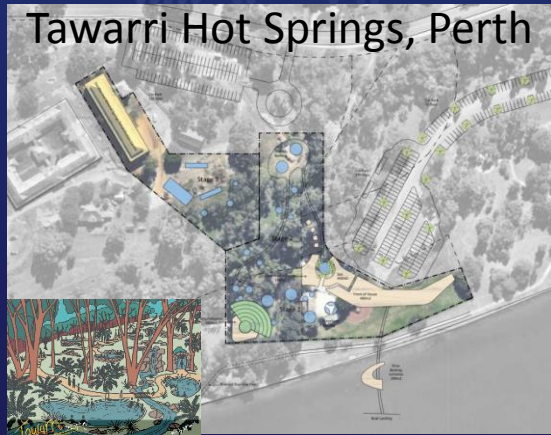
MORWELL ●

LOCH SPORT ●

METUNG ●

PAYNESVILLE ●

Australian Planned Hot Spring Developments







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Tominori Maruyama (Maru)

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

Japanese Perspective

Variety of **Onsen** Facility

Ryokan



Club Resort



Pension / Inn



Hotel



Onsen
(Hot Spring)



Day-Visit Onsen

Market Size of Onsen Related Industry (Japan)

Types of Accommodation	Annual Turnover (billion yen)		
	2011	2014	Growth Rate
Ryokan	1,425	1,420	-0.4%
Hotel	949	1,201	26.6%
Club Resort	264	314	18.9%
Pension / Inn	73	75	2.7%
Total	2,711 (\$ 27 billion)	3,010 (\$ 30 billion)	11.0%

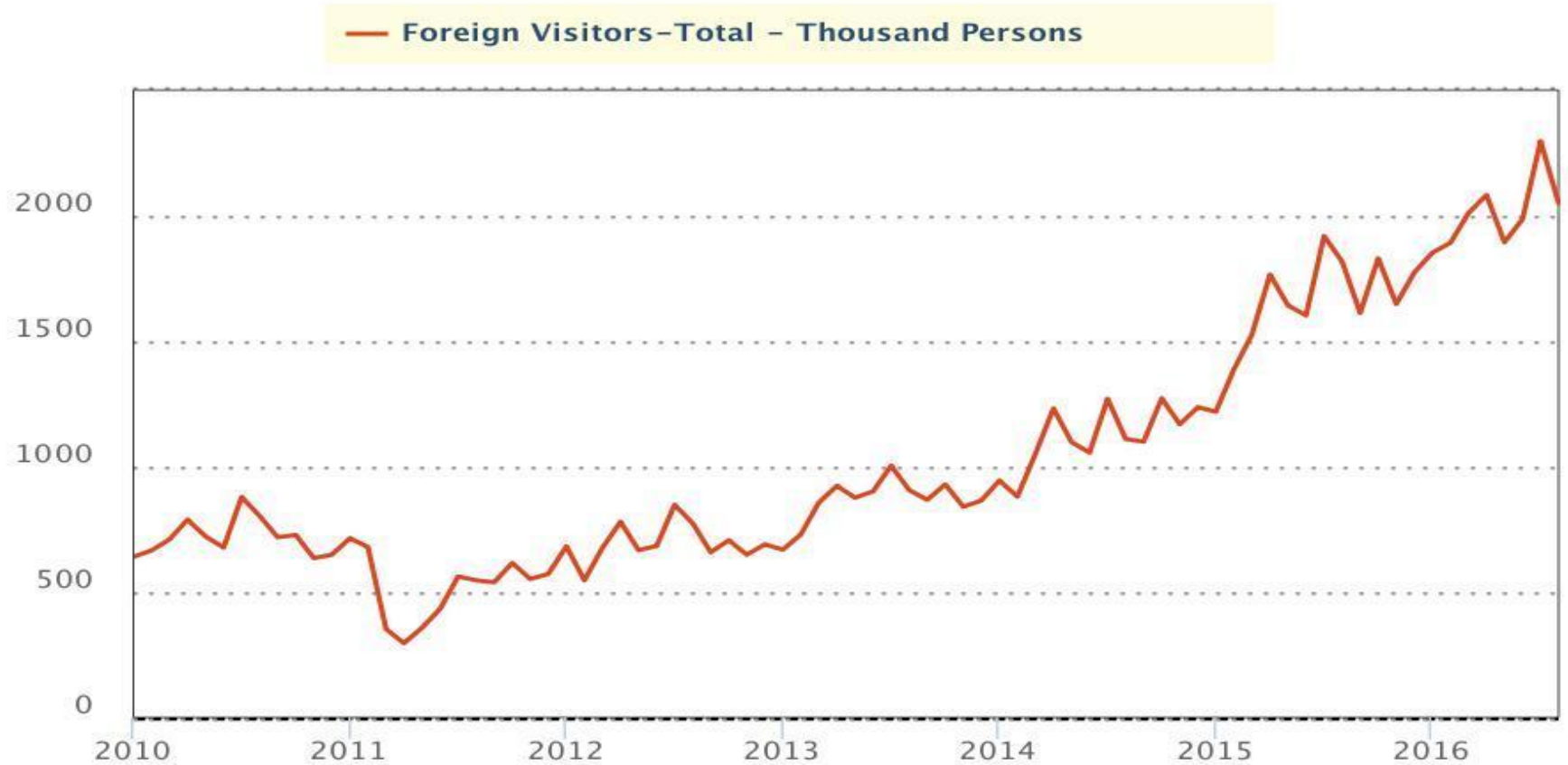
Source: *White Paper of Leisure 2015*, Japan Productivity Center

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



Source : JNTO, JMA

www.japanmacroadvisors.com/mycharts/#2499

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.

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.

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.

Radioactive Spring: Murasugi Onsen

Effects:

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



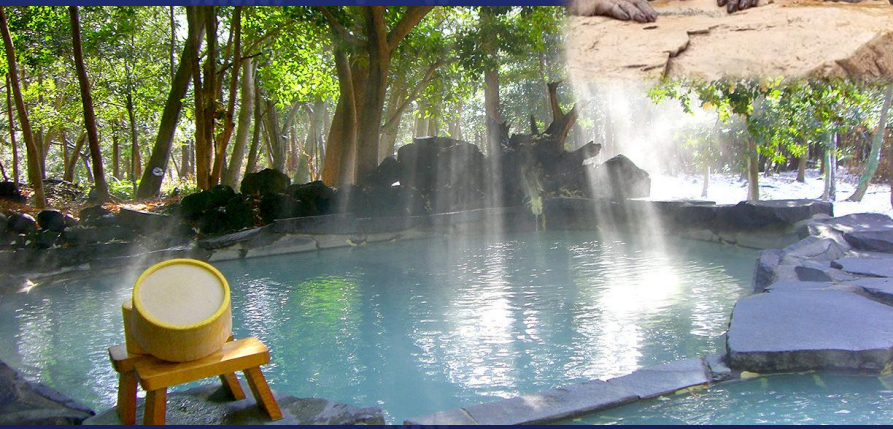
Temperature: 26°C

Elements:

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



Thank you!





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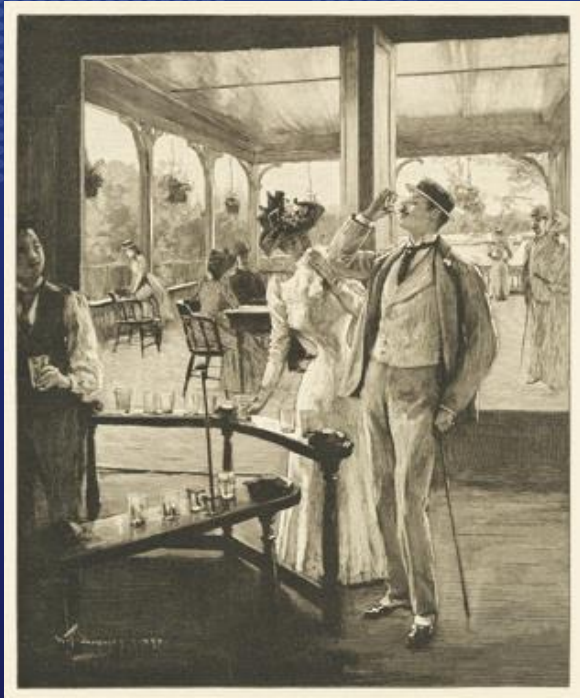
Wendi Gelfound

Director of Marketing

Ojo Caliente Mineral Springs Resort & Spa, U.S.

American Perspective

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



OJO CALIENTE
REAL-ESTATE
NEW MEXICO
Est. 1865

A spot of natural beauty where thousands flock each year for strength, physical well-being and relaxation. Open all year-round.



IMAGES of America
HOT SPRINGS
FROM CAPONE TO COSTELLO

HOT SPRINGS: FROM CAPONE TO COSTELLO ROBERT K. RAINES

Robert K. Raines

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



**GLOBAL WELLNESS
INSTITUTE™**
EMPOWERING WELLNESS WORLDWIDE

Expansion is HOT





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Audience Question

Panel Response



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Panel Response



**Global
Hot Springs
Quiz Show**

Question:

How many people visit Austrian thermal spas annually?

(a) 3.1M

(b) 5.6M

(c) 9.4M

Answer:

(c) 9.4M

Question:

What Central European spa is associated with Ludwig van Beethoven?

Answer:

Baden-Bei-Wien

Question:

What German spa pioneered
the development of casino gambling?

Answer:

Baden-Baden

Question:

Which country is famous for its Blue Lagoon Geothermal Spa?

Answer:

Iceland

Question:

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

Answer:

Old Faithful

Question:

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

(a) 500

(b) 217

(c) 1100

Answer:

(b) 217

Question:

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

Answer:

Oldest Hot Spring Hotel
(1,300 years old)



Question:

Where is the largest thermal lake in Europe?

Answer:

Heviz, Hungary

Question:
What is the German word for Spa?

Answer:
Bad

Question:

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

Question:

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.

Question:

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

Answer:

Budapest

Question:

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

Answer:

Ojo Caliente Mineral Springs

Question:

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

Answer:

Peninsula Hot Springs

Question:
Where is the largest thermal lake
in the world?

Answer:
Waimungu Thermal Valley,
New Zealand

Question:

Where is the southernmost hot springs located in the world?

Answer:

Antarctica

Question:

Which Onsen has been awarded
“3-Stars” by Michelin?

Answer:

Hyotan Onsen at Beppu in Japan

Question:

What kind of hot spring gas
is lighter than air?

Answer:

Hydrogen Gas

Question:

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

Answer:

25 Celsius (77 Fahrenheit)

Question:

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.

A glowing marquee sign with a white center and a border of bright yellow lights. The word "Prizes" is written in a bold, red, sans-serif font in the center. The background is a blue gradient with a pattern of small white dots.

Prizes