



***Macro-economic data
of Balneotherapy in
Europe***



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In a scientific survey about four years ago, a French expert mentioned in his abstract:

“... the lack of information leads to pragmatic evaluations”.

Today, towards the end of 2013, if we talk about a comparable evaluation of economic data on European level the following question arises:

“Mission impossible?”



The reasons for this are manifold and will not be further analysed here.

However, it should also be in the future a key demand of ESPA to strengthen the lobbying regarding the implementation of a common statistic for European spas and health resorts.



„Mission impossible?

- Lets have a look at the existing data!**



- 1.400 spa communities and health resorts in Europe
- Approx. 10.000 facilities
- The industry employs direct and indirectly 750.000 people
- Annual turnover of 45 billion euro
- Europe wide more than 200 million overnights



Jobs	750.000
Turnover	45 Mrd €
Jobs in Germany (direct und indirect)	400.000
Turnover in Germany	30 Mrd €
Jobs in Italy (direct und indirect)	80.000
Jobs in France	100.000

Source: Estimated DHV, EHV and Federterme 2011

Overview – Statistics



Country	Number of Overnights			Number of Guests		
	2010	2011	2012	2010	2011	2012
Czech Republic (CZ Spa Ass.)	5.653.004	5.434.383	4.979.375	375.866	360.178	360.537
Estonia	877.175	938.921		309.253	349.983	
France (CNETh)	9.195.030	9.292.428	9.468.054	510.835	516.246	526.003
Germany (DHV)	102.868.513	108.930.689	110.408.479	20.105.253	21.954.583	22.442.632
Hungary (HCSO & Hu Tourism Pcl.) (Data based on the 25 most important Spa-companies, with 32 spas/members of the ass.)	11.883.258	12.570.166	13.311.239	12.942.890	13.850.394	14.155.795
Iceland , HNLFI	43.800	36.360		1.765	1.730	
Iceland , Blue Lagoon	4.637			412.839		
Italy (FEDERTERME, ISTAT)	11.671.987	11.749.342		3.020.932	3.185.010	
Latvia (only Jurmala)	408.727	348.350	450.424	99.623	99.884	122.759
Lithuania (only Palanga)	2.082.805	2.450.358		500.000	588.235	
Luxemburg (Domaine Thermal de Mondorf)	6.767	5.825	6.320	10.150	8.563	9.986
Poland (Stowarzyszenie Gmin Uzdrowiskowych RP)	15.263.184	15.980.260	17.010.172	4.455.504	4.681.017	4.912.867
Portugal (ATP)	760.000		650.000	91.528		99.128

International Arrivals in European spas and health resorts



Country	Total arrivals in Spas and Health Resorts	International arrivals in Spas and Health Resorts
Czech Republic (Czech Spas Association 2012)	360.537	158.884
Germany (DVH 2012)	22.442.632	2.555.661
Hungary (HCSO & Hungarian Tourism Pcl. 2012)	648.500	229.200
Italy (FEDERTERME 2011)	3.185.010	1.351.976
Latvia (only Jurmala) (Jurmala City Council 2012)	112.897	82.913
Luxemburg (only Domaine Thermal de Mondorf 2012)	46.636	36.652
Poland (Stowarzyszenie Gmin Uzdrowiskowych RP 2012)	4.912.867	1.808.243
Portugal (ATP 2012)	99.128	5.900

Out of 22 European destinations reporting foreign visitors' figures through first half of the year, the vast majority posts positive growth..... (ETC Report, July 2013)



HEALTH SPA CUSTOMERS

NUMBER OF ARRIVALS AND OVERNIGHT STAYS

YEARS	ITALIANS		FOREIGNERS		TOTAL	
	ARRIVALS	STAYS	ARRIVALS	STAYS	ARRIVALS	STAYS
<i>Absolute values</i>						
2008	1.785.834	7.406.835	1.314.694	4.698.306	3.100.528	12.105.141
2009	1.777.381	7.265.222	1.171.337	4.347.716	2.948.718	11.612.938
2010	1.780.986	7.189.925	1.239.946	4.482.062	3.020.932	11.671.987
2011	1.833.034	6.993.314	1.351.976	4.756.028	3.185.010	11.749.342
<i>Percentage variations</i>						
2009/2008	-0,5	-1,9	-10,9	-7,5	-4,9	-4,1
2010/2009	0,2	-1,0	5,9	3,1	2,4	0,5
2011/2010	2,9	-2,7	9,0	6,1	5,4	0,7



The German statistics show a minimum of 4 overnight stays in spas and health resorts. The reason for this is that guests staying 4 or more nights in a spa, are most likely guests who are staying primarily for health purposes and not for business or to visit friends and acquaintances.



	Mineral/ peat spas	2012/2011 %		Climatic health resorts	2012/2011 %		Seaside spas /health resorts	2012/2011 %		Kneipp spas/ health resorts	2012/2011 %		Total
Ankünfte													
Bundesrepublik Deutschland	7.130.386	2,1		3.304.867	4,2		7.467.177	1		1.987.541	1,6		19.889.971
Anderer Wohnsitz	1.218.084	4		785.470	8,6		258.166	9,8		293.941	1,3		2.555.661
2012 absolut	8.348.470	2,3		4.090.337	5,00		7.725.343	1,3		2.278.482	1,5		22.442.632
Übernachtungen													
Bundesrepublik Deutschland	40.071.249	1,9		13.858.653	2,7		40.209.133	0,0		9.132.950	0,3		103.271.985
Anderer Wohnsitz	2.976.203	6,2		2.422.204	6,1		844.591	12,9		893.496	1,0		7.136.494
2012 absolut	43.047.452	2,2		16.280.857	3,2		41.053.724	0,2		10.026.446	0,3		110.408.479
Aufenthaltsdauer (Nächte)													
Bundesrepublik Deutschland	5,60			4,20			5,40			4,60			
Anderer Wohnsitz	2,40			3,10			3,30			3,00			
2012 absolut	5,20			4,00			5,30			4,40			

Spa and health resort statistic DHV 1999 – 2012 - Arrivals



	Mineral and peat spas	Climatic health resorts	Seaside spas/ health resorts	Kneipp spas/health resorts	Total
1999	5.700.857	3.312.442	4.788.909	1.837.148	15.639.356
2000	6.099.605	3.534.588	5.064.124	1.970.475	16.668.792
2001	6.234.372	3.336.014	5.265.106	2.048.659	16.884.151
2002	6.129.399	3.250.651	5.361.952	1.982.853	16.724.855
2003	6.109.789	3.263.893	5.787.913	1.968.095	17.129.690
2004	6.203.661	3.277.010	5.698.489	2.035.355	17.214.515
2005	6.240.972	3.453.527	5.848.652	2.080.592	17.623.743
2006	6.476.794	3.458.627	6.044.625	2.084.582	18.064.628
2007	7.074.296	3.427.895	6.347.201	2.104.294	18.953.686
2008	7.197.065	3.503.279	6.504.031	2.126.503	19.330.878
2009	7.199.068	3.231.745	6.621.158	2.471.037	19.523.008
2010	7.667.580	3.371.706	6.630.696	2.435.271	20.105.253
2011	8.204.474	3.793.347	7.636.156	2.320.606	21.954.583
2012	8.348.470	4.090.337	7.725.343	2.278.482	22.442.632
Veränderungen 2012/2001 absolut	+2.647.613	+457.333	+2.371.050	+271.947	+5.070.432
2012/2001 in %	33,9%	22,6%	46,7%	11,2%	32,9%
Veränderungen 2012/2011 absolut	+143.996	+296.990	+89.187	+34.809	+488.049
2012/2011 in %	+2,30	+5,00	+1,30	+1,50	+2,22

Spa and health resort statistic DHV 1999 – 2012 – Overnight stays



	Mineral and peat spas	Climatic health resorts	Seaside spas/ health resorts	Kneipp spas/health resorts	Total
1999	39.238.947	17.534.352	31.342.372	10.347.391	98.463.062
2000	41.549.361	18.296.507	33.141.168	10.840.043	103.827.079
2001	42.428.162	17.735.221	34.303.796	11.174.754	105.641.933
2002	41.386.590	16.620.781	34.502.403	10.544.937	103.054.711
2003	39.776.697	16.273.802	35.737.856	10.282.473	102.070.828
2004	38.199.403	15.579.112	34.585.938	10.186.191	98.550.644
2005	37.558.002	15.885.869	34.164.653	10.081.114	97.689.638
2006	37.803.750	15.548.249	34.476.478	9.917.500	97.745.977
2007	40.033.548	15.215.876	36.193.943	9.882.162	101.325.529
2008	40.559.449	15.430.868	36.395.097	10.146.448	102.531.862
2009	40.312.697	13.702.697	36.829.389	11.890.365	102.735.148
2010	41.017.692	13.780.131	36.439.195	11.631.495	102.868.513
2011	42.283.704	15.401.874	41.045.518	10.199.593	108.930.689
2012	43.047.452	16.280.857	41.053.724	10.026.446	110.408.479
Veränderungen 2012/2001 absolut	619.290	-1.454.364	6.749.928	-1.148.308	4.766.546
2012/2001 in %	1,46	-8,20	19,68	-10,28	4,51
Veränderungen 2012/2010 absolut	+763.748	+878.983	+8.206	-+173.147	+1.477.790
2012/2010 in %	+2,20	+3,20	+0,20	+0,30	+1,36

Spa and health resort statistic DHV 1999 – 2012 – Length of stay



	Mineral and peat spas	Climatic health resorts	Seaside spas/ health resorts	Kneipp spas/health resorts	Total
1999	6,88	5,29	6,54	5,63	6,30
2000	6,81	5,18	6,54	5,50	6,23
2001	6,81	5,32	6,52	5,45	6,26
2002	6,75	5,11	6,43	5,32	6,16
2003	6,51	4,99	6,17	5,22	5,96
2004	6,16	4,75	6,07	5,00	5,72
2005	6,02	4,60	5,84	4,85	5,54
2006	5,84	4,50	5,70	4,76	5,41
2007	5,66	4,44	5,70	4,70	5,35
2008	5,64	4,40	5,60	4,77	5,30
2009	5,60	4,24	5,56	4,81	5,26
2010	5,30	4,10	5,40	4,70	4,88
2011	5,20	4,10	5,40	4,40	4,78
2012	5,16	3,98	5,31	4,40	4,92



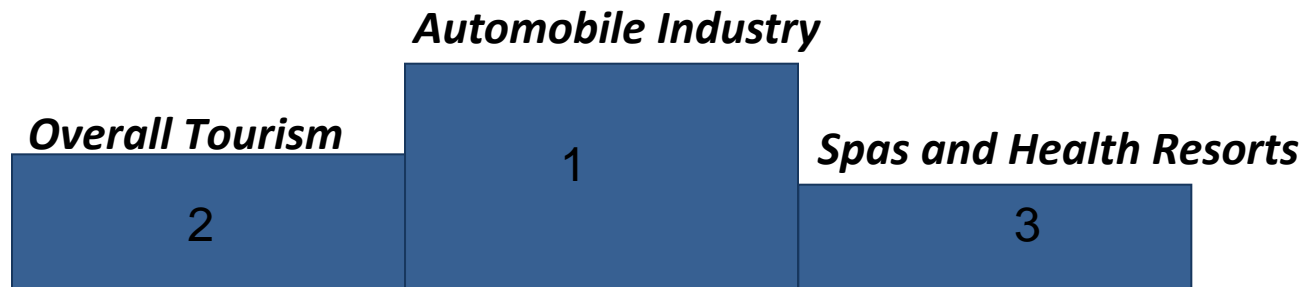
In this period there was an increase of
approximately:

Guest:	+ 30%
Overnight stays:	+ 12%

However, a decrease in length of stay by 1.38
nights,
in the classical mineral and peat spas even by 1.72
nights in 13 years.



The spas and health resorts therefore rank third in gross domestic product directly after the automobile industry and the overall tourism:





- 89 stations thermales sont en activité sur le territoire français.
- 9,5 millions de journées de soins sont délivrées tous les ans par les établissements thermaux.
- 527 000 curistes et plus séjournent en moyenne 18 jours dans les stations thermales françaises.



- 100 000 emplois directs, indirects ou induits dépendent du thermalisme.
- 690 millions d'euro de dépenses indirectes que représentent chaque année les cures thermales.
- Le PIB thermal représente près de 500 millions d'euros dont 43% reviennent aux budgets publics au titre des prélèvements fiscaux et sociaux.
- 71% des communes thermales ont moins de 5000 habitants. Pour elles, souvent, l'activité thermique représente l'essentiel de leurs ressources.



Expenses for health cure and rehabilitation programmes in individual European countries:

- France: 350 000 000 €
- Italy: 719 300 000 €
- Germany: 6.400 000 000 €
(Breakdown to GKV, RV, PKV and public services)
- Hungary: 23 000 000 €
(Just expenses for medical treatments)

Expenses for Health Cure and Rehabilitation Programmes



Expenses for health cure and rehabilitation programmes
in Italy 2012:

Total expenses 719 300 000 €

Total cure 332 022 000 €

Public health 122 000 000 €

2012-2011 = -7,8%

Private patients 210 022 000 €

Other services and products

387 268 000€

Expenses for Health Cure and Rehabilitation Programmes



Expenses for health cure and rehabilitation programmes in Italy 2013 (estimated):

Trend until September 2013 -3% loss for cure

Other activities and products grow by +2%

For the overall performance the growth in other activities and products nearly equals the loss of cure in Italy.



Proportion of the health cure and rehabilitation programmes of total healthcare expenses:

France:	0,15 %
Italy:	0,14 %
Germany:	2,15 % (0,8%)



Costs per person for cures in individual countries of the EU:

France 650 € per patient in 18 days

Italy 425 € per patient in 2 weeks

Germany: 1080 € per patient in 3 weeks



Churchill pretended:

„I believe only in those statistics that I have falsified myself!“

Regarding the actual existing statistics we have to see, that we must always distinguish and define exactly, what we are talking about!



**Thank you very much for your kind
attention!**