Thermalism is « the therapeutic use of hot spring water ».

France counts 102 thermal spa resorts which are all members of the National Professional organisation, called CNETH (Conseil National des Exploitants Thermaux).

Thermal medicine is partially reimbursed (65 %) by the Public Health System as an essential complement to public health. Private insurance system cover generally 35%.
2013 Key figures

- Number of days of treatments in 2013: **9 729 306**
- Number of thermal stays in 2013: **540 517**
- Average length of stays: **18 days**
- Progression in 2013: **+ 2,68 %**
- Evolution 2009 - 2013: **+ 9,59 %**
- Progression since 2009: **+ 48 000 curists**

Source: CNETH, June 2014
Map of Thermalism in France

12 major therapeutic areas have been defined by the French Social Security
- Rhumatology
- ENT
- Cardio-vascular diseases
- Phlebology
- Neurology
- Psychosomatic diseases
- Urinary disorders
- Gynecology
- Digestive disorders and metabolism
- Dermatology
- Growth disorders in children
- Mucosal diseases
Structure of Cares

EVOLUTION OVER THE PAST TEN YEARS – SPLITTING OF THE THERMAL CARES

- rhumatology
- respiratory
- digestive system
- phlebology
- phychosomatic diseases
- heart diseases
- neurology
- gynecology
- child dvpt diseases

Source: CNETH, June 2014
2013 French Thermalism figures

- Global estimated Revenues including Lodging, F&B, and other additional services: 990 M€
- Turnover generated by Health Thermal treatments: 330 M€
- Other Wellness activities: 50 M€
French Thermalism in the future
9,5 million Euros invested by AFRETH:
- 7,4 million Euros for SMR studies : aims to measure and prove the medical efficiency given by thermal stays.
- 2,1 million Euros for R&D studies

120 projects launched,

33 projects financed with an average of 300 K Euros per study.

Source: CNETH, June 2014
Medical publications of AFRETH in 2013:
- PACTHE study (since 2009)
- SPECTH study (since 2008)
- THERMES & VEINES (since 2007)
- MAATHERM (2012)

Medical publications of AFRETH in 2014:
- POLYARTHROSE (extended from the study on Thermoarthrose)
- ROTHATHERM (since 2007)
- ECOTHERM (Thermal Curists behaviours on a 35 000 panel)
- MICROBIOTE (starting 2014)

Source: CNETH, June 2014
A SWOT of French Thermalism

**Strengths**
- Proved Efficiency for Chronic Diseases
- Organic Medicine: a non iatrogenic process
- Interest from the Hospitality Business and the private Insurance system.

**Weaknesses**
- Needs of investments: High CAPEX
- High Renovation budgets for infrastructures
- Poor Interaction level with the global Wellness business.

**Opportunities**
- Sustainability and security of water resource
- High Touristic value of Thermal spots
- Heavy needs and interest from Emerging countries.
- Meeting the 35-55 year old market

**Threats**
- Links with the National Health Systems
- Specific Sanitary risks (Legionellosis)
- Risk of denaturation of the original medical concept.
Integrating the needs of people...

Need of self care (physical, mental, spiritual):
(i) wellness Tourism ($439 billion);
(ii) Sports Tourism ($250-375 billion);
(iii) Medical Tourism ($50-60 billion)

Need of discovering:
(i) cultural tourism: ($800 billion - $1.1 trillion);
(ii) culinary tourism ($350-550 billion);

Need of being unique:
(i) agritourisme ($60-160 billion); (ii) Adventure Tourism ($115-150 billion); (iii) Spiritual Tourism ($37-47 billion);
(iv) Volunt-tourism ($10-20 billion); (v) Eco sustainable tourism ($325-480 tourism)

Source: A psychological view of Global Tourism Industry; source: SRI international; the Global Wellness Tourism Economy 2013; 2014 by Global Wellness Institute
Thermalism combines a soft and natural medicine with a touristic development scheme.
Thank you for your attention

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