MINERAL SPRINGS IN GREECE

NATURAL RESOURCES
SPA-FACILITIES
CHALLENGES

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Mineral Springs: The Power of Nature

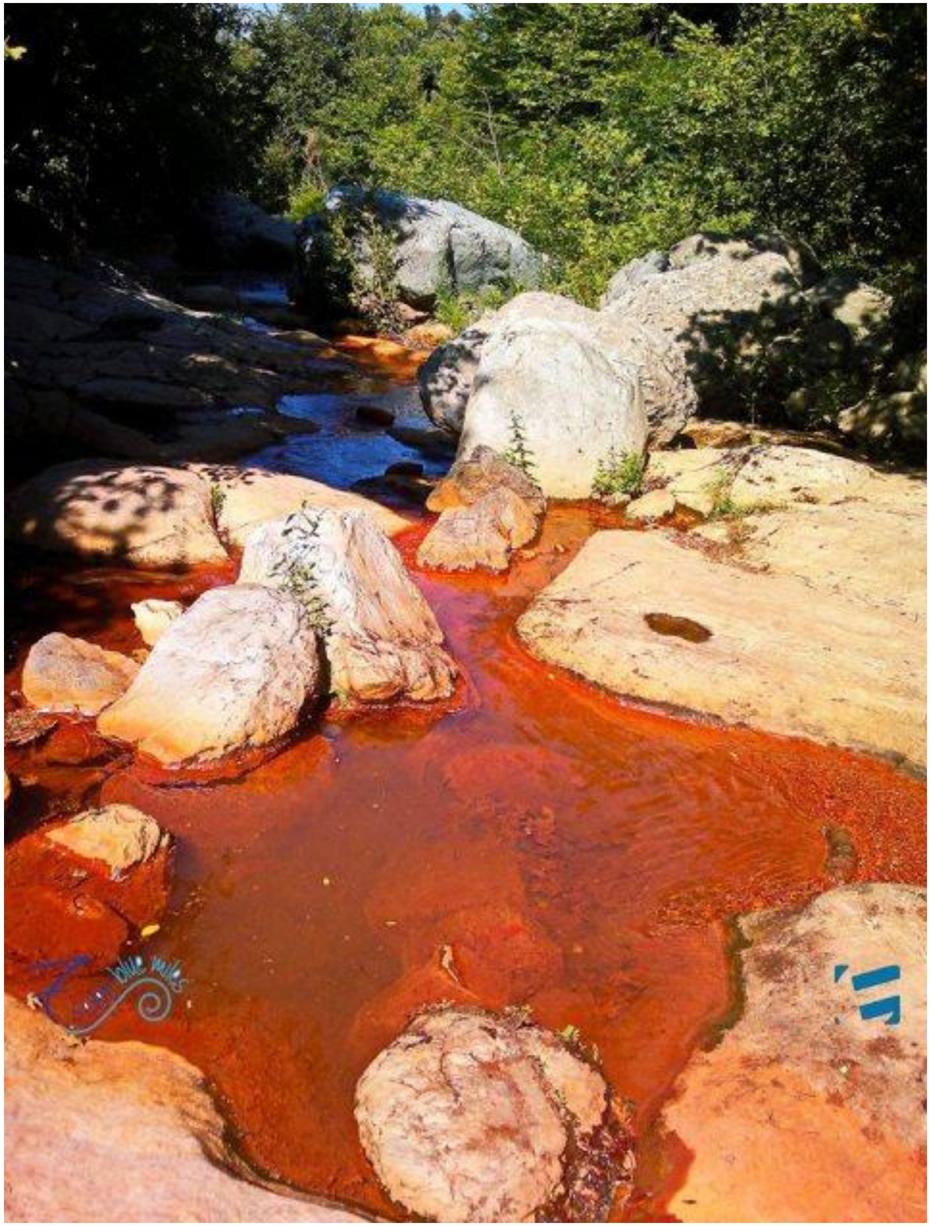
- A good name: Ιαματικοί Φυσικοί Πόροι/ Therapeutic **Natural** Resources
- People are looking for „nature“ – the power of nature is best represented by the mineral springs
- Greece is moving: Strong seismical acitivity, faultings, riggs – a lot of mineral springs. (112 recogniced – hydrotherapy, mud bath, vapour)
- Operating: **81 springs**
- Rich depots, different composition, at ideal places

I. RESOURCES: Polichnitos/Lesvos, 92˚C

Pozar: Rich Spring, Winter Tale

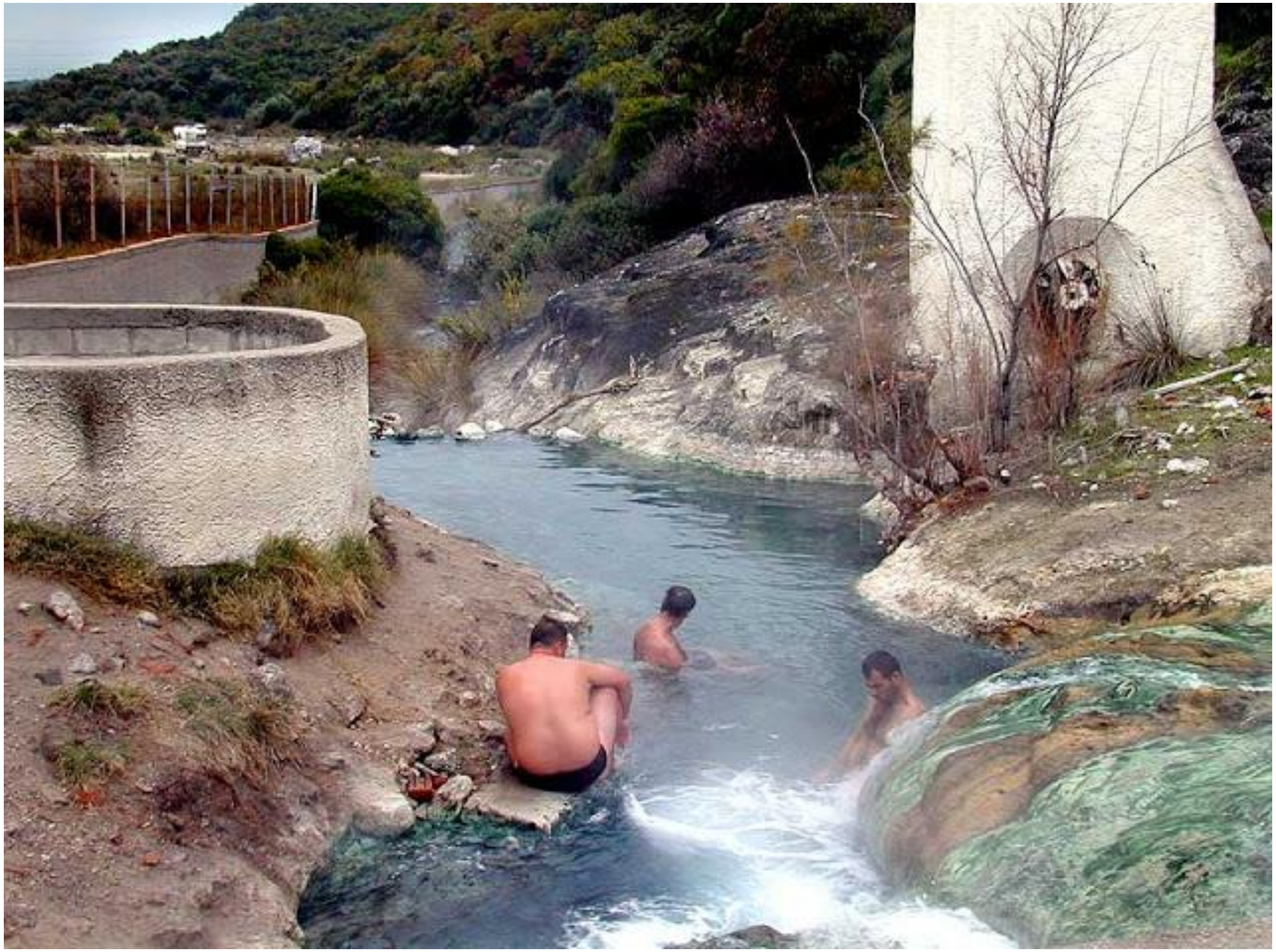
Krinides/ Kavala: Mud-Figurines

Kokkina Nera/ Thessaly: Let´s Drink Iron-Water



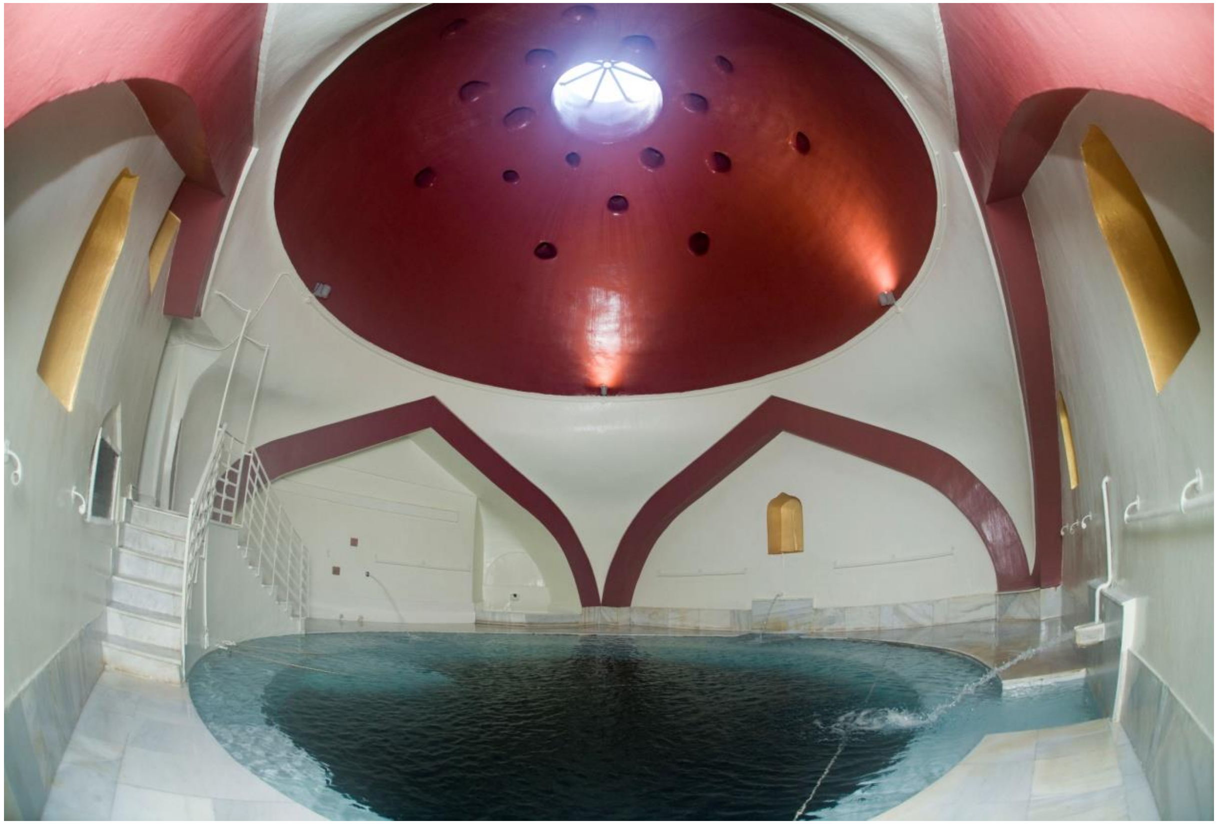
II. Places: Luxury - Thermae Sylla Spa & Wellness Aidipsos

... and the Ugly Side: Thermopylae



Sleeping Beauties - Kaiafas

Fine, Old Architecture - Langadas



… and Italian Orientalism, Kallithea/Rhodos

(1929: Pietro Lombardi)

Elegance – Therma/Lesvos

… and the Logic of the Hospital (Ag. Kirikas/ Ikaria)

Short Profile of Spa-Facilities

- **65 Prozent** of the tickets are sold in Central Greece and Central Macedonia. 3rd place: Lake Vouligameni, Attiki
- The **Season is too short**: Only 30% of facilities open all over the year. The rest: June to Septembre
- Staff in 2009: 49% in municipalities, Tourism Organisation: 14%, private business: 19%
- Private management 2009: **19% sold 37%** of the tickets
- Tickets 2005-2009: +17,3%
- Tickets sold **2009-2012: -62,2%**
- Owner: the state; distributor must be different from user

Tickets per Region (Source: EKKE 2013)

Region	2005	2009	2012
Eastern Macedonia-Thrace	118.801	112.212	49.791
Central Macedonia	484.624	724.054	440.054
West Macedonia	550	21.000	1.264
Epirus	42.936	46.189	6.860
Thessaly	88.693	98.474	35.590
Western Greece	113.328	110.276	25.252
Central Greece	740.508	771.698	130.443
Attica	227.549	228.441	111.354
Peloponnes	65.592	67.852	29.276
North Aegaean	87.986	128.166	40.271
South Aegaean	8.601	14.912	5.442
ALL:	**1.979.168**	**2.323.274**	**875.597**
		+17,30%	**-62,20%**

The Crisis and the International Market

- What caused the heavy losses? Concentration on the **national market, on national insurance funds**
- New market leader: Central Macedonia
- **Municipalities** win shares (2012): 65% of tickets
- **Trends:** Daily tours, group baths, wellness
- Law 3498/2006 – new framework, but approvals with delay
- Spa´s **unknown** internationally

- *Sources: National Center for Social Research (EKKE); Insitute of Geology & Mineral Exploitation (IGME); Zisis Angelidis; Hellenic Association Of Municipalities With Thermal Springs*

5 Theses

1. Good preconditions for development: **rich natural mineral resources**; magic places
2. The concentration on the **national market** is the reason for the catastrophy of the crisis-years. New profile, new markets to survive
3. New European competition: In search for quick, qualitative **national certification**
4. Incentives for investors: More freedom, more resources for disposal, more flexibility
5. Need for a new profile **on a regional level**. Directive 2011/24 is not enough