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Gestão do Turismo

Health and wellness tourism in the
European context - supply and demand
trends

Paulo André Ferreira Neto

10/2022

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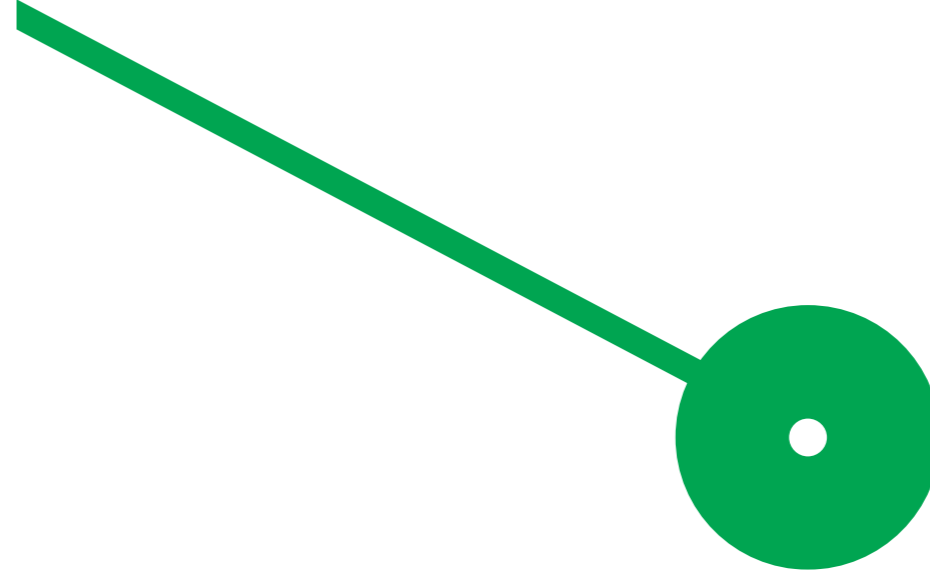
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Escola Superior de Hotelaria e Turismo

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demand trends**

Dissertação de Mestrado

Mestrado em Gestão do Turismo

Orientação:

Prof.^a Doutora Dália Filipa Veloso de Azevedo Liberato

Prof.^a Doutora Joana Alegria Ferreira da Silva Quintela

Vila do Conde, outubro de 2022

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“Tudo o que um sonho precisa para ser realizado é alguém que acredite que ele possa ser realizado” by Roberto Shinyashiki

RESUMO ANALÍTICO

Nas últimas décadas, a saúde e o bem-estar tornaram-se motivos importantes para o consumo, atraindo o interesse de investigadores de diferentes áreas disciplinares. No entanto, um dos desafios da atualidade no âmbito da investigação académica e na indústria do turismo de bem-estar, é o desenvolvimento concetual relacionado com o termo chave wellness. Nos últimos anos, na Europa, o termalismo clássico, focado essencialmente na dimensão 'cura', tem sido substituído pelo termalismo moderno que assenta particularmente na dimensão do 'bem-estar', estando a oferta mais vocacionada para motivações terapêuticas de carácter preventivo, aliadas às vertentes lúdicas e turísticas. Seguindo essa tendência, as estâncias termais começam a recuperar algum dinamismo apostando numa oferta diversificada, que não só considera os pressupostos terapêuticos como também uma perspetiva holística, que inclui simultaneamente os pressupostos de saúde e bem-estar.

A presente dissertação visa analisar os principais destinos europeus termais de forma a traçar o perfil da procura e os principais desafios deste setor, também prejudicado pela recente pandemia mundial. O principal objetivo deste trabalho é explorar a transformação e evolução do conceito de Turismo Termal na vertente wellness, e perceber a sua importância na atualidade. Por forma a responder a este objetivo, considerou-se adequada uma metodologia numa abordagem qualitativa com recurso a entrevistas semiestruturadas.

Nas principais conclusões, é possível destacar, uma mudança no perfil do consumidor na Europa, que caminha em direção numa procura mais jovem, com serviços mais especializados focados no bem-estar físico e psicológico. O impacto da Covid-19 veio confirmar a necessidade de reavaliar os produtos e serviços, com ofertas que combinam a natureza, o desporto, a nutrição, entre outros. A importância das parcerias e da modernização dos serviços, surge para oferecer mais oportunidades para os consumidores desfrutarem de uma experiência de melhor qualidade, com outras opções, para além das chamadas "clássicas". Atualmente o termalismo assenta particularmente numa vertente mais direcionada para o bem-estar, com profissionais cada vez mais qualificados de diversas áreas, desde nutrição, desporto, psicologia, entre outros.

As principais limitações destacadas no presente estudo relacionam-se com os escassos estudos na área, a nível nacional e internacional, e a dimensão geográfica do mesmo.

Para futuras investigações, sugere-se a continuação do presente estudo, explorando outras perspectivas, utilizando outras abordagens metodológicas, ou mesmo a aplicação a outros destinos.

Palavras-chave: Bem-estar; Termalismo; Europa; Perspetiva Holística; Covid-19.

ABSTRACT

In recent decades, health and wellness have become important motives for consumption, attracting the interest of researchers from different disciplines. However, one of the current challenges in academic research and in the wellness tourism industry is the conceptual development related to the key term wellness. In recent years in Europe, classical thermalism, focused essentially on the 'cure' dimension, has been replaced by modern thermalism, which is particularly based on the 'wellness' dimension, and the offer is more focused on preventive therapeutic motivations, combined with recreational and tourism aspects. Following this trend, spas are starting to regain some dynamism in betting on a diversified offer, which not only considers the therapeutic assumptions but also a holistic perspective, which simultaneously includes the assumptions of health and wellness.

This dissertation aims to analyze the main European thermal destinations in order to trace the demand profile and the main challenges of this sector, also characterized by the recent global pandemic. The main goal of this work is to explore the transformation and evolution of the concept of Thermal Tourism in the wellness area, and to understand its importance today. In order to meet this objective, a qualitative approach methodology was used, using semi-structured interviews.

In the main conclusions, it is possible to highlight a change in the consumer profile in Europe, which is moving towards a younger demand, with more specialized services focused on physical and psychological well-being. The impact of Covid-19 confirmed the need to re-evaluate products and services, with offers that combine nature, sports, and nutrition, among others. The importance of partnerships and modernization of services, arises to combat the usual treatments of thermal waters and offer more opportunities for consumers to enjoy a better-quality experience, with other options, beyond the so-called "classic" ones. Currently, thermalism is based particularly on a more directed aspect to well-being, with increasingly qualified professionals from different areas, such as nutrition, sports, psychology, among others.

The main limitations highlighted in the present study relate to the scarce studies in the area, nationally and internationally, and the geographical dimension of the study.

For future research, is suggested the continuation of this study, exploring other perspectives, using other methodological approaches, or even applying it to other tourism destinations.

Keywords: Wellness; Thermalism; Europe; Holistic Perspective; Covid-19.

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List of abbreviations

DGEG – Direção Geral de energia e Geologia

ETC – European Travel Commission

GWI – Global Wellness Institute

UNWTO – United Nations World Tourism Organization

ANBAL – Asociación Nacional de Balnearios

ENIT – Agenzia Nazionale del Turismo

CCSA – Committee for the Coordination of Statistical Activities

0 - INTRODUÇÃO

This dissertation was developed in the scope of the Master in Tourism Management at School of Hospitality and Tourism of the Polytechnic Institute of Porto. The general objective of this study is to explore the transformation and evolution of thermal tourism in the area of wellness.

This dissertation intends to be an impulse for the development of further studies in this sector, which are still few. The choice for this theme arises from the fact that it is a sensitive area of study, with a focus on wellness, and that currently has gained increasing importance by the whole community, which seeks services or products to improve their quality of life, whether physical or psychological.

In recent decades, health and wellness have become important motives for consumption, attracting the interest of researchers from different disciplines. However, one of the current challenges in academic research and in the wellness tourism industry is the conceptual development related to the key term wellness.

Health and Tourism are two concepts that have long held a significant place in the lives of populations (Kervankiran, 2016). Tourism plays a key role in economic development, being one of the largest sectors worldwide in terms of turnover. Consequently, health tourism is considered a strategic product that remains at the bottom of the hierarchy of vacation destinations. As time went by, several indigenous thermal cultures grew up, and Europe has one of the richest and most documented territories where thermal springs proliferate, the use of which started in the Greek and Roman cultures, being part of their daily routine.

In recent years, in Europe, the classical thermalism, focused essentially on the 'cure' dimension, has been replaced by modern thermalism, which is particularly based on the 'well-being' dimension, and the offer is more focused on therapeutic motivations of preventive nature, combined with recreational and tourist aspects. Following this trend, spas are starting to regain some dynamism in the betting on a diversified offer, which not only considers the therapeutic assumptions but also a

holistic perspective, which simultaneously includes the assumptions of health and wellness.

Recently, the tourism history has been shaped by a worldwide health crisis in 2020, the Covid-19 pandemic, which led to a global economic crisis with strong consequences for the Tourism industry. To combat and decrease the contagion, several measures were adopted, such as social isolation, which had a significant impact on people's lives, contributing to financial, psychological and family imbalance (Corbari & Grimm, 2020). During the pandemic, fear intensified stress and anxiety levels in healthy people and also increased the symptoms of those with pre-existing mental disorders, having motivated the search for health and wellness sites (Oliveira et al., 2020).

Wellness is at the moment one of the new trends, not only in health tourism, but also in modern tourism. It is defined as a "state of complete physical, mental and social well-being and includes attitudes and actions that prevent diseases, improve health and quality of life, and lead to physical and mental balance" (Šušić & Dimitrijević, 2015). The concept of "wellness" - and the philosophy of wellness was first developed by American physician Halbert Dunn in 1959, when he first wrote about a special state of health that comprises "an overall feeling of well-being and which sees man as consisting of body, spirit and mind and being dependent on his environment" cited by (Mueller & Kaufmann, 2001).

Regarding the structure of the dissertation, it is divided into 8 chapters.

The first chapter contextualizes historically the evolution of thermal tourism.

The second chapter focuses on the concept of thermal tourism, and then an analysis of the study countries.

The third and fourth chapters address the conceptual framework around thermalism and health tourism.

The fifth chapter presents the sector's panorama due to the most recent pandemic, covid-19.

In the sixth chapter, a benchmarking analysis is carried out in order to better understand the offer of each destination under study.

In the seventh and eighth chapters, the research objectives, methods, data analysis and discussion of results are presented.

Finally, the conclusion follows the most relevant final conclusions of the study, its limitations and suggestions for future researchers in the area are presented.

1. Historical journey of Thermalism

Biological life arises from water, and man has always found water to be a source of sustenance and well-being (Millennium Ecosystem Assessment, 2005). In Greek and Roman world, soaking in hot springs or enjoying the warmth of steam was a much sought-after and somewhat "magical" practice (Masetti, 2011).

Nowadays water is not only the main constituent of a living being, but also a symbolic and culturally valuable object that over the years has been an important resource for civilizations. Since ancient times, Babylonians, Greeks, and Romans believed that the rivers, springs, and seas of the Mediterranean basin were controlled by gods, and that water represented for them a symbol of power, prestige, purity, and piety. The hot springs have been a topic of discussion and interest due to their therapeutic qualities, with baths being not only a hygiene measure but above all a means of maintaining and restoring health (Dvorjetski, 2007).

Water has always been important for mankind and has always had a different meaning, for example, in Christian rituals it is used for baptism and ablutions but in Islamic culture the water from the Well of Zamzam is considered sacred and moreover, Muslims are required to bathe or wash five times a day, before each of their daily prayers. (Rawlinson & Heap, 2017).

The history of public baths begins in Greece in the sixth century BC, associated with practices related to beauty and body care. For the Greeks, such practice was related not only to physical relaxation after muscular effort, but also to a permanent search for balance between body and mind (Duminil, 1982). Hot water and steam baths, part of the Greek baths, were used more by philosophers and intellectuals, and people of greater economic power, while cold baths were associated with sports or the training of soldiers where virtues were recognized in the stamina and temper of warriors and soldiers (Ramos, 2005).

From the IV century B.C. on, the first heated baths appeared through the circulation of hot air under the ground, in places of social interaction and physical and mental relaxation, with the main concerns being comfort, well-being and leisure. For the

Greeks, the dominant concern was the pleasure in aesthetic of a beautiful, slender body associated with the feeling of fitness (Bonnevillie cited by Ramos, 2005).

Known as the "father of medicine" Hippocrates, the great physician of ancient Greece, developed the conceptual basis of the use of therapeutic springs, rich in healing properties, and where the Romans later built splendid spas on the sites of the hot springs, and virtually all European spas, which were built on his remains and after each conquest.

It can be said that it was the Greeks who developed the empirical knowledge of the healing virtues of mineral waters, as well as establishing rules for their use.

From the Greek baths, the Romans took the pleasure of physical fitness and conviviality, surrounded by scenarios characterized by monumentality and luxury of the baths, with spaces characterized by domes of enormous height, architectural symbols of the Roman Empire still present today (Ramos, 2005).

The emperors of Rome had as a great goal, to provide Rome and its entire empire with new and rich thermal establishments. These establishments testified to the ostentation of the Roman Empire and provided its warriors with the necessary recovery and physical regeneration after their conquests, and its inhabitants with relaxation and pleasure at the same time (Debergh, 1994).

The cities, but especially the Roman cities had a good water supply network, through aqueducts, and made it possible for baths, healing spas, and hot springs to be available, in one way or another, to babies, women, peasants, nobles, Christians, and Muslims (Kosso & Scott, 2009).

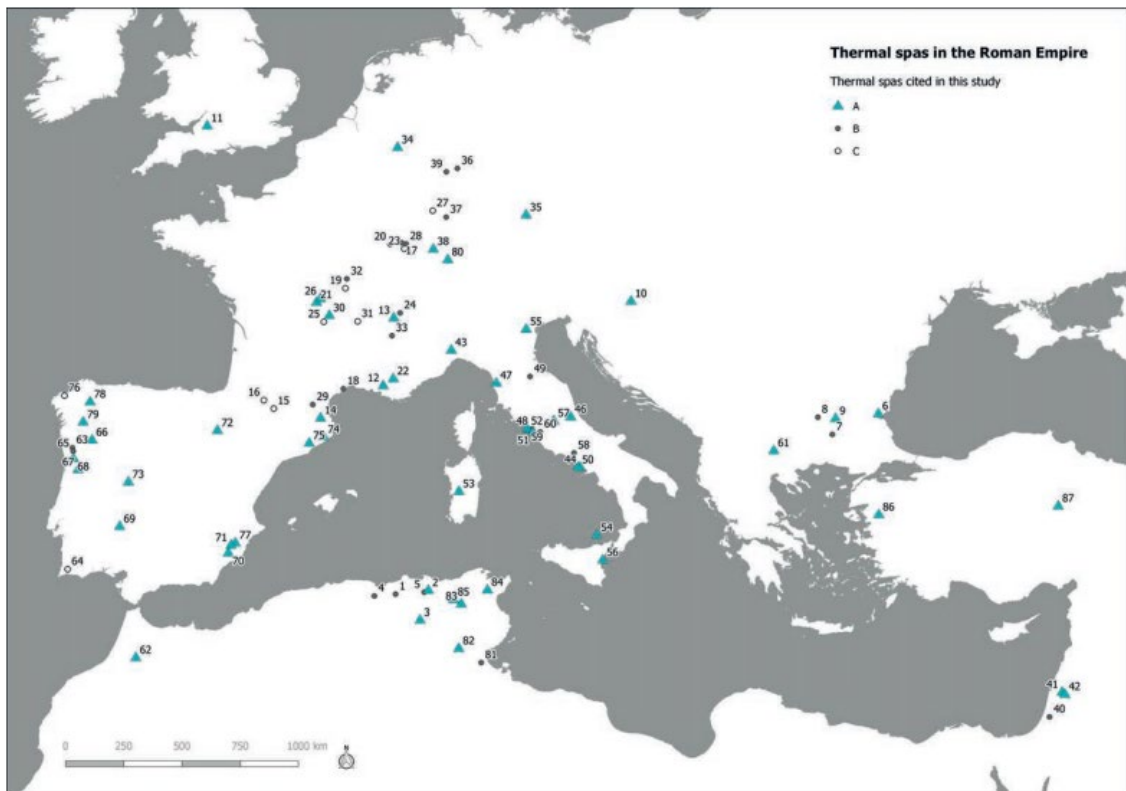
The Romans were fascinated by the way the Greeks used water for therapeutic purposes. However, in Rome exists three different types of baths that were developed: home baths (*balnea*), private baths (*balnea privata*) and public baths (*balnea publica*) (Rawlinson & Heap, 2017).

The Roman Empire influenced all the European civilizations building public baths from England to Eastern Europe. They were important buildings in society, because

at that time there were a concern for the diffusion and accessibility of culture (Carriço, 2013).

Throughout the empire there was an uneven distribution of thermal complexes as the following map (Figure 1) reveals. Usually these buildings were located in areas with the technical capacity to adapt architecture to hydrology and which had water sources nearby (González Soutelo, 2019).

Figure 1- Distribution of thermal spas in the Roman Empire



Source: : González Soutelo, 2019

Hydrotherapy eventually became part of Roman medicine, where certain methods of applying mineral water in different types of baths were believed to result in therapeutic cures (Allen, 1998).

Initially only for men, baths have always existed in Roman life being places for socializing, political discussion and where even the leading entrepreneurs transacted business. The first baths for both men and women were in private establishments and were referred to and known as *Balneum*, in Roman vocabulary.

Exclusively for the use of citizens with greater financial power, the baths were private to less financially well-off citizens of the time, as the poor, who had less knowledge of business, did not mix with the wealthy patrons. These baths developed rapidly as did the Roman Empire, and this evolution meant that these places of relaxation experimented with new designs in places with imposing architectural forms (Rotherham, 2012).

With the fall of the Roman Empire in 476, the baths began to fall into disuse, and with the rise and expansion of Christianity, they were eventually banned. These events led to many of these places being abandoned, while others were adapted and converted into churches. This period of decadence lasted a few centuries, and from the 13th century onwards the popularity of bathing began to rise again due to the influence of the Moors in Southern Europe. *“Having a bathing culture dating back to pre-Roman Celtic times, Hungary is one of the richest thermal water countries in the world”* (Rawlinson & Heap, 2017).

It is from the 15th century, with the Italian Renaissance, that there is a greater intellectual openness that influenced all neighboring countries. The increase in travel amongst the upper and middle classes in Europe made cultures and experiences roam and in this context the elites cultivated the habit of making the "tours" between the most notorious and famous thermal stations of the time, and at the same time admiring foreign landscapes and habits (Ramos, 2005).

In the 17th and 18th centuries the idea of bathing began to emerge again and attitudes to this concern for health but especially hygiene began to change. New ideas and new theories of health emerged, focusing more on cold water cures and the properties of healing mineral spas, as well as the consumption of these waters. The Roman bathing culture for over a thousand years was not surpassed or equaled even after the fall of the empire, however, the association of bathing with Roman civilization remained very strong. In early Western societies, in the 1700s to 1800s, many physicians advocated that a healthy diet and lifestyle were crucial to cure and prevent disease, with bathing being central pillars in pseudo-medicine. In the United States, the popularity of bath treatments grew in the 1940s and 1950s and has enjoyed an evolution to the present day. (Rotherham, 2012)

Nowadays the classical model of thermalism, that we have been following since ancient Greece has disappeared, largely due to the countries that started to include thermalism in their health services. According to Israelowich (2015) “*some of the largest spas included educational spaces such as libraries, lecture theatres, and public areas where works of art were displayed.*” Its long history shows that thermalism has undergone development, becoming a commercialized product and a deeply established socio-cultural habit in the European community (Tzedopoulos et al., 2018).

However, it is worth mentioning, that nowadays it has lost strength due to medical science, which has created better, consistent and faster therapies, which have been replacing mineral waters. (Keyes, 1998 cited by Tzedopoulos et al., 2018). With the new technologies, the health tourism sector has been revolutionizing its services by offering greater specialization. Spas have thus been able to provide higher quality to all travelers who want to improve their well-being (Gómez Pérez et al., 2019; Tzedopoulos et al., 2018).

This research becomes fundamental to then explore this transformation and evolution that the concept of thermalism represents today, with a greater focus on the area of wellness. It is possible to observe that "modern" Thermalism has led to a decrease in elderly visitors, however, the younger community is increasingly attracted by wellness services, which seek to establish a harmony and care between body and mind, topics widely discussed today (Tzedopoulos et al., 2018).

2. Thermalism concept

The concept Thermalism, which derives from the Roman word "Thermae" has been used by mankind for 2000 years, and can be used to describe a set of relaxation, bathing and social activities where water proves to be an indispensable natural resource (*Britannica*, 2021).

Over time, different perspectives of this concept have emerged and, according to Stevens et al. (2018) Thermalism can be defined as the use of springs, rivers or sea water at certain temperatures for exclusive medicinal use, being one of the oldest practices in Europe. For other authors, Thermalism is also considered the study of water for therapeutic purposes due to its temperature or chemical composition (Rodríguez-Sánchez, 2017). In the opinion of Miranda and Vieira (2021), - Thermalism explores different ways of using mineral water with the aim of providing treatments for the body, applying techniques with immersion baths, saunas, inalo therapy among others. However, in the view of Bandejas (2019) for there to be thermal tourism it is deduced the existence of a thermal spring and its exploration is determined for medicinal or therapeutic purposes.

In this regard, Hellmann and Drago (2018) affirm that the therapeutic use of water can have different names, varying with the type of water and the temperature used, which can include thermalism, crenotherapy, thalassotherapy, balneotherapy, among others.

Over the years this concept has undergone changes, and according to the study by Pereira et al. (2021), which approaches Thermalism as a determinant for quality of life and sleep, nowadays it is not only associated with a therapeutic component, referring that it then comprises a more preventive approach aimed at health promotion and prevention of future diseases. The scientific development on the healing powers of thermal waters has been contributing to a greater dissemination of this concept and the most recent literature identifies the potential that Thermalism has for improving individual well-being, but also that of local communities (Bandejas, 2019; Pereira et al., 2021).

The current development of the concept does not only judge therapeutic efficiency, as a means of prevention and contrasting lifestyles, but favors the preservation of

health and well-being and associated benefits, such as, the relief of stress, depression, and even recovery of energy. The market trend has been demanding the practice in times of economic and social stagnation (Pereira et al., 2021; Solimene, 2020).

In the study of Rocha and Brandão (2014) conducted in Portugal with 20 thermal institutions, it was possible to distinguish two distinct thermalism segments, classic thermalism and wellness thermalism. The first segment was defined as that which represented an offer organized to satisfy a sought-after motivation based on identified pathologies or recoveries, with a merely therapeutic objective while the second segment was defined as that in which the offer was aimed at clients where the main motivation sought was leisure, tourism or therapeutic recreation. As described by Gianfaldoni et al. (2017) one of the great innovations in the concept was the extraordinary connection of the classical concept to the concept of wellness with the ever-increasing activities in this new spa tourism.

This approach of distinct terms has led to the development of different associations to the activities practiced in thermal water areas and spas. In some countries like Portugal, the term "Thermalism" is the most used while balneotherapy, which ends up being a synonym, is more used in countries like Germany, however, there are different modalities and uses of water, such as Thalassotherapy. Although there are similarities in the techniques, thermalism/balneotherapy uses mineral-medicinal waters for its treatments, while Thalassotherapy uses seawater or normal waters (Hellmann & Drago, 2018; Munteanu & Munteanu, 2019; Río-Rama et al., 2018).

Nowadays, with the new demands of the market and lifestyles, thermal tourism has adapted to the interests of the communities, developing new treatments and techniques as well as investing in thermal infrastructures. Today it represents a "duality between health and leisure", with a restructuring of the classic thermalism according to the trends and current needs of the demand. Despite the prominence that Thermalism has been gaining, it should be recognized that it is traditionally a geological resource of well-being and should not be marketed as a commodity directed to rich markets of society (Bandeiras, 2019).

2.1- Thermalism in Europe

Thermalism has, over the past few years, been increasingly recognized for the healing properties of its waters and the important role in disease prevention, whereby, thermalism as a tourist activity has on an international scale, positively boosted the economies of the countries of the world. In the international context, countries such as Japan, New Zealand, Turkey, France, Spain, Greece, Tunisia, Italy, Germany, Iceland, Czech Republic, Hungary and Portugal are some of those with a stronger tradition of using mineral waters for the treatment of various pathologies (Costa, 2020).

Currently it is estimated that there are about 34,099 in the world thermal/mineral springs establishments operating in 130 countries, with revenues at \$64.0 billion in 2019 and \$39.1 in 2017 (GWI, 2021). From the XXI century, mainly in Europe, the thermalism suffers a particular attention in Tourism, and the resolution of the European Parliament of November 29, 2007, that mentions in one of its chapters the thermal tourism, and recommends the "use of European programs to promote thermal tourism and stresses the relevance of cross-border cooperation in the definition of financing solutions for this tourism product" (Gonçalves et al., 2019).

In 2011 it undergoes an update, with the publication of the Parliament Resolution of September 27, and a new policy framework for Tourism in Europe is defined, which states and recognizes that due to "demographic developments in Europe, health tourism will show growth in health tourism, in particular spa tourism" (Gonçalves et al., 2019). In Europe, Hungary stands out as one of the richest countries in the world in water resources. Budapest is known as the city of SPAs, with spas dating back to the 16th and 17th centuries, and Italy currently has 380 spas, with activities that are important for the health and well-being of its citizens (Costa, 2020).

According to the study conducted by the Global Wellness Institute in December 2021, the thermalism sector showed strong growth between 2017-2019, with an annual growth of 6.8%. In 2020, with the appearance of the Covid-19 pandemic in the world, with strong impacts on economies, the industry suffered a decline in revenues, but has been trying to recover over the last few years. Before 2020, the sector showed a rapid and strong growth, with investments in many countries,

since this market segment increasingly looks for nature, moments of relaxation, and the demand for rehabilitation activities, healing of diseases among others. In the same study, it is also mentioned that during the years prior to the pandemic, about 115 new spaces were opened, and that during the pandemic year 17 spaces were opened regardless of the crisis that was being experienced. Currently new projects have appeared that aim to influence the growth of this sector.

Table 1- The global thermal/mineral springs market in US\$ on the different continents

Thermal/Mineral Springs Market				Average Annual Growth Rate		
(US\$ Billions)			<i>Per Capita 2020</i>	2017-2019	2019-2020	
2017	2019	2020				
\$31.60	\$36.76	\$22.70	\$5.44	7.9%	-38.2%	Asia-Pacific
\$21.76	\$24.19	\$14.66	\$15.87	5.4%	-39.4%	Europe
\$1.52	\$1.60	\$0.82	\$1.25	2.7%	-49.0%	Latin America-Caribbean
\$0.73	\$0.91	\$0.67	\$1.84	11.6%	-25.6%	North America
\$0.41	\$0.41	\$0.17	\$0.33	0.6%	-59.5%	Middle East-North Africa
\$0.08	\$0.09	\$0.04	\$0.04	1.9%	-49.1%	Sub-Saharan Africa
\$56.10	\$63.96	\$39.07	\$5.04	6.8%	-38.9%	WORLD

Source: Adapted from the study by *Global Wellness Economy* (GWI), 2021.

Due to data collected by the Global Wellness Institute, the Asian and European continents lead in revenue, which reflects centuries of history of hot springs use. Once again, the impact of covid-19 has influenced markets and tourism, generating a significant drop in revenues, as we can see in the table, which represents the situation worldwide.

Table 2- Number of Thermal/Mineral Springs by continent

Number of Thermal/Mineral Springs Establishments			
2017	2019	2020	
25,916	25,950	25,952	Asia-Pacific
5,967	6,198	6,188	Europe
1,096	1,127	1,128	Latin America-Caribbean
302	336	337	North America
416	432	432	Middle East-North Africa
50	62	62	Sub-Saharan Africa
33,747	34,105	34,099	WORLD

Source: Adapted from the study by *Global Wellness Economy* (GWI), 2021.

The hot springs industry is heavily concentrated in Asia and Europe, accounting for more than 90% of all establishments worldwide. In recent years there has been an increase in the number of establishments, which demonstrates the importance of this sector as well as the demand for it, with a small decline in 2020, caused by the pandemic crisis. Following the GWI report, Europe experienced a “*catastrophic year and possible industry bankruptcy due to prolonged closures and insufficient government aid for the sector, and saw their markets decimated by temporary or prolonged business shutdowns, stay-at-home orders and travel restrictions*”. Currently what many countries have been doing is offering vouchers to citizens to boost a sector, which like many others, has suffered from this crisis.

In Europe, according to the World Wellness Institute (2019), you can identify the TOP 10 spa establishments for the year 2017:

1. Germany;
2. Russia;
3. Italy;
4. Austria;
5. Hungary;
6. Spain;

7. Poland;
8. Turkey;
9. Czech Republic;
10. France.

Through this analysis, it was possible to determine and select the countries that would be an added value for this study. Considering the association that exists between the Roman Baths and some European countries, it was determinant the selection of countries that shared a cultural history around the ancient thermalism, very associated to Greece and Italy. As such, 5 European countries shared this same history, such as Portugal, Spain, Italy, France and finally Hungary.

All these mentioned countries are currently the biggest markets in Europe, with more and more investments in the area, with services directed to wellness.

2.2- Thermalism in Portugal

Portugal is a country rich in archaeological and hydrographic natural heritage with richly mineralized water networks (Gonçalves et al., 2019). According to Accioaiouli (1952) and Carriço (2013) cited by Sousa (2021), the country faced six different periods of Thermalism: the pre-Roman period, the Lusitanian-Roman (5th century), the post-Roman (8th century), the Arab (12th century), the Portuguese pre-legislation (1143-1891) and finally the Portuguese post-legislation (1892 to the present day).

The exploration of these spaces linked to health and leisure has been growing over time, and it was in the 90's that wellness tourism started to be understood as a whole, thus discarding once and for all the prejudice linked to the spas, which was only about healing (Gonçalves et al., 2019). It was then, in 2004, that the Portuguese Thermalism suffers a legal revolution, with the creation of the law-decree nº142/2004, that updates "the licensing procedures, organization, operation and supervision of thermal installations", substituting the old legislation that dated from 1928. For the first time Thermalism gains importance for tourism, with tourism and leisure activities, not only associated with the health sector. There was in fact a "clear objective in giving the thermal establishments the power to develop a diversified offer, boosting in a more effective way health, well-being and tourism" (Gonçalves et al., 2019; Peris-Ortiz & Álvarez-García, 2015).

With the appearance of the National Strategic Plan for Tourism (PENT) in mid-2005, which came to define Portugal's strategic products, health and wellness tourism was elected as one of the ten products of interest to the sector, which reflected a significant growth of this market (Almeida, 2021; Gonçalves et al., 2019).

Nowadays spas are very popular due to their healing properties, and are usually located in places with a small urban dimension, usually in the inland region of continental Portugal (Leite et al., 2021).

On map 1 we can observe the spas that are currently active in continental Portugal, mostly in the interior.

Figure 2- Location of mineral waters in Portugal

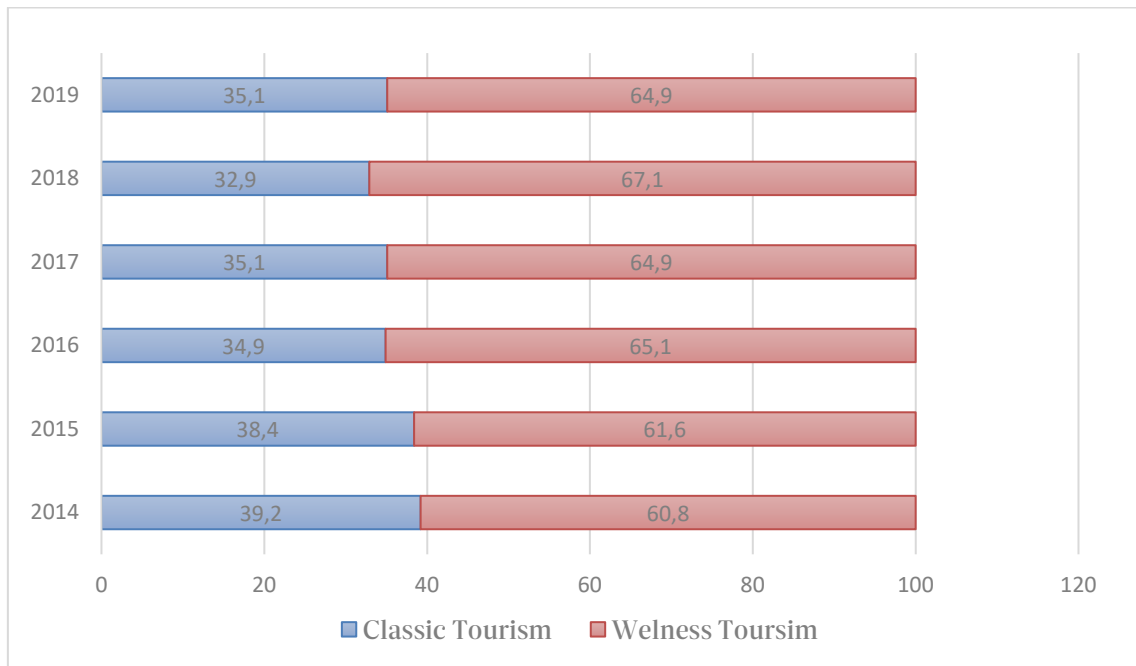


Source: Direção Geral de energia e Geologia (DGEG), 2021

According to the Directorate General of Energy and Geology (DGEG), in 2021, there were about 45 spas in operation, of which 38 were in northern Portugal. “The Portuguese Spa Association (ATP) estimates that this activity is responsible for about 1,500 direct jobs and about 9,000 indirect jobs” (Costa, 2020).

Over the years, the market share of the two strands of Thermalism, classic and wellness, has shown stability in the distribution of thermal demand for the years 2014 to 2019, according to the General Directorate of Energy and Geology (DGEG), as we can see in Graph 1 (Almeida, 2021).

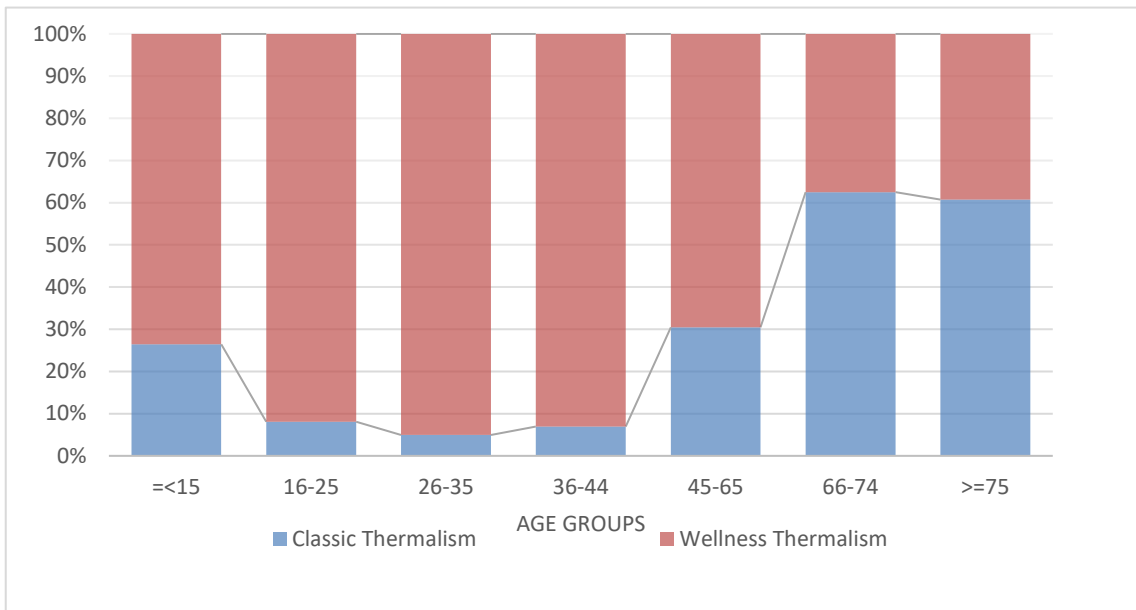
Graph 1-Distribution of Thermal demand between 2014-2019.



Source: Adapted from Direção Geral de energia e Geologia (DGEG), 2021

In Portugal the demand for thermal spaces has been increasing, especially in young age groups, as we can see in graph 2. Programs associated with aesthetics and wellness, cultural and recreational activities as well as physical and psychological wellness programs arise in the lives of younger populations that nowadays are more concerned with health at an earlier stage of their lives (Branco, 2019).

Graph 2- Demand for Thermal spaces by age groups



Source: Adapted from Direção Geral de energia e Geologia ((DGEG, 2022)1

2.3- Thermalism in Spain

Spain, like all of Europe, has a tradition that goes back to pre-Roman times, with strong Roman and Muslim assimilations, only strongly re-emerging in the mid-18th century. The middle of the 18th century saw Spain promoted by the Enlightenment, as well as by the travels and spread of British Grand Tour tourism that allowed new perspectives of travel to new places. These trips allowed for a better understanding of the therapeutic properties of the spa waters, thus replacing medicine with thermal healing. Thus began the attraction for spa healing spaces, with hydrotherapy at the center of many disease solutions (Alonso-Álvarez, 2012). In Spain, thermal spas are considered those with mineral-medicinal waters declared of public utility due to their therapeutic properties (Maroto Martos et al., 2012 cited by Pinos Navarrete et al., 2020) and today are the countless ones spread throughout the country, as we can see in figure 3.

Figure 3- Distribution of Spas in SPAIN



Source: Adapted from ANBAL 2022.

As we can observe, Spain has several spas spread throughout the country and with different characteristics, depending on the area where they are located. In general, more spas are found in the north than in the south, with the most relevant cities in the north being Ourense (3) and Zaragoza (1), and in the south, Granada (2). Currently Spain accounts for 52 thermal spaces.

The Spanish spas are currently incorporating new offers of activities, related to relaxation, wellness, among others (Pinos Navarrete et al., 2020). It is a country that attracts thousands of tourists every year, due to its year-round abundance of gastronomy, flora, fauna, and landscapes that make it one of the world's top destinations, thus favoring a great advantage for health tourism (Macías, 2020).

One of the advantages also for health tourism in Spain, is the Institute of Major and Social Services (IMSERSO), which is an agency of the Spanish security system responsible for managing social services for the elderly. One of many services available is to include stays in spas for the elderly to try to provide a better quality of life, and this social spa program is supported by the Spanish government. So, all retirees and sick people have the opportunity to medical treatments and enjoy leisure activities at a lower cost. The current global boom in health care has led many destinations and companies to specialize in health tourism, also to combat seasonality in some regions. The increasingly aging population boosts health services and the demand for these activities, but nevertheless, due to this program many spas in Spain have already tried to reduce their dependence in order to attract other segments of tourists and reduce the association that spa spaces have of being spaces with old and sick people (Anaya-Aguilar et al., 2021b).

The current context of the covid-19 pandemic was an opportunity to open new paths and create new objectives. Health tourism in Spanish society has faced and still faces a great challenge, the approach of younger people to this sector of spa tourism. Many Spanish spas, during the pandemic crisis, developed initiatives that supported all customers, thus maintaining contact with those who are part of their daily lives, thus demonstrating the importance that this sector will have in the recovery of covid patients in the coming years (Pinos Navarrete & Shaw, 2021).

2.4- Thermalism in Italy

In Italy, Thermalism is the oldest form of health tourism, which has accompanied generations since the early Roman Empire, which saw the growth of this practice there (Ivona et al., 2019). Due to its geological characteristics, rich in volcanic rocks and water springs with unique properties, Italy is one of the European countries with the largest number of thermal establishments, and one of the most popular destinations as far as the thermal sector is concerned (Manna et al., 2020).

In the Mediterranean, the use of thermal water for therapeutic purposes, is known as an antique, having the whole culture of the world valued the symbolism that water represents, with its healing power. It was from Greece that "hydrotherapy spread throughout the Roman Empire", representing at the time an important social habit, with the capital of the empire having more than 800 dedicated spaces, which makes Italy and its cities the birthplace of thermal tourism, with unique places classified as World Heritage. Thermal tourism thus inherits the presence of numerous spas, located in natural geographical spaces (Cinti, 2021).

Figure 4- Distribution of Thermal facilities in Italy



Source: Faroldi et al. (2019)

In 2017, according to Quirino (2018) cited by Migliaccio (2018), in Italy there were about 388 spas, of which 377 were active, located in 194 municipalities. In figure 4 it is possible to see the location of most of the thermal spaces. From it, we can observe a uniform distribution along the Italian territory.

Spas have now become an integral part of the regions and play an important role in their economies. The sector is characterized by an increasingly assimilated trend, with a decrease in traditional activity for an increasingly significant in wellness. In this sense, the Italian law 323 of 2000, which is related to the thermal reorganization, came to define the terms as "care" and "well-being" as well as to regulate the thermal service offers to valorize the hydrothermal patrimony (Ivona et al., 2019).

Table 3- Availability of accommodation by tourism product

Tourism Product	January		February		March	
	2022	2021	2022	2021	2022	2021
Mountain	33,2%	55,4%	19,7%	41,6%	12,6%	62,9%
Cultural	19,8%	31,5%	12,3%	33,0%	6,8%	33,5%
Balneal	22,5%	23,2%	13,5%	26,6%	7,4%	30,2%
Thermal	33,7%	49,6%	26,9%	46,7%	13,8%	46,1%
Others	19,6%	25,0%	8,2%	19,5%	5,1%	18,9%

Source: Adapted by Insights on tourism trends, ENIT 2022.

According to the data provided in table 3, by the National Agency of Tourism of Italy, it is possible to observe that the thermal tourism product continues to be one of the products that offers more availability of accommodation. However, we can verify that in relation to the months of the previous year, a decrease has been registered, which can mean an increase in the demand for this product.

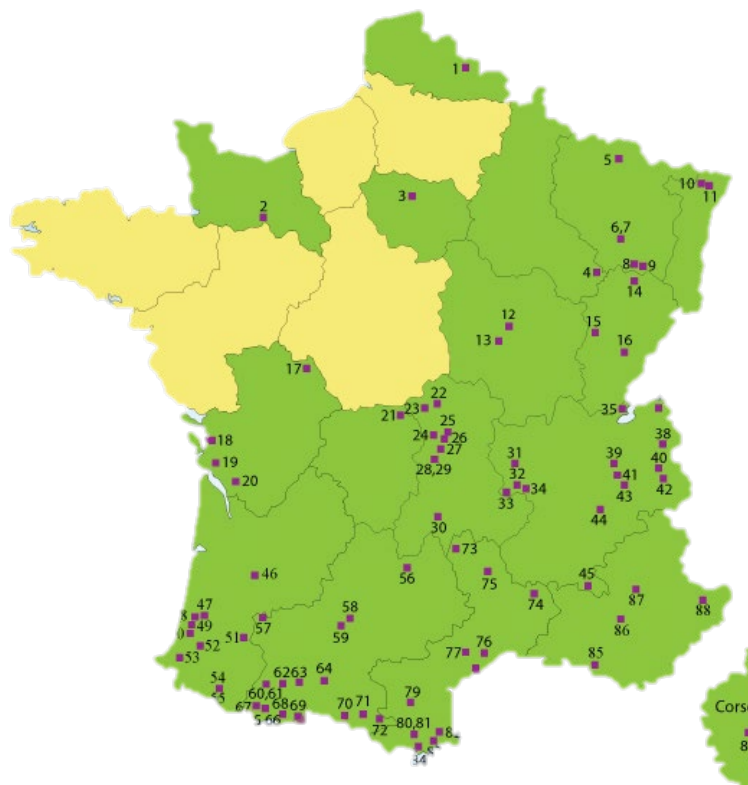
The Global Wellness Institute (GWI) in February 2022, conducted a study on the ranking and position of countries in the world regarding the health tourism sector, and according to this study, Italy comes in 4th place in Europe, with 91.8 billion dollars in revenue, thus demonstrating the importance of this sector for its economy (GWI, 2022).

2.5- Thermalism in France

France, as in most countries of the Roman Empire, has a long tradition and famous historical cities from the Greco-Roman era, with numerous spaces dedicated to thermalism (Anido Freire, 2013). Historically, French thermalism has experienced a succession of various ups and downs, and it was at the end of the Second World War that it became a regulated sector, a more social thermalism reimbursed by social security. From 1947 on, was completely transformed, with thermal cures being assimilated into a therapy, with patients exclusively suffering from chronic illnesses (Jamot 2008, cited by Montargot & Férérol, 2016).

Being a very attractive destination for tourists, France has many water towns, with well-developed hotel and spa infrastructures. As we can see in figure 5, it currently has 89 spas spread around the country, with a higher concentration in the south (Montargot & Férérol, 2016).

Figure 5- Distribution of Thermal places in France



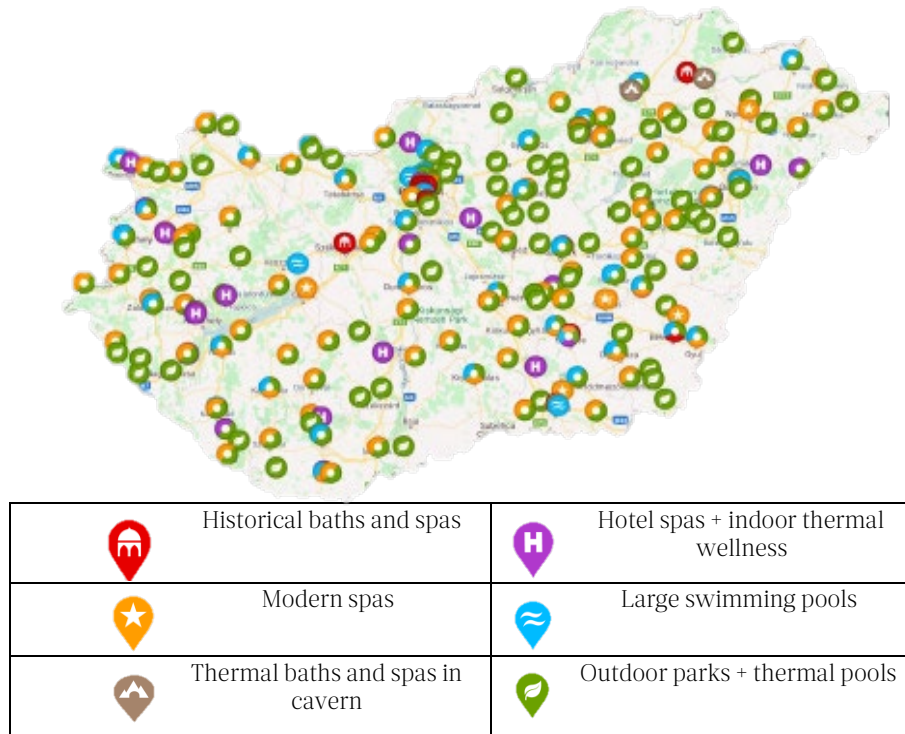
Source: Station thermale en France, 2022

The world travel tourism & council (WTTC, 2017), developed a study on the growth of health tourism, more specifically medical tourism. According to the same data, France appears in 2nd place as one of the countries with the highest revenue in this area.

2.6- Thermalism in Hungary

With a spa culture almost 2000 years old, Hungary is one of the countries in Europe that possesses one of the richest thermal and medical springs, even in the world (Bottoni et al., 2013 cited by Smith, 2021). Budapest, the Hungarian capital, is sometimes called the Spa Capital of the world, due to the natural wealth of its 130 spas, many with a history dating back to the 16th century, when the Turkish occupation influenced the cultures, and the city was even called the "Mecca of Rheumatics" (Smith, 2021). Since the 1960s in Hungary, at the emergence of mass tourism, the country's most important tourism product has been spa/health tourism, being Hungary the 5th most important hot spring destination after Japan, Iceland, Italy and France (Csapó & Marton, 2017). According to the same authors and in their research, about well-being and healing and characteristics of demand for spas in Hungary, there are 529 spas spread across the country, with only 380 in full operation and 149 seasonally, as we can see in the figure 6.

Figure 6- Distribution of thermal Spas in Hungary.



Source: Adapted from Smith (2021)

Health tourism plays a very important role in Hungary's tourism and economy. In 2016 alone, 45% of overnight stays were in places that had spas. Spas in addition to being popular with visitors, are also highly frequented by locals, who benefit from the services provided by these places covered by health insurance. One of the positive points for Hungarian spas is that their mineral waters have medically proven healing properties (Strack & Raffay-Danyi, 2021).

In 2013, Hungary changed its national brand to "Think Hungary - More than expected," with a focus on hot springs and thermal baths. In 2018, the country's newest brand is Wellspring of Wonders (WOW), which again focuses on thermal spaces and health tourism. Despite these brands that have been developed over time, there have also been some changes in cultural traditions, such as having separate baths for men and women, nude baths replaced, always adjusted to the current needs of tourists. One of the measures to attract the younger public (18-25 years old) was the creation of night parties at spas, which are increasingly popular, thus demonstrating the importance of entities to include all age groups in this crucial sector of activity for the country's tourism (Smith et al., 2020).

The development of laws that support tourism, such as the Tourism Development Act, are mainly aimed at defining legislation in the industry, increasing its government revenues, and implementing incentives in regional and rural development. The biggest advantage of wellness tourism lies in the long-term opportunities and benefits, such as the enjoyment of social security-funded rehabilitation treatments and therapies, thus increasing domestic tourism (Zsarnóczy, 2017).

Every year the number of visits to Hungarian spas is around 40 million, demonstrating the importance of the health tourism sector, and in the TOP10 of the most visited places you can always find 7 or 8 spas cities. Nowadays, health tourism has become a priority and more and more SPAS are oriented with wellness services. Hungary has taken advantage of its resources by promoting them, and even the country has been promoted as the "Land of Spas" or the "city of baths" (Csapó & Marton, 2017; Marton et al., 2019; Strack & Raffay-Danyi, 2021).

3. The concept of Health and Wellness Tourism

“Health tourism is considered nowadays to be an emerging, global, complex and rapidly changing segment that needs to be comprehended to a greater extent in order to leverage opportunities and better address challenges” (UNWTO & ETC, 2018).

In recent years health and wellness has increasingly gained prominence and relevance in many global and emerging destinations where the association with the tourism sector has grown and recognized one of the most important strategic products, Health Tourism, which due to various economic and social circumstances has led people to achieve a better quality of life (Quintela et al., 2016).

This rapid growth is mainly due to economic and socio-demographic factors that have been influencing the world population, such as the increase in the elderly population, particularly in Europe, and the changes in lifestyles that are increasingly intensified and marked by stress, poor eating habits, unhealthy lifestyles, among other reasons. In this way the health tourism industry has been growing rapidly in recent decades with a focus on healing the mind, body and well-being. The baby-boom generation has the highest disposable income and the highest propensity to travel to these destinations (Brandão et al., 2021; Quintela et al., 2016).

In this context, health tourism may have different perspectives and definitions, for example, Joppe (2011) cited by Brandão et al. (2021) defined health tourism as being a set of products and experiences whose purpose is to improve the physical or mental well-being of those who practice it, health being its main motive. These authors also add that health tourism is also related to the travel of people who aim to experience other forms of therapies that can improve their health.

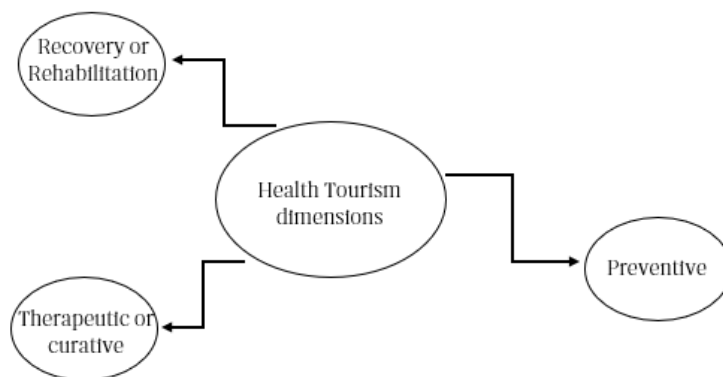
According to Benhacine et al. (2008) cited by Mainil et al. (2017) Health tourism is the result of a set of phenomena that generate a movement of people outside their residence and whose main objective is to "preserve, promote and rebuild their physical, mental and social health" through the sum of health services in places

other than their residence or workplace. Health tourism is also the ability to provide a set of health services that use mineral water and climate as forms of treatment whose objective is to make trips to places specialized in providing this psychophysiological comfort and well-being (Hladkyi et al., 2021; Mainil et al., 2017).

In a study conducted in 2018 by the World Tourism Organization (UNWTO) and the European Travel Commission (ETC), where the main objective was to achieve a better understanding of this market segment, health tourism was defined as a set of "types of tourism that have as their main motivation, the contribution to physical, mental and/or spiritual health through medical and wellness-based activities that enhance the ability of individuals to meet their own needs" and thus act better in society. Types of tourism such as spa tourism, medical tourism, yoga tourism, health and wellness are examples and subsets of health tourism (Brandão et al., 2021).

Health tourism can also comprise and integrate according to Antunes (2005) cited by Brandão et al. (2021) 3 dimensions, represented in figure 7.

Figure 7-Health Tourism dimensions



Source- Own elaboration

In the view of Yen et al. (2021), health tourism is a form of tourism that is based on the "natural, ecological, human and cultural environment" that seeks to improve physical and mental health with wellness and leisure activities combined with medical care. Tabacchi cited by Quintela et al. (2016) emphasizes the idea that

health tourism is “any kind of travel to make yourself or a member of your family healthier”.

One of the strongest characteristics of health tourism is that it is a segment where the stay is higher than any other type of tourism and can "boost the local economy" since it is normally located outside the big cities (Alén et al, 2006 cited by Brandão et al., 2021). In summary, health tourism encompasses a set of activities that achieve physical, psychological, and emotional well-being by offering opportunities to all those who practice it and who seek a better quality of life, be it happiness, health condition, mental health, or social well-being. The combination of concepts such as health, tourism, travel and well-being has in fact led to the affirmation of the concept of health tourism, which since the 17th century has been used to express all practices covering medical or well-being-oriented treatments (Ullah et al., 2021; Wong & Sa’aid Hazley, 2021; Yusof et al., 2019).

Once we define health tourism, however, two major basic pillars and sub-types emerge, wellness tourism and medical tourism, whose main motivation is physical, mental and spiritual health (Cantemir, 2017; UNWTO & ETC, 2018).

Figure 8-Two forms of health Tourism

Medical Services						Tourism services				
HEALTH TOURISM										
Medical Tourism					Wellness Tourism					
Medical Activity based tourism			Natural Health Factor based tourism			Fitness	Soulness	Selfness	Historic Tourism	Spiritual Tourism
Medical Tourism	Reproduction Tourism	Climatic Health Tourism	Medicinal Water based Health Tourism		Yoga and Meditational Tourism					
			Thalasso Tourism	Spa Tourism						
Dimension of Soul and Spirit										
Dimension of Body										

Source: Own elaboration from Printz-Markó’s research (2016) adapted by Cantemir (2017).

Figure 8 depicts the different types of services we can find, both within medical tourism, which relates more to the body dimension, and within wellness tourism, which relates more to the spiritual and soul dimension.

Thus, the need to understand these different concepts arises. Medical tourism and health tourism are increasingly seen as synonymous, but it is necessary to understand their characteristics. We speak of medical tourism when there is a trip across international borders or national borders and the motivation for that trip is to receive medical treatment. We can also say that medical tourism is a "tourism activity which involves the use of evidence-based medical treatments, resources and healing services". Wellness tourism "is a type of tourism activity that aims to improve and balance all the main areas of human life, including physical, mental, emotional, occupational, intellectual and spiritual". Lifestyle improvement is the main motivation for tourists (Uygun & Ekiz, 2017; UNWTO & ETC, 2018).

Table 4- Differences between Wellness Tourism and Medical Tourism

Medical Tourism (more reactive)	Wellness Tourism (more proactive)
<ul style="list-style-type: none"> • Travel to receive treatment for a diagnosed disease, ailment, or condition, or to seek enhancement. • Motivated by desire for lower cost of care and high quality of care. • Activities are reactive to illness, medically necessary. 	<ul style="list-style-type: none"> • Travel do maintain, manage, or improve health and wellbeing. • Motivated by desire for healthy living, disease prevention and stress reduction. • Activities are proactive, voluntary, and non-invasive.

Source: Global Wellness Economy Monitor (2018)

4. Wellness Tourism- well-being dimension

"Wellness is a modern word with ancient roots." The key principles of wellness, as holistic and preventive, go back to "ancient civilizations from the East (India, China) to the West (Greece, Rome)." In the 19th century, Europe, and the United States, developed a set of holistic and natural approaches, which led to wellness being focused on preventative care. Holistic wellness modalities then began to gain more visibility in the 1960s/70s (GWI, 2019).

Wellness began to be more developed in the mid-1990s in European countries with significant health spa offerings, such as Germany, Italy, Austria, Switzerland, and Hungary. The wellness concept allowed spas to reformulate their image, sometimes associated with therapies and treatment of patients, and become important destinations for wellness tourism. In addition, the concept of wellness is currently considered one of the methods of preventing future diseases in increasingly aging societies, and aggregates a holistic approach that aims at the mental and spiritual harmony of the human being (Erfurt-Cooper, Cooper, 2009 cited by Šušić & Dimitrijević, 2015).

In recent decades, and especially in the 21st century, spas have undergone a reinvention, with new concepts and services adapted to current needs, such as physical and psychological well-being. Health tourism, expressing more and more motivations of a group of people who are driven by medical treatment and care of their health, with ideals linked to spas. Hotels and resorts have become important wellness centers, betting on spa facilities, whose goal is to attract more customers by offering quality therapies at reasonable prices. The traditional health services of spas have been replaced by the popularity of services that seek to establish a balance and satisfy healthy lifestyles, such as reducing stress and counteracting the recent problems of today's society (Anaya-Aguilar et al., 2021).

The concept of wellness is focused between balance and personal growth, and according to the study by Peterson et al. (2018), which addresses the characteristics of wellness practitioners, values and interests are considered, and, wellness can appear in any state of health, desirable or undesirable. In addition to this, wellness can allow people to recover from their internal imbalance and improve their

quality of life, as this experience can generate a sense of harmony. In the context of health tourism, the concept of wellness emerges, more specific and focused on health prevention, which has various health care, to improve the quality of life of those who practice it. Based on this, the authors Šušić & Dimitrijević (2015) in their elaborate study that addresses a specific form of health tourism, the wellness spa, speak of 3 user groups that have been formed over time, as we can see in Table 5.

Table 5- 3 groups of consumers in Health Tourism

1st Group	Consumers of traditional medical tourism (enjoyment of the healing properties of thermal mineral waters, mud, weather, among others).
2nd Group	Wellness consumers (enjoyment of therapies with the aim of improving physical and mental well-being)
3rd Group	Consumers with serious health problems that require complex medical treatment.

Source: Adapted from Spasojevic, Susic (2010) cited by Šušić & Dimitrijević (2015)

To achieve perfect wellness, it is always necessary to have a balance between body, mind, and spirit. To this end, Meikassandra et al. (2020), in their study on aspects of wellness tourism, identified the dimensions of wellness that are interrelated and influence each other, as we can see in figure 9.

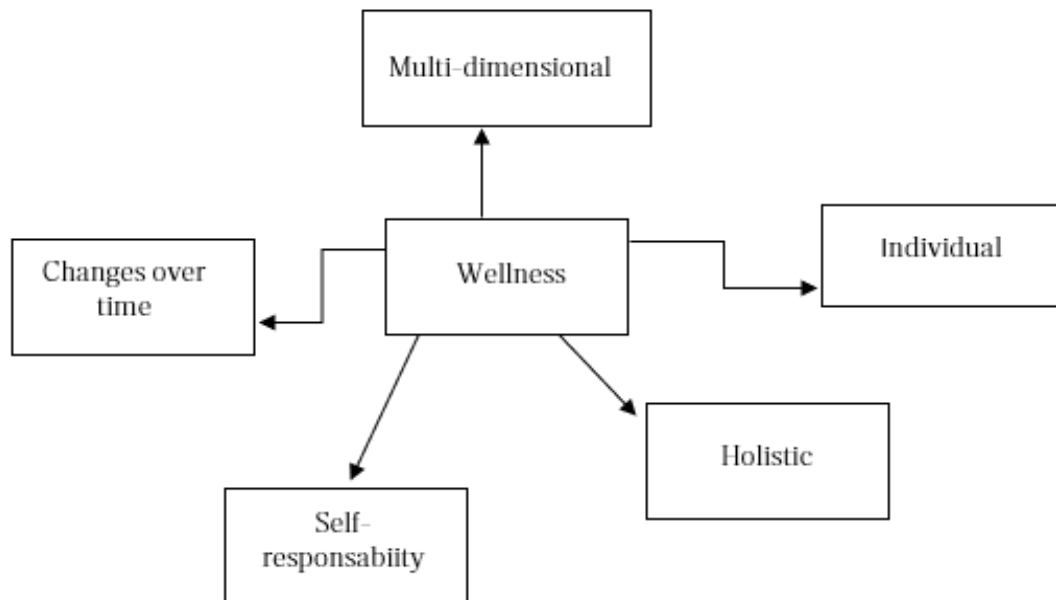
Figure 9-Dimensions of Wellness



Source: Adapted from Meikassandra et al. (2020).

Wellness is a "state of being healthy", which can be holistic and ever-changing, and requires an integration of a physical activity associated and blended with mental relaxation as well as a balance of body and spirit (Lötter & Welthagen, 2020).

Figure 10- Characteristics of Wellness



Source: Adapted from Spasojevic, Susic (2010) cited by Šušić & Dimitrijević (2015)

According to Šušić & Dimitrijević (2015) wellness can have 5 common characteristics, as we can see in the figure 10.

Modern society has made some achievements over time in various fields of knowledge. However, its fast pace of life has brought numerous consequences for its health, an essential pillar. The high level of stress accumulated and experienced daily has resulted in various cardiovascular problems, colds, obesity, and various types of cancer, all of which are detrimental to our quality of life (Godbey, 2009 cited by Šušić & Dimitrijević, 2015).

For these reasons, people have been traveling, not only for health reasons, but also in order to improve their health based on therapies, crucial for physical and psychological well-being (sports, healthy meals, entertainment, among others) (Šušić & Dimitrijević, 2015).

5. Covid-19- What changed in health and well-being during and after

Covid-19 disease is a respiratory disease that emerged in late 2019, and is spreading rapidly, originating in China. With travel restrictions, quarantines, and social distancing measures, tourism and other sectors have seen their activity increasingly limited, leading to a worldwide economic crisis (Bakar & Rosbi, 2020).

Due to the unexpected outbreak of Covid-19, the tourism sector was forced to slow down its activities. In this context, spa tourism was then the tourism product that had a high importance and a health dimension that complemented and mitigated the effects of the pandemic, in the recovery phase. The need for treatments around spas, wellness and health activities, proved to be important in mitigating the economic crisis of this sector (Pinos Navarrete & Shaw, 2021).

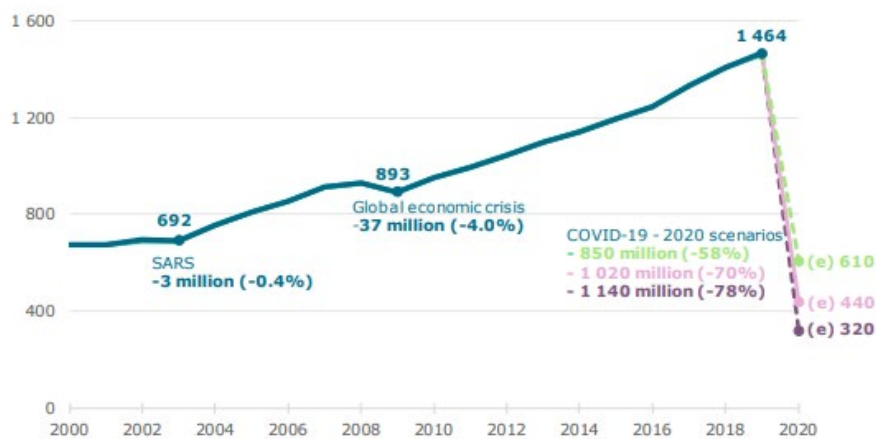
Two years later, the Covid-19 disease revealed itself to be more dangerous than other previous diseases, and it ended up affecting all sectors of activity, especially the hotel and tourism industry, thus requiring greater measures and actions that impacted the lives of societies (Park et al., 2022).

Although the pandemic period led to the stagnation of tourism businesses, health tourism took the opportunity and developed under the impact of the pandemic. Health tourism has demonstrated its high importance in relieving the current pressure experienced and how to relax the body and mind, however according to Cheng et al. (2021) the same sector should strengthen after pandemic better products to be able to maintain the current level of demand.

The tourism industry worldwide was, prior to Covid-19, in remarkable growth, with many investments and business expansion by tourism companies due to demand. According to Saengtattim et al. (2022), if companies and governments do not adapt and create more effective management systems, in an intensification of the disease again, they will have to shut down their operations, however the impact of covid-19 on mankind is and will be inevitable.

Szromek and Polok (2022) say that experiences throughout the pandemic have proven that tourism entities can be extremely important in performing lifesaving functions, such as medical tourism, offering disease recovery activities in places like spas. They also mention the importance of cooperation with the local community, which in an unforeseen global threat, such as Covid-19, can be a key solution.

Figure 11-International tourist arrivals

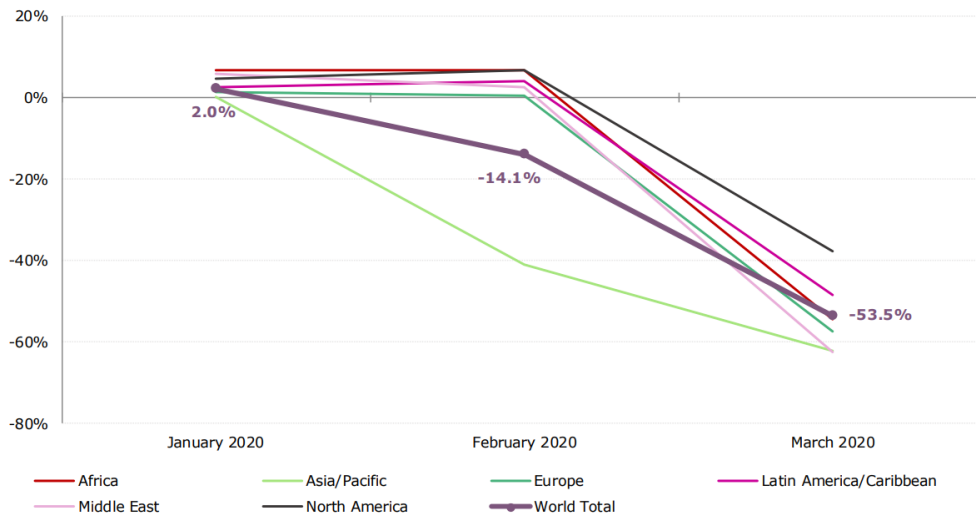


Source: UNWTO (2020)

The prohibition of movement and the closing of borders have led to the tourism sector being the most directly affected. According to figure 11, it is possible to observe a decrease in tourist arrivals, from 60% to 80%, at the beginning of 2020, the year in which the pandemic impacted the world.

As can be seen in figure 12, aviation suffered from the pandemic, registering a brutal drop in the number of trips, about 90%, which were restricted in most countries due to the rapid evolution of the disease. On the other hand, it contributed to the reduction of pollution caused by air travel. The great financial pressure caused by the fall in traffic has also greatly influenced the tourism sector, causing high levels of unemployment.

Figure 12- Percentage of aviation volume



Source: ICAO ADS-B operational data

Source: CCSA (2020)

The covid-19 pandemic impacted not only industries and personal lifestyles, but the entire global society. It was a worldwide disease, unlike others that were limited to certain countries, and it is still present today as one of the most infectious diseases. The efforts of various stakeholders, such as governments, professionals were essential to overcome all the challenges posed by Covid-19 (CCSA, 2020).

The spa sector with the pandemic saw opportunities to reinvent its health character with the communities. In the view of the Pinos Navarrete and Shaw (2021) tourism management of post-pandemic spa spaces should seek to reopen with quality and safety in their services, and seize the moment to open new horizons.

6. Benchmarking: An analysis of the international thermal offer in Europe

Benchmarking analysis inspires several benefits, such as understanding the various services and products that thermal spaces offer. This chapter therefore intends to analyze some European spas, namely those of Portugal, Spain, Italy, France, and Hungary. The main objective will be to understand the similarities that can be found in the services they offer as well as their differences, which make them stand out. Pre-covid and post-covid measures will also be analyzed.

In this analysis, reference hot springs from each of the five study countries were chosen. The choice criterion was based on experience, innovation and demonstrated diversity of offer.

It is intended, therefore, to analyze and systematize the main features and services available at these resorts.

1. São Pedro do Sul Thermal Springs, Viseu, Portugal.

The thermal springs of São Pedro do Sul are located in the central interior of Portugal, in the district of Viseu. They are well known for the properties of their thermal waters for healing and wellness purposes.

To meet the current demands, the thermal spas offer a sophisticated set of offerings, aiming to meet the needs of various target audiences. To enhance the use of thermal waters, the São Pedro do Sul spa has developed a set of dermo-cosmetic products, with a registered trademark AQVA. The thermal water of São Pedro do Sul contains rich properties that contributed to the creation of a brand of dermo cosmetics, which offers products to moisturize the skin while reinforcing its protection.

The São Pedro do Sul hot springs are well directed towards leisure and well-being as well as health treatments using mineral water as a resource. We highlight then the following services available:

- Physiotherapy treatments (Electrical stimulation, ionization, magnetotherapy, cryotherapy, moist heat, muscle strengthening, specific kinesiotherapy techniques, among others);
- Wellness treatments (Relaxation massages, body massages, local relaxation, hot stone massages, showers, cosmetic body treatment, rejuvenation, anti-aging treatment, deep moisturizing treatment, facial massage, among others);
- Thermal healing treatments- Baths, showers, Vapors and pool.

Pre- and post-covid measures

- Use of mask mandatory
- Hand hygiene
- Respiratory labeling
- Reduction of the establishment's capacity.

The spa has become a place of reference at a national level, and valued not only for the services it offers, but also for the cosmetic products that have been created there.

2. Vidago Thermal Springs, Vila Real, Portugal.

Vidago Palace Thermal SPA is located in the parish of Vidago, municipality of Chaves. It is a spa from the 19th century, inserted in the Vidago Palace Hotel property. The mineral water from Vidago is a natural gas-carbonated water, "very rare", and was "discovered" by a local farmer in the 19th century, being used in several exclusive treatments of the Vidago Palace Thermal SPA.

Vidago Palace Thermal provides its visitors with more focused programs for well-being, effective in rejuvenating the body and mind, such as:

- Programs with mineral water from Vidago (Massage showers, Hydrating Ritual for body and face, hydro-massage, among others);
- Wellness programs (meditation, yoga, massage with essential oils, nature trail, Pilates training and fitness sessions, among others);

Besides the above-mentioned services, the Vidago spa is composed of the following areas:

- 10 Treatment Rooms
- 5 Rooms for Thermal Treatments
- 2 Couple Suites
- 2 Relaxation Rooms
- 1 Beauty Room
- 1 Doctor's Office
- 2 Experience showers
- 1 Vitality Pool (outdoor heated pool with water jets)
- 2 Swimming Pools - one indoor and one outdoor
- Hot/Cold Contrast Experiences: sauna, Turkish bath, ice fountain
- 1 Gym fully equipped
- Juice Bar and Pool Bar

3. Outariz Thermal Springs, Ourense, Spain.

The Outariz hot springs are located in Ourense, in the region of Galicia, and are inspired by the Japanese spa culture, the Onsen, based on the principles of respect and harmony with nature. With a capacity for 180 people, it has 11 outdoor and 3 indoor hot springs organized in 2 circuits.

Those who have the opportunity to visit the Outariz thermal springs, can count on several thermal and beauty/cosmetic experiences, such as:

- Thermal healing (The spa maintains a close relationship with Japanese culture);
- Relaxation, beauty, and cosmetic treatments.

One of the factors that differentiates this spa from others is that it also has a multipurpose room, which can be used for meetings and events, lectures, exhibitions, making your space more varied and with options beyond the enjoyment of the spa.

During the Covid-19 pandemic, which shook all tourism infrastructures, due to travel restrictions, the Outariz hot springs were only 30% functional following a strict safety and hygiene protocol.

4. Spa of Alhama of Granada, Spain.

The Spa of Alhama is located in Granada, a small city but with an important tourist center, due to its monuments.

In this SPA we can find several types of services available and special offers, such as:

- Hydrotherapy;
- Physiotherapy;
- Massages;
- Special baths (Milk bath and wine bath);
- Aesthetic services (Hair removal, facial cleansing, body exfoliation, among others);
- Medical services;

Besides the services they offer, the SPA also has the possibility of accommodation.

One of the measures to combat the transmission of the covid-19 virus was to reduce the capacity of the space to 75%.

5. Giardini Poseidon Thermal Baths, island of Ischia, Italy.

Poseidon Thermal Gardens is the biggest thermal park of the island of Ischia with highly curative thermal waters, an island near the famous city of Napoles.

The Giardini Poseidon Thermal Park are well directed towards leisure and well-being as well as health treatments using mineral water as a resource. We highlight then the following services available:

- Thermal baths (possible in more than 20 pools available with different temperatures);
- Health and wellness center (Medicine and rehabilitation, holistic treatments, aesthetics for women and men);
- Catering (has 3 dining areas, such as, beachfront bar, restaurant, and wine cellar);

- Rooms for sports, business, and musical events.

Due to the Covid-19 pandemic in 2021 the resort had to postpone its opening, due to the high cases Italy had faced.

6. Aquaria Thermal SPA, Sirmione, Italy.

Aquaria Thermal baths are located in Sirmione city, with a small city center rich in history. The mineral properties of the hot springs date back 10,000 years, where the raining from the sky into the Monte Baldo impluvium basin at an altitude of over 800 meters, infiltrated deep into the rock, enriching itself with minerals and increasing its temperature.

As for the spa in Sirmione, its main focus is more directed toward health and wellness services, such as:

- Health services (Acupuncture, nutrition, aesthetic dermatology, clinical dermatology, gastroenterology, pulmonology, vascular services, among others);
- Spa and Wellness services (Sauna, face treatment, massages, and others).

During the pandemic that gripped the whole world, and Italy being one of the most affected countries in Europe, there was a need to create protective measures, such as:

- Booking (in order to guarantee more safety);
- Before the trip do Sirmione Thermal baths the guests should check the body temperature and some symptoms that alert for the disease;
- All staff members get their temperature checked daily and use personal equipment (masks);
- To access the facility was required show a valid covid-19 green certification (vaccination/test).

7. Széchenyi Baths, Budapest, Hungary.

Szechenyi Spa Baths is a Neo baroque Palace in the heart of the city of Budapest specifically built for hosting baths, making Hungary the country of baths for many centuries, starting with the Roman who built the first spa.

In the Szechenyi hot springs you can find about 18 outdoor and indoor geothermal pools, where there is a variety of services, such as:

- Wellness services (massages, beerspa and private SPA);
- Medical services (medical massage, medical pool bath, medical tub bath, mud treatment, underwater traction, among others);
- Thermal pool and saunas (outside and inside pools with different temperatures);
- Color bath (an aspect that sets it apart from other spas, an event that brings together Budapest's ancient bathing culture and the ultimate cold night experience, involving entertainment, drinks, and fun).

During the pandemic and even after, a set of rules were established to better control the disease, and as such, some measures to prevent the disease emerged:

- The mandatory use of a mask in indoor areas;
- Maintain a minimum safety distance;
- Before using swimming pools, showering with hot water and soap is mandatory;
- Wash hands frequently;
- A maximum number of people per pool defined, in order to avoid large gathering.

8. Gellért Baths, Budapest, Hungary.

Located near the Danube River, Gellert Spa is another emblematic building of the city of Budapest that attracts many tourists who want to try its thermal waters. Since its opening in 1918, it has offered treatments based on its rich mineral waters, and now has several thermal pools and spaces dedicated to relaxation, entertainment, and spa.

It is possible to find a set of services and offers for those who visit the spa:

- Thermal Baths & Steam services (Indoor mixed Thermal Baths, indoor swimming pool, outdoor pool, plunge pools, private bath and medical mud treatment)
- Steam Baths
- Saunas
- Inhalation
- Pedicure
- Hairdresser (in Hotel Gellert only)
- Beauty Salon
- Sunbathing Terrace
- Sunbeds & Sun Decks
- Catering: Gellert Garden Restaurant
- Gellert Spa & Thermal Baths have occasional bath parties, like a spectacular Cinetrip party.

9. Bagnoles-de-l'Orne Thermal Health Spa, France.

Located in the heart of Bagnoles-de-l'Orne, grows a Spa dedicated to wellness that uses the thermal waters of the region, with rich properties and with essential elements for relaxation and regeneration of the body and skin.

All the hydrotherapy treatments offered in the spa use mineral water drawn from Bagnoles de l'Orne's main thermal spring. In addition to wellness and beauty

treatments, there are also a number of activities that can be done, which distinguishes this place from many others, for example:

- Golf and minigolf;
- Fitness Trail;
- Nordic walking;
- Padel and tennis;
- Family activities.

10. Les Thermes de Saint Gervais Mont Blanc, Saint-Gervais-les-Bains, France.

Recognized in 1807 by the French national academy of medicine, the exceptional Mont Blanc Mountain water has since been used for therapeutic purposes because of its rich qualities. Over the centuries, the spa has undergone changes in space and new adaptations demanded by demand, and currently can accommodate about 65 people in its facilities.

There are therefore a number of services that one can find, such as:

- Spa services (baths, spa with family, fitness center);
- Massage institute (wellness massages, face treatments, thermal water treatments, beauty treatments)
- Medical services (Dermatology treatment, respiratory spa treatment, for oral mucosal diseases, post cancer spa treatment, and rheumatology treatment)

During the pandemic that devastated the world, the spas were forced to close down as a precaution in order to protect their employees and customers and were all later rewarded.

Table 6- Type of service offered at identified spas

Type of services	1	2	3	4	5	6	7	8	9	10
Wellness services	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Thermal services	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Innovative services		✓	✓		✓		✓	✓	✓	

Source- Own elaboration

1. São Pedro do Sul Thermal Springs, Viseu, Portugal.
2. Vidago Thermal Springs, Vila Real, Portugal.
3. Outariz Thermal Springs, Ourense, Spain.
4. Spa of alhama of Granada, Spain.
5. Giardini Poseidon Thermal Baths, island of Ischia, Italy.
6. Aquaria Thermal SPA, Sirmione, Italy.
7. Széchenyi Baths, Budapest, Hungary.
8. Gellért Baths, Budapest, Hungary.
9. Bagnoles-de-l'Orne Thermal Health Spa, France.
10. Les Thermes de Saint Gervais Mont Blanc, Saint-Gervais-les-Bains, France.

In this analysis we can identify that all the spas under study currently offer thermal services and services oriented towards wellness, such as massages, body treatments, aesthetics, among others, which reveals the current trend of society and stakeholders, that focuses on a greater care of body and mind. Besides these services, it was possible to identify others that complement the offer and increase demand, as in some cases, which have fitness centers, night activities at the spa (parties), playgrounds, family activities, among others.

7. Methodological framework

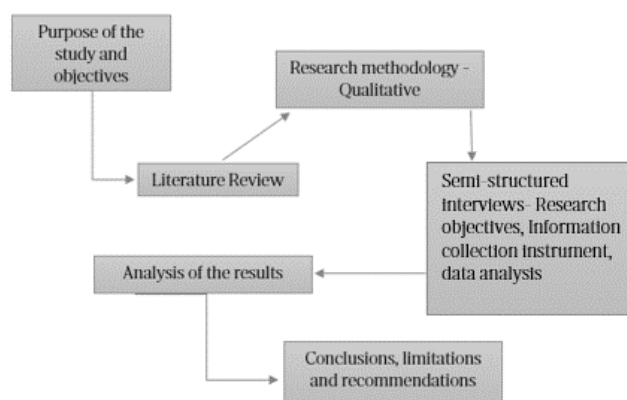
7.1- Methodology

The objective at this point will be to present, clarify and justify the methodological options. To achieve this objective, it is fundamental to define the concept of methodology. This can take several meanings, if on the one hand it is understood from a scientific perspective, since it studies scientific methods, it is often also connoted with the research techniques themselves. In fact, methodology gives us the techniques that will allow us to determine them. Its function is to understand the research processes and to guide its practices, according to a certain conception.

Kothari (2004) in his book on research methodology, refers to the importance of the researcher knowing, in addition to the methods and techniques of research, also the methodology. According to the same author, methodology can be understood as "the science of studying how research is done scientifically", and in his book, he states that all researchers should know which methods or techniques are important for the study and if they will have any meaning.

Once the theoretical framework of the theme is completed, this chapter will develop the entire research model in more detail. Next, the interviews will be presented and analyzed, as well as the objectives of the study. Regarding the empirical collection of the research, it will be described, namely the interview. This chapter ends with an analysis of the collected data. To this end, a model for constructing the study was designed, which allowed a better path to be followed.

Figure 13- Study model



Source- Own elaboration

7.2- Research problems and objectives

The general purpose of this study, through collected data, has as its main objective to understand and explore how wellness, whether physical or psychological, may have transformed the thermalism sector. To do this, it was necessary to define specific objectives that were important for the construction of a research plan.

Table 7- General and specific objectives

<p>General objective</p>	<ul style="list-style-type: none"> • Explore the transformation and evolution of Thermal tourism in the area of wellness.
<p>Specific objectives</p>	<ul style="list-style-type: none"> • Understand the challenges and strategies of the sector during and after Covid. • Understand the profile of demand in Europe today. • Explore the changes in the use of thermalism and its valorization. • Understand the existence of the adaptation of supply to existing demand. • Establish a critical note on the changes of classical thermalism nowadays.

Source- Own elaboration

7.3-Research Method

Currently, health and wellness tourism are in a phase of rejuvenation post-covid-19, with the appearance of new investments and an increasingly diversified offer for those who seek it.

In the scope of this master's thesis, the methodology adopted relies on qualitative research, since according to Merriam & Grenier (2019), “*qualitative researchers are interested in how people understand and experience their world at a particular time and in a particular context*”. The same authors also refer to the importance that a qualitative study can have in the search to understand a certain phenomenon or vision, as is the case of this study, which aims to understand the transformation and evolution of thermal tourism from a wellness perspective, so a quantitative approach would make no sense.

Other authors state that a qualitative methodology uses a "*deep and holistic*" approach that aims to explore feelings, through a fluid narrative (Polit & Beck, 2012 cited by Rutberg & Bouikidis, 2018). To Kothari (2004), this type of qualitative research, aims to "*discover motives or desires, using in-depth interviews*", in order to understand what people think about an issue. According to (Haq, 2015), qualitative research becomes more popular in the late 1960s, where researchers from various fields understood the importance of "understanding complex social issues". In the last decades there has been a growth in the use of this method in different disciplinary areas (Batista et al., 2017).

To do so, according to Eisenhardt and Graebner (2007) and Press (2005) cited by (Haq, 2015) there are a number of methods of collecting information in qualitative studies, such as:

- Focus Group discussions.
- Open ended questionnaires.
- Unstructured interviews.
- Analysis of videos and photographs.
- Ethnography.
- Archival documents analysis.

However, the same authors mention that the most frequently used technique in a qualitative study is semi-structured interviews.

For this study the semi-structured interview was the type of instrument used in gathering information. The interview is catheterized for playing an important role in any academic work, and can lead to higher quality information gathering (Júnior & Júnior, 2012).

According to Richardson (1999) cited by (Júnior & Júnior, 2012), the term interview takes on a certain designation: "*is constructed from two words, inter and view. View refers to the act of seeing, having concern for something. Inter indicates the relation of place or state in space that separates two people or things. Therefore, the term interview refers to the act of perceiving performed between two people,*" usually the interviewee and the interviewer.

The use of an interview to obtain information will understand through testimony how the individual interviewed analyzes and experiences a certain theme or point of view. In this way, it will allow a greater sharing of each participant's views. The process usually involves two people, on a given day and time, where the opportunity for data collection will also depend on who does the interview and how they conduct it (Batista et al., 2017; Haq, 2015).

However, it requires a significant “*amount of time from the researcher to collect and analyze the data. This rich and time-consuming aspect of qualitative data is one reason why sample sizes in qualitative research tend to be smaller in number*” (Lanka et al., 2020)

7.4- Information collection instrument

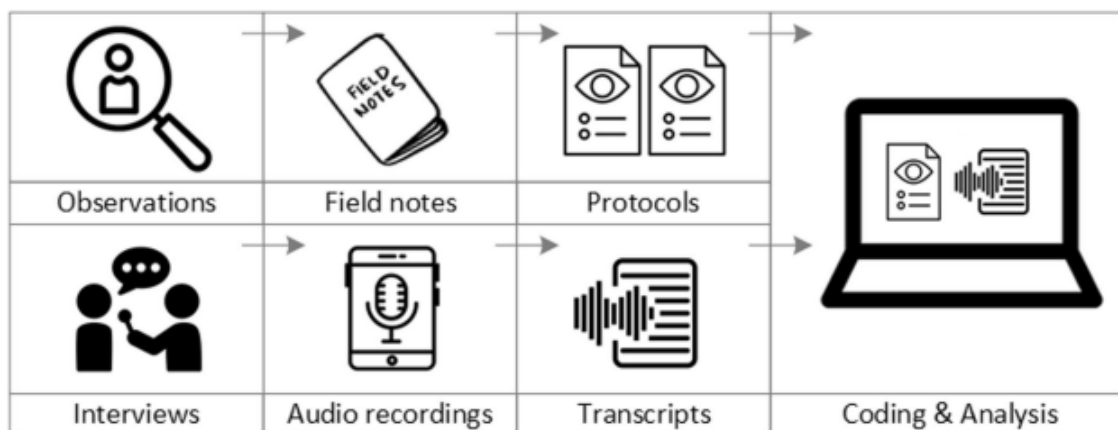
The collection of information in a qualitative methodology requires a set of techniques that are effective in achieving the objectives of an investigation. Traditionally, these information collection techniques are through direct observation and face-to-face, individual or group interviews, however, there are other ways to collect information, such as written notes, audio and video recordings, and documents made available (Torrentira, 2020).

According to Busetto et al. (2020) in his study on “how to use and evaluate qualitative research methods”, the author states that semi-structured and focus group interviews are usually most commonly used as data collection in health studies. For this research a semi-structured interview was chosen, which will allow us to have, in addition to a script with previously defined questions, some freedom to modify the order or change the form of the questions. In this present investigation a set of 10 open-ended questions were presented to the interviewees.

The objective is, despite having a starting script, to be able to transform the interview into a more informal one, giving the interviewee the opportunity to have a freer speech and the interviewer the opportunity to approach related non-predefined themes. This interview consists of a systematic collection of data through questions, where the answers will be carefully listened to and recorded for

data processing (Busetto et al., 2020). It is a descriptive approach because it will also allow throughout the course of the interview to obtain data through direct contact with the interviewees (Sundler et al., 2019).

Figure 14- The process from data collection to data analysis



Source- Busetto et al. (2020)

In the first phase it was important to formulate questions that were related to the specific objectives and that, based on the literature review, would achieve the main purpose of this study, as shown in the following table.

Table 8- Theoretical basis of the interview script

Interview question	Theoretical foundation
Objective 1- Understand the challenges and strategies of the sector during and after covid-19	
1-What services and communication did you consider important during and after covid-19?	(Bakar & Rosbi, 2020) (Pinos Navarrete & Shaw, 2021) (Park et al., 2022). Cheng et al. (2021) Saengtabtum et al. (2022) Szromek & Polok (2022) (CCSA, 2020).
Objective 2- Understand the profile of demand in Europe today	
1-Do you identify in your establishment what type of segments?	Miranda & Vieira (2021) Rocha & Brandão (2014) Gianfaldoni et al. (2017) (Branco, 2019) Smith et al. (2020) DGE (2021)
2-Is there a decrease in terms of total weight of those who go for medical recommendation and an increase in the proportion who go for other reasons, namely relaxation, wellness, but without prescription?	Brandão et al. (2021; Quintela et al. (2016) Gonçalves et al. (2019). Miranda & Vieira (2021) Rocha & Brandão (2014) Gianfaldoni et al. (2017)

Interview question	Theoretical foundation
Objective 3- Explore the changes in the use of Thermalism and its valuation	
1-Given the fluctuation in demand over the years, have you felt that seasonality has been stagnating?	Bandeiras (2019) Gonçalves et al. (2019)
2-What are your limitations in this area?	Own elaboration
3-Wellness and health are more and more transversal, they include more and more activities and dimensions, a more holistic perspective, how does your establishment react to this reality?	Šušić & Dimitrijević (2015) Anaya-Aguilar et al. (2021) Meikassandra et al. (2020) Peterson et al. (2018) Lötter & Welthagen (2020)
Objective 4- Understand the existence of the adaptation of supply to existing demand	
1-In recent times, facing new challenges, have you introduced new services diversifying the offer?	Šušić & Dimitrijević, (2015). Saengtabtim et al. (2022), Cheng et al. (2021)
2-Are you currently investing, adapting the offer to the demand, diversifying with a strategy to reach a larger audience, and to what extent? (If you have new projects or medium- and long-term projects and what are your goals)	Šušić & Dimitrijević, (2015)
Objective 5-Establish a critical note on the changes in today's classical Thermalism	
1-To make the experiences more complete, are you willing, and do you have synergies/partnerships (Culture, nature, gastronomy, wine, tourist entertainment, other activities)?	Šušić & Dimitrijević, (2015) Anaya-Aguilar et al. (2021)
2-Currently modernization or the existence of a great demand for new services, such as food or psychological wellness, are great challenges, but what kind of challenges do you currently identify?	Own elaboration

Source- Own elaboration

7.5- Population, Sample, and Sampling Technique

The target of this research is all entities in the tourism sector, more specifically, in the area of thermal tourism, and they are located in the various countries under study: Portugal, Spain, Italy, Hungary, and France.

Sample size in a qualitative study is generally influenced by the specificity of the sample, which determines the number of participants, in other words, "more specific samples require more homogeneous characteristics", leading to smaller participant sizes. Regardless of each study, small sample sizes should only be explained by the researchers (Rego et al., 2019). The same authors also state that "*to claim to conduct a large number of interviews and not translate them into something visible is of little value.*" Sampling can also be defined when we have theoretical saturation that comes to determine its size, however, this saturation should be that of the data. The sampling technique used will be theoretical sampling.

In this way, the interviews were aimed at all the thermal establishments and all the thermal regions that, directly or indirectly, had responsibility for promoting wellness services, which constitute the sample of this study. The selection of stakeholders with greater experience and knowledge of the evolution and transformation of the wellness sector was crucial in this research, as well as to describe all the challenges caused by covid-19, since they were on the front line of the pandemic in this sector.

7.6- Analysis and processing of the interviews

Characterization of the participants

Through the interviews it was possible to draw a sociodemographic profile, as can be seen in table 9. Through the same table we were able to realize that the age of the interviewees is between 42-58, with a minimum of 12 years of professional experience up to 30 years in the thermal sector. In relation to academic qualifications, except for one participant, all have higher education qualifications. It was also important in this analysis to understand what functions they currently perform, which are mostly directors.

Table 9- Characterization of the participants

Nº	Role of the interviewee	Age	Professional experience	Nationality	Academic qualifications
I1	Thermal Spa director	58	22	Portuguese	Degree
I2	Associate Professor in Tourism Management	NA	23	Hungarian	PhD
I3	Hotel Director	54	30	Spanish	Post-graduate
I4	Thermal Spa director	NA	20	Portuguese	Degree
I5	Thermal Spa director	42	18	French	Degree
I6	HTWWLife CEO	NA	28	Hungarian	PhD
I7	Tourism organization director	44	15	Portuguese	Degree
I8	Spa Manager	30	12	Portuguese	Post-graduate
I9	Hotel Manager	NA	23	Spanish	Degree
I10	President of thermal springs of Portugal	51	18	Portuguese	Master's degree

Source- Own elaboration

Through the analysis of the interviews and in particular the four themes identified in table 10, it was possible to identify and understand the various points of view of the interviewees on certain themes that meet the objectives of the study.

Table 10- Interview topics for analysis

Interview topics for analysis
<p>1. Demand profile in Europe (Purpose of topic- Identify the months of demand, the age group, length of stay and what type of services are sought)</p>
<p>2. Adapting Supply to Demand (Purpose of topic- what new services they have to offer that will attract more people, what new projects and strategies they have at the moment)</p>
<p>3. Changes in Classic Thermalism and its valorization (Purpose of topic- what kind of partnerships they must enhance the spa experience, the limitations, if there is seasonality, holistic perspective, if modernization helps to create new services)</p>
<p>4. Industry challenges and strategies during and after covid-19 (Purpose of topic- what kind of services and communication was done during covid-19 and after, actions, strategies, and measures)</p>

Source- Own elaboration

7.6.1- Demand profile in Europe

In order to define a current profile in Europe of who seeks this type of service, the interviewees were asked about the period of greatest annual demand, thus identifying the most popular activities as well as the corresponding age group.

Firstly, in the references to the age range and what type of public is still the most usual in the thermal establishments, all interviewees refer that still the public that most seeks these spaces are people aged between "40-55" (I7) and over 55 years.

"The main audience that seeks is the senior who also does prevention (keep well), that is, there is still more weight on the senior than on the young in relation to demand." (I1)

"The segments are mainly older domestic tourists (aged 55+) who are going to thermal medical spas for balneological treatments". (I2)

However, it is worth noting that currently and in the last few years, the spa sector has seen a greater demand, mainly by a younger public, who not only want to escape from the stressful daily life in the cities, but also have sought out activities for their well-being.

“There is a growth in the number of visitors who are interested in wellness, especially women and couples”. (I2)

“The growing markets for spas right now according to our research are couples and families” (I2)

“Family tourist, who are couples between 30 and 50 years old with children, who take advantage of the vacation seasons to rest, combining the thermal activity with sports activities and sightseeing”. (I9)

“The segments are fundamentally linked to social thermalism, everything that is the third age, which has nothing to do with the third age of today and the third age of 20 years ago. Nowadays we are talking about people already retired or pre-retired, but with an excellent physical and psychological condition” (I9)

Regarding the peak demand period, in general it was possible to verify a disagreement, where some interviewees refer that previously *“The months of June, July and August were months of great demand and predominantly sought by people who worked in the fields and sought to rest their bodies, instead of going to the beach, which currently has been changing” (I1)*. However, other interviewees address and reinforce that there are certain regions where the spas are popular in winter months, which may be linked to certain traditions.

“I teach in Estonia (Parnu) regularly where the spas are really popular in winter. Actually, it is nicer to go to warm spa waters when it is not so hot outside “. (I2)

In this context, during the interviews, there was still reference to spas that have mixed areas, where it is possible throughout the year to have a similar demand, compared to places that are only outdoors, often conditioned by the weather.

“In certain countries strong assets are available that have both indoor and outdoor components. This means the summer months capitalize on the outdoor parts, in winter they use the indoor parts.” (I6)

When asked about the decrease, in terms of weight, of those who go on medical recommendation, and of those who do not go on medical recommendation, but for other reasons (relaxation), it was possible to realize that traditional medical interventions in thermal spaces are only possible when there is a greater availability of time, thus requiring a longer stay, "2-3 weeks" (I6).

"As the Thermalism market has declined, the number of customers has dropped and consequently the number of patients who come on medical recommendation has dropped." (I1)

According to the interviewees, although there is not necessarily a decrease in the demand for services of the so-called "*classic thermalism*" (I1), which concerns treatments for various pathologies, there is "*a denoted increase in demand for wellness thermalists*" (I4).

Since the "*wellness is expensive and not state subsidized, so it is not affordable for everyone (e.g. older pensioners or those with a low income in Eastern Europe)*" (I2)," this may lead to a decrease in demand.

As this type of intervention is done by senior guests for the most part, "*younger markets cannot really spend that long time away just for one trip. This has an impact on medical demand, the market is getting thinner. Also, if there was no external co-financing the medical demand can drop significantly*" (I6).

Even with diverse opinions on demand, it was important to emphasize that this wellness segment, currently present in all spa establishments, "*basically looks for a mixed establishment, with a leisure part and a spa part*" (I3) and has "*certainly shown growth.*" (I4). Thermal establishments have "*to take advantage of their thermal waters and therefore we have to try to achieve a double segment: the leisure segment, taking advantage of the waters and the facilities, and the health segment, which came by a pure health concept*" (I3) since "*There has been a strong increase in wellness offering facilities and guests travel based on their own will and do not need prescription*" (I6). Also, according to interviewee 9, "*the thermal tourists who used to come only for therapeutic recommendations, were old people, with several pathologies that could limit them a little, but not nowadays.*

Nowadays, with the same age as before, they are in much better physical conditions, although they may come with medical recommendations as well, they are a public that comes with a great desire to do activities and excursions, also enjoying a vacation. Therefore, leisure has had more impact than medical recommendations”. In table 11 we can see a summary of the main results found in this topic.

Table 11- Summaries of the main findings regarding the demand profile in Europe

Categories	Results
Age group	<ul style="list-style-type: none"> • Older domestic tourists (aged 55+) (I2) • Between 40-55" (I7) • “The main audience that seeks is the senior who also does prevention (keep well), that is, there is still more weight on the senior than on the young in relation to demand.” (I1) • “Family tourist, who are couples between 30 and 50 years old with children, who take advantage of the vacation seasons to rest, combining the thermal activity with sports activities and sightseeing”. (I9)
Demand trends	<ul style="list-style-type: none"> • “Summer months capitalize on the outdoor parts; in winter they use the indoor parts.” (I6) • “The months of June, July and August were months of great demand...which currently has been changing” (I1) • Estonia (Parnu) regularly where the spas are really popular in winter (I2)
Length of stay	<ul style="list-style-type: none"> • “The traditional medical interventions, balneotherapy tends to require long(er) stays, 2-3 weeks.” (I6). • “4-5 days” (I3).
Decrease/Increase of medical recommendation.	<ul style="list-style-type: none"> • “As the Thermalism market has declined, the number of customers has dropped and consequently the number of patients who come on medical recommendation has dropped.” (I1) • “There has been a strong increase in wellness offering facilities and guests travel based on their own will and do not need prescription” (I6). • “The thermal tourists who used to come only for therapeutic recommendations, were old people, with several pathologies that could limit them a little, but not nowadays. Nowadays, with the same age as before, they are in much better physical conditions” (I9)

Source- Own elaboration

7.6.2- Adapting Supply to Demand

Since the behavior of demand over time has already been observed, it was important to understand whether supply has been adapting to demand. In general,

all the interviewees revealed a set of services, some innovative, that diversified the offer, with the main objective of attracting a larger public.

It is noteworthy that the impact of covid-19 came to awaken the need to create new strategies and projects that would circumvent the consequences caused by the disease, such as, "*the cost of raw materials that rose by about 63%, making it difficult to possibly renovate the spaces*" (I1), leading some thermal establishments to "*come back with the same offer as in 2019*" (I5).

However, most interviewees revealed in their interviews the importance and need for change. For example, interviewee 1 highlights the set of services that currently has available, such as, "*nutrition, physical exercise, psychological support, yoga, pilates, and a specialized offer for children*" referring the importance that "*water can have, due to the properties and that provides answers to certain pathologies, with values that go beyond the therapeutic indications, with relaxing effects*". Despite having a thermal offer, it has other important complementary services, and as defended by other interviewees, who highlight that the "*objective is not only to bring a client to treat only his illness, but also to take him to know all the other things that a spa can offer him, and thus show that not only a 60-year-old person should come*" (I3).

During the interviews, there is a current focus on new strategies and innovative services, where "*the spa offer is being increased in order to be more appealing to wellness customers*" (I4). The strategies involve generating new products, as we can see in the statements of several interviewees.

"Creation of several thematic baths, new treatment circuits and also the creation of a thermal cosmetics line" (I4)

"Creating a project that would be like a thermal clinic, changing the paradigm that thermal baths are for the elderly with major problems, that is, a place that would not just be for treating an illness, but a place of prevention, a place where we can go continuously" (I3)

"New products have been created to complement the thermal cure associated with nature and well-being, bio-healthy menus, tourist routes, exercise plans" (I7)

“In the physical medicine and rehabilitation segment, we have introduced a set of services, namely, post-covid treatments, with specific treatments and programs for this area” (I10)

“In the last few years, we have created several leisure activities, especially sports, such as eco bike rides, an electric bicycle, along the minhoto way, which is the case where we are, thus also combining it with the Santiago way and wine cellars” (I9)

Strategies to attract new markets exist more and more, and there is more cooperation between areas, such as sports, nutrition, and even medical expertise, be it psychic or physical. The interviewees' line of thought states that without the cooperation of these various areas it would be difficult to offer more complete packages, as in the case of the new idea presented by interviewee 4, where "a "Skin Clinic" is also being developed, in order to take advantage of the properties of hyposaline waters, offering a treatment service for skin diseases, more complete, cooperating with a nutritionist, psychologist and dermatologist".

The opportunities that exist in creating activities for the wellbeing of body and mind should not be wasted and are important. It also becomes essential to *"generate new products on an annual basis. Have for example a doctor as a consultant, and work with him continuously. Train the staff, and introduce some of this concept to younger people who know our product, for example, for children" (I3).*

Establishments must look for innovation to capture new customers, otherwise they will be losing out to other markets.

"To increase our customer segments, we must look to give them a new experience. In the end, if the customer does not have, or does not see something different, everything will be the same. For example, we have a golf course" (I3).

“We're going to re-qualify a wellness and wellbeing spa, for a whole new public, a new public that seeks us out, we're going to have treatments with derma cosmetics. A more holistic and balancing perspective of thermal treatments” (I10)

Interestingly, regarding service or product innovation, interviewees 2 and 6 also give the example of other countries in Europe, not present in the study, which have created and introduced new experiences in the face of the current situation related

to the covid-19 disease. An innovative product in the area of wellness was also highlighted, which aims to help destination managers, where it is possible through this approach to share experiences and stories about personal success, an ongoing journey, a successful work program, or a great tool that you use, where everyone can inspire each other on the path to better wellness.

"The whole gastronomic part oriented to social events, was a part that also changed radically, enjoying more and more outdoor spaces and gastronomic activities with entertainment, but always outdoors" (I9)

"I have not seen too many new products in this region (Hungary and Eastern Europe). However, in Austria (next door) there were quite a few COVID recovery packages in spas. But Austrians have more disposable income to afford this. There is also a closer connection to nature since COVID. People want outside wellness experiences like forest therapy (popular in Finland, Serbia, Japan, Korea)". (I2)

"We analyzed the role of bathing in cultures and traditions, as we believe there is a missed opportunity." (I6)

"The development of the Your Wellness Story product can help individual service providers as well as destination management bodies to re-establish their position in the market. We are looking for pilot sites so that we can exemplify the approach." (I6)

"This part here in Galicia is still very "green" and there are still many more things to do, like, combined products in which we put value on the thermal water, on the economy, but above all on the location where we are. We are going in that line of playing the world of tourism with the world of sport for an older public as well, and nowadays there are not so many limitations to practice this kind of sport, and people with 60/70 years old have a wonderful physical condition" (I9)

To conclude, the importance of adapting supply to demand has been verified, with the introduction of new strategies and innovative products, there are still some barriers in this sector due to lack of investment, on the one hand, due to the current economic situation we live in, which will eventually affect those who seek these spaces.

"The fixed expenses are getting higher and higher due to the prices of paper, alcohol, electricity, gas..., however the price list has not changed in relation to these increases,

which does not revert into profit and when the prices of products go up, it will have an effect on demand. Less customers, less consumables. But the fixed expenses will remain the same. It's sacrificing margins that don't exist". (I1)

"We were starting to think about an extension in 2019 to increase our fitness clientele. However, due to the economic situation, our projects are currently on hold. In 2023 there will be an additional cost of about 150,000 euros." (I5).

Although some establishments have experienced some difficulties over these years, mostly related to the maintenance of the spaces, other establishments have had the opportunity to expand their spaces due to the high demand for wellness-related services.

"In the area of wellness, we developed a very large set of offers, massages, dermo cosmetic composites, which may have led to greater demand, so we had to double the number of spaces available to meet customer needs" (I10)

In table 12 we can see a summary of the main results found in this topic.

Table 12- Summaries of the main findings regarding the adapting supply to demand

Categories	Results
Innovative products	<ul style="list-style-type: none"> • <i>"The development of the Your Wellness Story product can help individual service providers as well as destination management bodies to re-establish their position in the market. We are looking for pilot sites so that we can exemplify the approach." (16)</i> • <i>"a "Skin Clinic" is also being developed, in order to take advantage of the properties of hyposaline waters, offering a treatment service for skin diseases, more complete, cooperating with a nutritionist, psychologist and dermatologist" (14).</i> • <i>"In the last few years, we have created several leisure activities, especially sports, such as eco bike rides, an electric bicycle, along the minhoto way" (19)</i>
New strategies	<ul style="list-style-type: none"> • <i>"Creation of several thematic baths, new treatment circuits and also the creation of a thermal cosmetics line" (14)</i> • <i>"Creating a project that would be like a thermal clinic, changing the paradigm that thermal baths are for the elderly with major problems, that is, a place that would not just be for treating an illness, but a place of prevention, a place where we can go continuously" (13)</i> • <i>"New products have been created to complement the thermal cure associated with nature and well-being, bio-healthy menus, tourist routes, exercise plans" (17)</i>
Challenges	<ul style="list-style-type: none"> • <i>The fixed expenses are getting higher and higher due to the prices of paper, alcohol, electricity, gas..., however the price list has not changed in relation to these increases, which does not revert into profit and when the prices of products go up, it will have an effect on demand. Less customers, less consumables. But the fixed expenses will remain the same. It's sacrificing margins that don't exist". (11)</i>

Source- Own elaboration

7.6.3- Changes in Classic Thermalism and its valorization

Nowadays we have seen several changes, in all sectors, with the modernization and creation of new services, as well as the challenges experienced in recent years. With these changes the classic thermalism has undergone a revolution, which has transformed it into a more modern and customer-oriented concept, although some changes have not always been good, as mentioned by interviewee 1.

"Unfortunately, the changes haven't been exactly good, with a decrease in demand in terms of the so-called classic thermalism and an increase in demand for a so-called wellness thermalism, but the increase in this more current aspect doesn't compensate for the loss that we had in the past"(I1)

However, there are some limitations that can hinder the development of thermal spaces, as well as the development and growth of this area of tourism. Throughout the interviews, the interviewees were able to identify the main limitations, as we can see.

"This type of preventive treatment is not supported by the Portuguese SNS, which makes it difficult to find. For example, in Germany, they take advantage of it and indicate the thermal spaces to citizens who are on sick leave for some health reason (psychological, physical), because it's also financed by the government itself. The example of Spain, the imsero program. In the case of France, the government financially supports the treatments and even encourages it in other countries." (I1)

"Lack of disposal income in this region (CEE) which will worsen with inflation. Spas are seen as luxury services so they will not be visited as much. Lack of workforce and trained employees, especially in the countryside spas. Customer service is not always good enough to satisfy international guests yet". (I2)

"Wellness is expensive and not state subsidized, so it is not affordable for everyone (e.g. older pensioners or those with a low income in Eastern Europe)". (I2)

"These facilities require a lot of maintenance, because they are machines, and where the thermal water is, it is very corrosive and causes constant installation problems. That's why the main limitation is the position of enough capital for the installations to be renewed from year to year. But our job is to try to sell the product at prices that allow it to be

renewed every year, otherwise there will be a problem in the end. That would be the limitation" (I3)

"Many spas in Spain and Portugal have become obsolete, there has been no growth, they have not kept up with the evolution to catch up and treat a new client. They stayed with the 60/70-year-old client, a service that is not up to date, they don't improve anything"(I3)

"The limitations will be bureaucracy. Health and tourism are still very far apart. The general direction of health doesn't allow us to do certain things. For example, in Portugal it's still not allowed to have a wellness spa. Any thermal spa has to have what you call, the fundamental services" (I10)

"The biggest of all are the often-absurd regulations, which limit the activity in a completely senseless way and, another, finding trained professionals to be able to hire"(I9)

Interestingly, a different opinion about the limitations in this area emerged during the interviews. According to interviewee 6, *"Economic depression, lockdowns should be used for product development, re-evaluation of existing services, etc. We did that but the survival instinct and the short-term planning outlook of service providers' limit how innovation may be implemented. This is a critical problem since we cannot change status quo if no one is ready for changes"*.

Despite the existing limitations in the area, it is necessary to seek alternatives to circumvent this less positive effect and attract more public. Throughout the interviews it was interesting to realize that new products and partnerships have been created to combat the current difficulties, so the importance of working with various partners and entities.

"Surely partnerships are worthwhile."(I1)

"Tourism products must be increasingly integrated"(I10)

"Partnerships with hotel units, tourism associations, holding festivals, among others."(I4)

"We have partnerships with the tourism committee of the jura department, jura tourism office, hotel units in Salins..."(I5)

“We advocate partnerships and the inclusion of complementary services, products. We believe that any activity may improve the wellbeing of the customer. All we need to do is to orchestrate the experiences and the service provision accordingly”. (I6)

To make the experiences complete and more valued the partnerships revealed, according to interviewee 2, to be a great support, where it addresses some examples adopted by the spas in Hungary.

“There are 22 wine regions in Hungary so yes, there is already some vinotherapy. But it is a small market. Certainly, the Budapest spas attract people who are interested in heritage because of the beautiful architecture. But it is not that usual to package spas with nature-based recreation, even though most of the spas are in the countryside. One exception might be spas near Lake Balaton where people enjoy the freshwater lake and maybe some festivals and local attractions too”.

The relationship with wine and the fact that Hungary is a country that has these regions makes it easy to seek out this different experience, as well as, the spa packages that take advantage of what nature has to offer.

Interviewee 3 refers to a project he is currently working on, *“the Torra project, in Águas Santas, which is where there is a large wine production and we have the river, we have activities, that is where well-being is. The possibility to visit the area and get to know the culture. We always have all kinds of unions”*, which demonstrates the importance of a more complete experience.

“And the golf program is one of those examples, the client comes for ca and ends up leaving it more affordable.”(I3)

The creation of new products/services becomes the *“main challenge for the thermal service, which is to affirm its offer, which is different. It is to make the customer know that thermal spas have special characteristics and that is why it is good for health, good for everything and that is why you have to pay a different price for it.”(I3)*

During the interviews these initiatives have helped to fight seasonality, where there have already been some changes and some interviewees refer that the *“Seasonality is not relevant to us as it is to actual thermal facilities” (I6)* and *“there is less*

seasonality in spas than in other sectors because they make good wet weather experiences”(12)

“In the past, thermal tourism was very concentrated in 3 months and nowadays thermal tourism does not present high peaks, and there is a more uniform demand throughout the year, ending the seasonality”(11)

“The seasonality had a change, 20 years ago the busiest time was August, now it is September, October and the first half of November” (19)

“In our case the seasonality remains very seasonal because we have 3 different segments, in which one continues to be very seasonal - the therapeutic one, no matter how much effort has been made, it continues to be very seasonal. The moments of greatest demand continue to be the months of August, September, and October, but the peak of the peaks is in September”(110)

“The medical parts do not tend to have a similar fluctuation, more like the opposite. Medical services tend to be used in spring, winter, and autumn months. There are facilities that do only wellness, other only medical, others both. Seasonality affects them very differently. Especially if these services were offered in a hotel environment and not in a standalone facility”(16)

However, it appears that over the years, the sector has found ways to combat this phenomenon, finding alternatives. Spain is one of the great examples, mentioned by interviewee 3, of having found a way to maintain employment and economic activity, alleviating the consequences of seasonality in the country's tourism sector.

“Thanks to the Imserso social thermal program in Spain, it allowed a destabilization...the client changed, with the social thermal program, which is very important in Spain. The clients are no longer just clients who can't walk, they are clients who are even my age.” (16)

To conclude, health and wellness is increasingly cross-cutting, with activities and dimensions from a more holistic perspective. *“The customer has changed, and we also have to change and explain the changes. We must take advantage of the resources we have, but also enter into market segments that sometimes don't look for treatment on a daily basis, they only look for 2 days in a spa. Unite experiences, look for global experiences” (13).*

Thermalism in a more wellness area, the so-called "modern thermalism", is a new reality that has been present in all thermal establishments and has been addressed by almost all interviewees. Some even refer that *"wellness or health have always been inclusive, and the holistic perspective is not new either. What is new that this became more mainstream and seems to be monetized more. We were among the first one who campaigned for a more inclusive approach. For us this is nothing new"* (I6)

The idea of the spa concept has evolved over the generations, adapting to current demand, with offerings more aimed at *"wellness customers."* (I4)

"In Hungary, around half of all treatments are still connected to balneology for older local people or domestic tourists. the rest is starting to become more global including Thai massage or Ayurveda. However, beauty and cosmetic surgery treatments are still more popular or relaxation massages like Swedish or aromatherapy". (I2)

Today, *"the challenge is to position thermalism as what it is, as wellness, health prevention, with professionals."* (I3)

"The real challenges are how to separate the real and meaningful services and destinations from those that use wellness/health for marketing and for labelling. Showing the evidence of any service claiming wellness improving qualities would need to be essential. There is a lot of fluff and customers may find it difficult to identify which is nothing more than a joke and which one can really do what it says it does". (I6)

"Psychological and alimentary balance is our great focus and offer. A great potential and challenge for the future, will be to link the area of health and wellness and spa to the area of adventure sports and nature with qualified human resources"(I10)

One of the reflections shared by one of the interviewees refers to the positioning of the improvement of Portugal's image, regarding its thermal offer. He mentions that a model that could be followed would be the Swiss model, where it is possible to have thermal hospitals, as well as spas totally focused on wellness. Besides the natural mineral water, a set of services, namely medical and nursing availability should be provided (I10). In table 13 we can see a summary of the main results found in this topic.

Table 13- Summaries of the main findings regarding the Thermalism and its valorization

Categories	Results
<p>Limitations</p>	<ul style="list-style-type: none"> • <i>“This type of preventive treatment is not supported by the Portuguese SNS...” (I1)</i> • <i>“Lack of disposal income in this region (CEE) which will worsen with inflation. Spas are seen as luxury services so they will not be visited as much...” (I2)</i> • <i>“Wellness is expensive and not state subsidized, so it is not affordable for everyone...” (I2)</i> • <i>“These facilities require a lot of maintenance, because they are machines, and where the thermal water is, it is very corrosive and causes constant installation problems. That's why the main limitation is the position of enough capital for the installations to be renewed from year to year”. (I3)</i> • <i>“The biggest of all are the often-absurd regulations, which limit the activity in a completely senseless way” (I9)</i>
<p>Partnerships</p>	<ul style="list-style-type: none"> • <i>“Partnerships with hotel units, tourism associations, holding festivals, among others.” (I4)</i> • <i>“We have partnerships with the tourism committee of the jura department, jura tourism office, hotel units in Salins...” (I5)</i> • <i>“We advocate partnerships and the inclusion of complementary services, products. We believe that any activity may improve the wellbeing of the customer. All we need to do is to orchestrate the experiences and the service provision accordingly”. (I6)</i>
<p>Seasonality</p>	<ul style="list-style-type: none"> • <i>“Seasonality is not relevant to us as it is to actual thermal facilities” (I6)</i> • <i>“There is less seasonality in spas than in other sectors because they make good wet weather experiences” (I2).</i>
<p>Holistic perspective</p>	<ul style="list-style-type: none"> • <i>“Wellness or health have always been inclusive, and the holistic perspective is not new either”. (I6)</i> • <i>“The challenge is to position thermalism as what it is, as wellness, health prevention, with professionals.” (I3)</i>

Source- Own elaboration

7.6.4- Industry challenges and strategies during and after covid-19

In 2020, the world faced one of the biggest health crises in recent times, the emergence of covid-19, thus affecting people and businesses. With the disease came restrictions, more impactful in the area of tourism, with the restriction of movement between countries, hindering the tourism business. Thus, during the pandemic, thermal tourism saw the opportunity to reinvent itself, in the face of a very stagnant business.

During the pandemic and even post pandemic period, some interviewees mention the importance that good communication had in the reintroduction of their services, but they had to adopt rules to avoid the spread of the virus.

"The most important thing in terms of communication was post-covid, to continue to communicate what is our capacity for safety, transmission of a service of excellence and safety. A service that has all the concerns at the health level, in public health, with destinations highly connoted as safe. And this must continue to be communicated. A service that is not massified, but a service with quality" (I10)

"There was communication about the measures put in place internally to reassure our customers (use of masks, disinfection measures, limiting the number of people in the pools, control of passes...). After covid, the big communication to relaunch the wellness activity after 2 years was social media, such as, TV, local radio, local newspapers, animation of our Facebook page)." (I5)

"Communication was mainly about hygiene and social distancing in spas because of the intimate nature of spa treatments and the close proximity to others in spa waters". (I2)

The importance of keeping the spaces safe was only possible if the thermal spaces adopted a set of rules for hygiene and virus spread control, such as, *"Use of masks, frequent hand washing, safety distances, minimum 1.5 meters, constant disinfection of the entire spa in common and treatment areas and proper disposal of waste (masks, gloves, etc.) in the containers provided for that purpose". (I7, I4)*

The spa sector, after a set of measures were decreed to stop this disease, suffered with the permanent closure of its spaces, due to the association of the spread and

its waters. According to interviewee 3, "*there were investigations that said there was more risk of transmission in the water, when it seemed that this was not the case. Initially, when it was back to normal, it was not easy to convince the client that the thermal baths, the spas, were safe. Because there were also contacts with the person, etc. What we did was communicate with the doctors, who had experience in medical biology, who gave their view that the waters, or bathing in a pool, or having a massage would not be a risk.*"

"The media around the hot springs was wrong, when they thought that the thermal spaces were a risk to the community. Coming to the hot springs was even beneficial and it has been proven, the risk that there was in the hot springs was contamination due to proximity, however many establishments did not close because of this proximity (hospitals, public transportation...)." (I1)

Although the disease had an impact on public health, it brought with it the opportunity for spas, as "*health centers*" (I3), to offer a set of services and products, which came to "*add more value to respiratory treatments*" (I1).

"On the positive side, both in the prevention chapter and in the cure chapter (people who have lost mobility.) the thermal spaces are spaces that can benefit in a transversal post-covid recovery. Supports for people to go to the spas should not be lost." (I1)

A set of "*post-COVID packages in spas and wellness facilities (e.g. retreats) that dealt with fatigue or immune boosting*", (I2), and wellness services, psychological and physical, were thus created, valued even more due to the pandemic period, as well as, nature activities and sports.

"The importance of the natural state of healing assets such as thermal waters. Anything that is a natural source appears to be more appreciated" (I6)

In table 14 we can see a summary of the main results found in this topic.

Table 14- Summaries of the main findings regarding the industry challenges during and after Covid-19

Categories	Results
<p>Communication</p>	<ul style="list-style-type: none"> • <i>"The most important thing in terms of communication was post-covid, to continue to communicate what is our capacity for safety, transmission of a service of excellence and safety". (110)</i> • <i>"After covid, the big communication to relaunch the wellness activity after 2 years was social media, such as, TV, local radio, local newspapers, animation of our Facebook page". (15)</i>
<p>Guidelines</p>	<ul style="list-style-type: none"> • <i>"Use of masks, frequent hand washing, safety distances, minimum 1.5 meters, constant disinfection of the entire spa in common and treatment areas and proper disposal of waste (masks, gloves, etc.) in the containers provided for that purpose". (17, 14)</i>
<p>Security</p>	<ul style="list-style-type: none"> • <i>"What we did was communicate with the doctors, who had experience in medical biology, who gave their view that the waters, or bathing in a pool, or having a massage would not be a risk." (13)</i> • <i>"Coming to the hot springs was even beneficial and it has been proven, the risk that there was in the hot springs was contamination due to proximity, however many establishments did not close because of this proximity (hospitals, public transportation...)." (11)</i>

Source- Own elaboration

8- Discussion and main findings

This chapter will discuss the main results of the research based on a comparison between the results obtained and the literature review.

According to the study of Rocha and Brandão (2014) it was possible to distinguish two distinct thermalism segments, classic thermalism and wellness thermalism. The first segment was defined as that which represented an offer organized to satisfy a sought-after motivation based on identified pathologies or recoveries, with a merely therapeutic objective while the second segment was defined as that in which the offer was aimed at clients where the main motivation sought was leisure, tourism, or therapeutic recreation.

In line with the thinking of Tzedopoulos et al. (2018), "modern"/wellness Thermalism has led to a decrease in elderly visitors, but on the other hand, the younger community is increasingly attracted by wellness services, which seek to establish a harmony and care between body and mind, topics widely discussed today, and that according to interviewee 2 confirms that in fact there is a growth in the number of visitors who are interested in wellness, especially couples, but that *“the decrease in demand for so-called classical thermalism, and an increase in demand for so-called wellness thermalism, does not compensate for the loss that was made in the past”*. (I1).

Increasingly, according to Branco (2019), nowadays younger populations are more concerned with health at an earlier stage of their lives, however, it was verified during the interviews that the identified demand profile still fits a public, between *“40-55”* (I7) or *“+55”* (I2) years old, who still look for bathing treatments with thermal waters (I2) or the *“family tourist, who are couples between 30 and 50 years old with children, who take advantage of the vacation seasons to rest, combining the thermal activity with sports activities and sightseeing”*. (I9)

However, the creation of new projects, associated to continuous prevention and not only to the treatment of a disease, becomes essential to attract younger audiences, changing the paradigm of thermal baths associated with elderly people,

with major problems (I3), as exemplified by Smith et al. (2020), in their study, which highlights some spas in Hungary that have adopted a set of measures to attract a young public (18-25 years old) with the creation of night parties, demonstrating the importance of including all age groups in this activity sector.

Although the visitor's profile tends to be changing, one of the great innovations of the concept, according to Gianfaldoni et al. (2017), was the extraordinary connection of the classical concept to the concept of wellness with the ever-increasing activities in this new spa tourism.

Particularly talking about of the length of stay, one of the strongest characteristics of health tourism is that it is a segment where the stay is higher than any other type of tourism and can "boost the local economy" since it is normally located outside the big cities (Alén et al., 2006 cited by Brandão et al., 2021), and is only possible if there is more time, 2-3 weeks, available for traditional medical interventions (I7). However, some interviewees mention that younger markets cannot have a long stay in one trip, which is having an impact on the demand for this sector, therefore a market that tends to decrease the number of days of their stay, 4-5 days (I3, I6), thus contradicting what the authors have been addressing about the length of stay in the sector.

Therefore, it is necessary to create a set of services and products that allow visitors to enjoy more and stay longer, beyond what they spend on a treatment, for example, some interviewees consider that for spas to be complete they must be able to have other tourism products integrated or partnerships, so that a person with a high average stay, ranging from 10/12/14 days treatments, can visit other things and do other things, which is natural (I10, I3, I1).

As mentioned in the literature review chapter, in recent decades, and especially in the 21st century, spas have undergone a reinvention, with new concepts and services adapted to current needs, such as physical and psychological well-being. Hotels and resorts have become important wellness centers, betting on spa facilities, whose goal is to attract more customers by offering quality therapies at reasonable prices. The traditional health services of spas have been replaced by the

popularity of services that seek to establish a balance and satisfy healthy lifestyles, such as reducing stress and counteracting the recent problems of today's society (Anaya-Aguilar et al., 2021). Through the analysis of the interviews in the previous chapter, they consider the importance of creating new services in the face of current demand, with strategies to attract new markets, and more cooperation between areas such as sports, nutrition, and even medical fields, be they psychic or physical.

Among the interviews a number of innovative services/products are highlighted, such as: "*Creation of several thematic baths, new treatment circuits and also the creation of a thermal cosmetics line*" (I4); "*New products to complement the thermal cure associated with nature and well-being, bio-healthy menus, tourist routes, exercise plans*" (I7); "*The development of the Your Wellness Story product can help individual service providers as well as destination management bodies to re-establish their position in the market.*" (I6); "*a "Skin Clinic" is also being developed, in order to take advantage of the properties of hyposaline waters, offering a treatment service for skin diseases, more complete, cooperating with a nutritionist, psychologist and dermatologist*" (I4) or "*Creating a project that would be like a thermal clinic, changing the paradigm that thermal baths are for the elderly with major problems, that is, a place that would not just be for treating an illness, but a place of prevention, a place where we can go continuously*" (I3).

All these services/products demonstrate the importance that, increasingly, thermal centers need to adapt to the demand that currently exists, affirming what the literature and the interviewees argue for reinventing and adapting the offer.

According to data obtained in the interviews, the spa sector is currently faced with several challenges and limitations. As some authors have already mentioned, such as, Godbey (2009) cited by Šušić & Dimitrijević, (2015) the high level of stress accumulated and experienced daily has resulted in various cardiovascular problems, colds, obesity, and various types of cancer, all of which are detrimental to our quality of life, which leads the industry to create a set of activities to respond to these health problems, since this type of preventive treatment is not supported by the national health system. (I1) However, a good example of support is the

Institute of Major and Social Services (IMSERSO), which is an agency of the Spanish security system responsible for managing social services for the elderly. One of many services available is to include stays in spas for the elderly to try to provide a better quality of life, and this social spa program is supported by the Spanish government.

In Roman times, thermalism was exclusively for the use of citizens with greater financial power, the baths were private to less financially well-off citizens of the time, as the poor (Rotherham, 2012), and currently Spas are still seen as luxury services so they will not be visited as much, which as in Roman times may be associated with financial power once again, where wellness is expensive and not state subsidized, so it is not affordable for everyone, older pensioners or those with a low income in Eastern Europe (I2), another limitation of modern times.

Although some authors say that the baby-boom generation has the highest disposable income and the highest propensity to travel to these destinations (Brandão et al., 2021; Quintela et al., 2016), there are those who claim that it exists “*lack of disposal income in this region (CEE) which will worsen with inflation*” (I2) leading to less consumption of these products, by the older generations, due to lack of economic conditions. Despite the prominence that Thermalism has been gaining, it should be recognized that it is traditionally a geological resource of well-being and should not be marketed as a commodity directed to rich markets of society (Bandeiras, 2019) .

According to the interviewees, one of the sector's challenges is also the maintenance of its spaces. The fact that they are facilities that require a lot of maintenance, due to their machines, and where the thermal water is very corrosive and causes constant installation problems. With the new demands of the market and lifestyles, thermal tourism has adapted to the interests of the communities, developing new techniques as well as investing in thermal infrastructures (Bandeiras, 2019), making the application of capital for the renovations of the facilities the main limitation (I3).

Seasonality is one of the most felt factors by all the interviewees since it is common to all. In other hand, there are different opinions on the subject, in that seasonality is not relevant in today's spa facilities (I6), and on the other hand, that there is less seasonality in spas than in other sectors because there are good experiences (I2).

Another opinion arises regarding the services that each space offers, that is, *“there are facilities that do just wellness, others just medical, others both. In the case of medical services, they tend to be used in the spring, winter and autumn months. Seasonality affects them very differently especially if these services were offered in a hotel environment and not in a standalone facility”* (I6)

As also mentioned by the interviewee 10, where shows that seasonality also depends on the types of segments that the establishments offer, for example, the therapeutic one is still very seasonal, the wellness one is not, although it has a peak in the summer it is much less seasonal, being able to have a demand the same throughout the year and in the rehabilitation medicine one, although with some peak in the summer, it is less seasonal.

In the past the months of greatest concentration were the summer months, and currently it is September, October (I1, I9). What can be confirmed and according to some research, there is still a strong concentration in the months of July, August and September. The focus on wellness, with the increase in the period of operation and an increase in demand for health and wellness tourism has led to a decrease in seasonality (Gonçalves & Guerra, 2019).

Thermalism has assumed a decisive role in the quality of life and sleep, and nowadays it is not only associated with a therapeutic component, a “classic thermalism”, but comprises a more preventive approach aimed at health promotion and prevention of future diseases, a “wellness thermalism” (Pereira et al., 2021). The wellness concept allowed spas to reformulate their image, sometimes associated with therapies and treatment of patients, and become important destinations for wellness tourism. In addition, the concept of wellness is currently considered one of the methods of preventing future diseases in increasingly aging societies, and aggregates a holistic approach that aims at the

mental and spiritual harmony of the human being (Erfurt-Cooper, Cooper, 2009 cited by Šušić & Dimitrijević, 2015).

In this sense, opinions arise, that, the *“Wellness or health have always been inclusive, and the holistic perspective is not new either”* and *“The challenge is to position thermalism as what it is, as wellness, health prevention, with professionals.”* (I6, I3)

Since they are places specialized in providing this psychophysiological comfort and well-being and whose goal is to attract more customers by offering quality therapies at reasonable prices (Anaya-Aguilar et al., 2021; Hladkyi et al., 2021; Mainil et al., 2017) there is a growing need to specialize (I10).

One of the big problems that has been highlighted is related to human resources. To have a *“good positioning, in the coming years”* it is necessary to invest in training and recruitment of human resources (I10), since *“Human resources in the company are the most important assets to run the company’s operational cycle”* (Atmadja et al., 2021).

Continuing along the same line of thought, from the holistic perspective, some authors manage to divide consumers into 3 groups, those who consume traditional medical tourism, those who consume wellness, and those who consume complex medical treatments (Spasojevic, Susic, 2010 cited by Šušić & Dimitrijević, 2015), which confirms the opinion of interviewee 10, who states that thermal tourism can be explored in different segments.

“Therefore, several segments emerge that can be explored in thermalism: Therapeutic, with 70% of the turnover coming from therapeutic spa, then the wellness spa segment, which has been increasing exponentially in recent years, and then with another dedicated physical medicine segment (rehabilitation, physiotherapy, deeper rehabilitation)”.

Due to the unexpected outbreak of covid-19, the tourism sector was forced to slow down its activities. In this context, spa tourism was then the tourism product that had a high importance and a health dimension that complemented and mitigated the effects of the pandemic, in the recovery phase (Pinos Navarrete & Shaw, 2021).

The need for treatments around spas, on the positive side has come to benefit the spa, both in preventing and curing disease (I1), although the pandemic period led to the stagnation of tourism businesses and health tourism took the opportunity and developed under the impact of the pandemic (Cheng et al., 2021)

According to the interviewees, lock-downs should be used for development, for a re-evaluation of products that already exist, the industry should strengthen after pandemic better products to be able to maintain the current level of demand (Cheng et al., 2021). Although the health tourism has demonstrated its high importance in relieving the current pressure experienced and how to relax the body and mind, cannot forget that the most important thing is the communication, the transmission of a continuous safety, quality and excellence of the services provided (I6, I10). Spa spaces should seek to reopen with quality and safety in their services, and seize the moment to open new horizons (Pinos Navarrete & Shaw, 2021).

A set of "*post-COVID packages in spas and wellness facilities (retreats) that dealt with fatigue or immune boosting*", (I2), and wellness services, psychological and physical, were thus created, valued even more due to the pandemic period, as well as nature activities and sports.

One of the difficulties of spa spaces during the pandemic was their association with the spread of the disease. Even so, some refer that this association should not be related to the water, but to the proximity of people, where in some cases it was reported that "*was communicate with the doctors, who had experience in medical biology, who gave their view that the waters, or bathing in a pool, or having a massage would not be a risk*"(I3).

During the interviews there was an interesting perspective, from one of the interviewees (I10), about the standardization of the thermal offer at a European level. The same refers to different positions at European level, at the government level of spas and operators, and highlights the lack of standardization of services, health policy, and understand where the thermalism fits as a health promoter. He exemplifies some countries in Europe, like France, which "seriously bets on thermalism as a health activity, therapeutic, as a complementary activity to

pharmacology and this posture is a national goal", or "other countries in Europe that take more of a tourism perspective, like Spain, or Germany that takes on a health promotion one, and other countries in central Europe". With this, the interviewee highlights Portugal, establishing a critical note on the current system and its positioning, suggesting a reflection on the legislative framework and the posture on thermalism in the country. A further consideration is left to the government, which should try to understand what it wants from the spas, in terms of financial support, and where states that "there is room for everything, but not for everything mixed".

As identified, then, there is a whole consensus of some information between what the literature, although scarce/limited, says and what happens in practical terms regarding the evolution and transformation of health tourism in wellness. An example of this is Figure 15, which identify some words in the analysis, showing which were the most common during the investigation.

Figure 15- Word cloud of key themes addressed in all interviews



Source- Own elaboration

9- Conclusions

- **Practical contribution of the work**

This work allowed to explore the concept of wellness that is increasingly present in today's thermalism, as well as in all health tourism, reinforcing the need for destinations to create opportunities to satisfy a tourist that seeks more often these places of tranquility, far from large urban centers. To achieve the main objective, a set of specific objectives were outlined, such as, understanding the challenges and strategies of the sector during and after covid-19, understanding the profile of demand in Europe today, exploring the changes in the use of thermalism and its valuation, understanding the existence of the adaptation of supply to existing demand, and establishing a critical note on the changes in today's classical thermalism.

To achieve these objectives, a qualitative approach was selected that focused on the application of 10 semi-structured interviews to various stakeholders, via zoom, and responsible for the various establishments, in order to know their perspective on the evolution and transformation of thermal tourism.

The results show a trend that has long been verified, a lower demand for what is now called, by some researchers, the "classic thermalism", by a greater demand for the so-called "wellness thermalism".

In this sense, this dissertation focuses on the analysis of the past, present and future of the tourism industry, more specifically, the health tourism sector, where thermal tourism still has a considerable weight in its revenues worldwide.

It is also important to highlight that, the main advantage of this research study is the diversity of the analysis in covering five European countries, the main tourism markets in Europe. The different perspectives of the various stakeholders, from entrepreneurs, to researchers, to spas directors, made the study even richer, taking into account the cultural differences between some regions.

- **Main conclusions**

Objective: To understand the challenges and strategies of the industry during and after covid-19

Regarding the challenges that the industry experienced during covid-19, all interviewees identified a few challenges, such as, the increased expenses associated with the disease (masks, disinfectants, electricity), the lack of investment in the area, the high maintenance costs of the machines due to the corrosiveness of the water, and the fact that wellness is still associated with luxury products, so it is not available to everyone. However, few authors mention these kinds of challenges experienced during the pandemic crisis.

Despite the challenges that the pandemic brought to the industry, one of the main strategies revealed by the interviewees was good communication. The importance of continuous post-covid communication about the safety of the places and the preservation of excellent services helped to restore some confidence to consumers, who still associated these sites with the greater spread of the disease. The use of social media (TV, social networks, radio, among others) was also considered by the interviewees to promote their products and services.

Also revealed by the interviewees, the pandemic also helped in the creation of products and services, more oriented to physical and psychological well-being, thus rethinking their offerings. Which is justified by the authors Cheng et al. (2021) and Pinos Navarrete & Shaw (2021) who affirm the importance that these lock-downs have for the re-evaluation of services and the opening to new horizons.

Objective: Understand the demand profile in Europe today

In what concerns the identification of a profile of demand in Europe, it was notable that we obtained mostly unanimous answers, with a profile still popularly connected to retired people or older people. Even so, some still consider a profile that is between 40 and 55 years old, others consider a greater demand for an age group over 55, and we still have some cases that refer that there is more demand for couples, which may range from 30-50 years old, and with children.

In addition, the study participants refer that, although there is still a strong connection of this sector to older people, the fact is that there has been a change, with younger audiences wanting to take care of their body and mind more and more. In this sense, it has been proven by several authors that prevention is not only associated with older people, but also with young populations, who seek solutions to reduce the daily stress experienced and harmony between their body and mind (Tzedopoulos et al., 2018; Branco 2019; Smith et al., 2020).

Addressing the length of stay, the interviewees were able to identify some market trends, on the one hand, a tendency to stay between 4 to 5 days, very much associated to younger markets, which cannot spend much time in a single trip. On the other hand, a tendency to stay between 2 to 3 weeks, still associated with more complete medical treatments, and mostly carried out by senior markets, who have more free time.

The last trend is the one that is the most proven by several authors, who highlight the sector for being one of the ones with the longest stay. However, this stay is only successfully fulfilled if it is possible to offer more experiences to consumers, thus increasing their stay in a destination, stimulating the local economy (Alén et al., 2006 cited by Brandão et al., 2021).

Objective: Explore the changes in the use of thermalism and its valorization

According to most of the interviewees, there is indeed a change when approaching the word "thermalism". Associated with treatments with mineral waters and in places such as spas, its valuation has changed over time. There is a growing concern and a bet on the improvement of human resources training, capable of responding to a much more specialized need, focused on well-being.

The positioning of thermalism today is more based on health prevention, with dedicated professionals from various areas, such as nutrition, medicine, and others.

Although it is highlighted by some that the holistic perspective is no longer new, nowadays most spas or thermal resorts already assume a decisive role in the quality of life and comprise a more preventive dimension of future diseases. In

other words, there is a greater association of thermalism with prevention and continuous health care, rather than a merely therapeutic component. What is also justified by some authors is that thermalism aggregates a holistic approach that aims at the mental and spiritual (Pereira et al., 2021).

Objective: Understand the existence of the adaptation of supply to existing demand

Regarding the existence of an adaptation of the supply over the demand, it is referred in the interviews a set of services created, as well as a set of products that have been great bets to attract new markets. Projects were identified, such as the development of a skin clinic or thermal clinic, associating cosmetics and thermalism, where the use of water properties can be a great advantage. Projects that intend, besides promoting the treatment of diseases, to be spaces of prevention and where continuous attendance is possible.

Besides the projects, the creation of new products, interconnected with sports, nature, and nutrition, has been a complement to the thermal offer, with the main goal of attracting audiences that are increasingly interested in physical exercise, healthier eating habits, and a better quality of life.

It was possible through the interviewees to identify this adaptation, which is in line with what is advocated once again by the literature, that in the 21st century spas have undergone a reinvention, with new concepts and services adapted to current needs, such as physical and psychological well-being, in order to reduce the recent problems of today's societies (Anaya-Aguilar et al., 2021).

Objective: Establish a critical note on the changes in classical thermalism today

The last objective of the present study suggests establishing a critical note on the changes in today's classical thermalism. Related only to the use of thermal waters, classic thermalism has been revolutionized with modernization and a more complete set of experiences that go far beyond the use of only the properties of thermal waters.

The potential that spa tourism represents, according to the interviewees, makes it a sector where the combination of various experiences can make it more competitive among other tourism sectors.

Currently, and analyzed during the interviews, all the spas work with various segments, which confirms a change from a classic spa to a more "modern" spa, where can be find, in addition to a therapeutic focus, a focus on well-being and medical rehabilitation. The importance of partnerships and modernization of services, as mentioned by the interviewees, arises to combat the usual treatments of thermal waters, and offer more opportunities for consumers to enjoy a better-quality experience, with other options, beyond the so-called "classic" ones.

9.1- Limitations

The present research presented some difficulties during its development.

The first limitation was the difficulty in finding studies on the subject, both internationally and nationally. However, the interest in this approach has been growing over the years.

Second, the data collection process was not always easy. Regarding the interviews, the unavailability or lack of interest from some interviewees made it difficult and created a huge delimitation in the study. It is possible to highlight Italy as one of the main limitations of the study, since it was not possible to conduct any interview with any Italian manager in charge, making it difficult to perceive that spa destination. About the interviews performed, the initial goal of this study was to conduct a focus group, to cover more interaction and exchange of ideas, which was not possible to achieve, and only 10 interviews were implemented.

Finally, the size of the study, at a national and international level, also made data collection difficult, where it was not possible to obtain more information.

9.2-Future research

This topic is intended as recommendations for future research within the same theme. These suggestions may continue the present study, exploring other perspectives, using other methodological approaches, or even apply to other destinations.

It is important to continue to proceed with new investigations, allowing for the construction of a more solid scientific knowledge around thermalism, in the area of well-being, with a strong focus on statistical data.

It is suggested to future researchers in the area, the possibility of continuing this study, highlighting the importance for a different method, but interesting to achieve, through a focus group, initially thought. It will allow the gathering of a group of participants, with different cultures, habits, lifestyles, and economic power to discuss, in a conference, added more destinations, a theme that has lately gained more prominence.

Another suggested study, but more difficult to carry out given the geographical barrier, focuses on applying research in a non-European context, allowing the analysis of differences on wellness, on the level of supply and demand.

In addition to the previous proposals, a study based on a quantitative approach, through the application of questionnaires, is recommended. They should be applied mainly to tourists or to all those who enjoy and increasingly seek wellness products and services. Their application will allow us to understand the motivations and the perception of spa tourism today.

Finally, it is highlighted the relevance of conducting a study, more in-depth and accompanied, on the Portuguese thermal tourism, with the main objective of exploring and understanding the positioning of Portugal in relation to spas and the sector, at the level of future strategies in the medium and long term, but also the new trends.

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ANNEXES

ANNEX I - Informed consent (Portuguese)

Consentimento informado

Entrevista sobre Turismo de saúde e bem-estar no contexto europeu - tendências da oferta e da procura

O estudante Paulo André Ferreira Neto, a frequentar o Mestrado de Gestão do Turismo, da Escola Superior de Hotelaria e Turismo, do Instituto Politécnico do Porto, visa proceder a uma sessão de discussão temática sob orientação da Professora Doutora Dália Liberato e da Professora Doutora Joana Quintela com vista a explorar a transformação e evolução do conceito de Turismo Termal na vertente Wellness, estabelecendo uma nota crítica sobre a prática de um termalismo menos clássico na atualidade.

Para tal, é solicitado a sua participação através da resposta a um conjunto de questões já definidas e apresentadas antecipadamente num guião de entrevista.

Todos os dados pessoais serão tratados com confidencialidade e privacidade. Apenas os dados que forem recolhidos e tratados serão tornados públicos para fins académicos. Pretende-se com esta sessão um maior aprofundamento da informação que contribuirá para o desenvolvimento da investigação, posteriormente partilhada com toda a comunidade.

Para qualquer outro esclarecimento poderá contactar o estudante através do email: pauloandreneto30@hotmail.com.

Agradecemos desde já a sua colaboração e disponibilidade.

Vila do Conde, ___ ___ 2022

Nome do entrevistado: _____

Assinatura: _____

Data: ___ / 08 / 2022

ANNEX II – Informed consent (English)

Informed Consent

Interview on Health and Wellness Tourism in the European context - supply and demand trends

The student Paulo André Ferreira Neto, attending the Master of Tourism Management, School of Hospitality and Tourism, Polytechnic Institute of Porto, aims to proceed to a thematic discussion session under the supervision of Professor Dália Liberato and Professor Joana Quintela to explore the transformation and evolution of the concept of Thermal Tourism in the area of Wellness, establishing a critical note on the practice of a less classical thermalism today.

To do this, they are asked to participate by answering a set of questions already defined and presented in advance in an interview script. The session will be recorded for later transcription, and your participation is voluntary.

All personal data will be treated with confidentiality and privacy. Only the data that is collected and processed will be made public for academic purposes. This session is intended to provide further information that will contribute to the development of the research, later shared with the entire community.

For any other clarification you may contact the student through email: pauloandreneto30@hotmail.com.

We thank you in advance for your collaboration and availability.

Vila do Conde, ____ ____ 2022

Name of interviewed:

Signature: _____

Date: ___ / 08 / 2022

ANNEX III- Informed consent (Italian)

Consenso informato

Intervista sul turismo della salute e del benessere nel contesto europeo - tendenze della domanda e dell'offerta

Lo studente Paulo André Ferreira Neto, frequentante il Master in Management del Turismo, Scuola di Ospitalità e Turismo, Istituto Politecnico di Porto, si propone di procedere a una sessione di discussione tematica sotto la guida delle professoresse Dália Liberato e Joana Quintela al fine di esplorare la trasformazione e l'evoluzione del concetto di Turismo Termale nel Benessere, stabilendo una nota critica sulla pratica di un termalismo meno classico oggi.

A tal fine, la vostra partecipazione è richiesta rispondendo a una serie di domande già definite e presentate in anticipo in un copione di intervista.

Tutti i dati personali saranno trattati in modo confidenziale e privato. Solo i dati raccolti ed elaborati saranno resi pubblici per scopi accademici. L'intento di questa sessione è quello di approfondire ulteriormente le informazioni che contribuiranno allo sviluppo della ricerca, successivamente condivisa con l'intera comunità.

Per qualsiasi altro chiarimento è possibile contattare lo studente via e-mail:

pauloandreneto30@hotmail.com

Vi ringraziamo in anticipo per la vostra collaborazione e disponibilità.

Vila do Conde, ____ 2022

Nome dell'intervistato: _____

Firma: _____

Data: ___ / 08 / 2022

ANNEX IV- Informed consent (French)

Consentement éclairé

Groupe de discussion sur le tourisme de santé et de bien-être dans le contexte européen -
tendances de l'offre et de la demande

L'étudiant Paulo André Ferreira Neto, participant au Master de Gestion du Tourisme, Ecole d'Hospitalité et de Tourisme, Institut Polytechnique de Porto, a l'intention de procéder à une session de discussion thématique sous la supervision du Professeur Dália Liberato et du Professeur Joana Quintela pour explorer la transformation et l'évolution du concept de Tourisme Thermal dans le domaine du Wellness, en établissant une note critique sur la pratique d'un thermalisme moins classique aujourd'hui.

A cette fin, il leur est demandé de participer en répondant à une série de questions déjà définies et présentées à l'avance dans un script d'interview.

La session sera enregistrée pour une transcription ultérieure, et votre participation est volontaire.

Toutes les données personnelles seront traitées de manière confidentielle et privée. Seules les données collectées et traitées seront rendues publiques à des fins académiques. Cette session est destinée à fournir des informations complémentaires qui contribueront au développement de la recherche, partagée ensuite avec l'ensemble de la communauté.

Pour tout autre éclaircissement, vous pouvez contacter l'étudiant par e-mail : pauloandreneto30@hotmail.com.

Nous vous remercions d'avance pour votre collaboration et votre disponibilité.

Vila do Conde, ___ ___ 2022

Nom de l'interviewé :

Signature: _____

Date : ___ / 08 / 2022

ANNEX V- Interview script (Portuguese)

Guião da entrevista

Apresentação do estudo: Este trabalho constitui a componente empírica da tese de Mestrado em Gestão Turística. Para tal, é essencial realizar entrevistas com especialistas do sector do turismo termal e o trabalho final irá complementar os dados primários recolhidos durante o estudo empírico.

Objetivos: O principal objetivo desta investigação é explorar a transformação e evolução do turismo termal na área do wellness. Para alcançar o objetivo principal, são apresentados os seguintes objetivos específicos:

- Compreender os desafios e estratégias do sector durante e após a covid-19;
- Compreender o perfil da procura na Europa de hoje;
- Explorar as mudanças no uso do termalismo e a sua valorização;
- Compreender a existência da adaptação da oferta à procura existente;
- Estabelecer uma nota crítica sobre as mudanças no termalismo clássico de hoje.

Dados sociodemográficos e apresentação individual

Perguntas:

- Pode apresentar-se (nome, idade, qual a sua posição agora...)?
- Qual é a sua qualificação académica?
- Qual é a sua experiência profissional (anos de serviço, tipos de instituições...)?

Análise do estudo

Objetivos:

- Recolher dados sobre o conceito de spa e turismo de bem-estar;

- Reunir informações para completar o estudo.
- Compreender os desafios e estratégias do sector durante e após a covid-19;
- Conhecer o perfil da procura na Europa de hoje;
- Explorar as mudanças na utilização do termalismo e a sua valorização;
- Compreender a existência da adaptação da oferta à procura existente;
- Estabelecer uma nota crítica sobre as mudanças no termalismo clássico de hoje.

Perguntas:

1. Identifica no seu estabelecimento que tipo de segmentos?
2. Tendo em conta a flutuação da procura ao longo dos anos, tem sentido que a sazonalidade tem vindo a estagnar-se?
3. Há uma diminuição em termos de peso total dos que vão por recomendação médica e um aumento na proporção dos que vão por outras razões, nomeadamente relaxamento, bem-estar, mas sem receita médica?
4. Que serviços e comunicação considerou importantes durante e após a covid-19?
5. Nos últimos tempos, enfrentando novos desafios, tem introduzido novos serviços diversificando a oferta?
6. Está atualmente a investir, adaptando a oferta à procura, diversificando com uma estratégia para atingir um público maior, e em que medida? (Se têm novos projetos ou projetos a médio e longo prazo e quais são os seus objetivos)
7. Quais são as suas limitações nesta área?
8. O bem-estar e a saúde são cada vez mais transversais, incluem cada vez mais atividades e dimensões, uma perspetiva mais holística, como é que o seu estabelecimento reage a esta realidade?
9. Para tornar as experiências mais completas, está disposto e tem sinergias/parcerias (Cultura, natureza, gastronomia, vinho, entretenimento turístico, outras atividades)?
10. Atualmente a modernização ou a existência de uma grande procura de novos serviços, tais como o bem-estar alimentar ou psicológico, são grandes desafios, mas que tipo de desafios identifica atualmente?

ANNEX VI- Interview script (English)

Interview script

Presentation of the study: This work constitutes the empirical component of the Master's thesis in Tourism Management. To this end, it is essential to conduct interviews with experts in the spa tourism sector and the final work will complement the primary data collected during the empirical study.

Objectives: The main objective of this research is to explore the transformation and evolution of spa tourism in the area of wellness. To achieve the main objective, the following specific objectives are presented:

- To understand the challenges and strategies of the sector during and after covid-19;
- To understand the profile of demand in Europe today;
- Explore the changes in the use of thermalism and its valuation;
- Understand the existence of the adaptation of supply to existing demand;
- Establish a critical note on the changes in today's classical thermalism.

Sociodemographic data and individual presentation

Questions:

1. Can you introduce yourself (name, age, what is your position now...)?
2. What is your academic qualification?
3. What is your professional experience (years of service, types of institutions...)?

Analysis of the study

Objectives:

- To collect data on the concept of spa and wellness tourism;
- Gather information to complete the study.
- Understand the challenges and strategies of the industry during and after covid-19;
- Know the profile of demand in Europe today;
- Explore the changes in the use of thermalism and its valuation;

- Understand the existence of the adaptation of supply to existing demand;
- Establish a critical note on the changes in classical thermalism today.

Questions:

1. do you identify in your establishment what type of segments?
2. Given the fluctuation in demand over the years, have you felt that seasonality has been stagnating?
3. Is there a decrease in terms of total weight of those who go for medical recommendation and an increase in the proportion who go for other reasons, namely relaxation, wellness, but without prescription?
4. What services and communication did you consider important during and after covid-19?
5. In recent times, facing new challenges, have you introduced new services diversifying the offer?
6. Are you currently investing, adapting the offer to the demand, diversifying with a strategy to reach a larger audience, and to what extent? (If you have new projects or medium- and long-term projects and what are your goals)
7. What are your limitations in this area?
8. Wellness and health are more and more transversal, they include more and more activities and dimensions, a more holistic perspective, how does your establishment react to this reality?
9. To make the experiences more complete, are you willing and do you have synergies/partnerships (Culture, nature, gastronomy, wine, tourist entertainment, other activities)?
10. Currently modernization or the existence of a great demand for new services, such as food or psychological wellness, are great challenges, but what kind of challenges do you currently identify?

ANNEX VII- Interview script (Italian)

Allegato I - Guida alle interviste

Presentazione dello studio: Questo lavoro costituisce la componente empirica della tesi di laurea del Master in Management del Turismo. A tal fine, è essenziale la realizzazione di interviste a specialisti del settore del termalismo e il lavoro finale integrerà i dati primari raccolti durante lo studio empirico.

Obiettivi: L'obiettivo principale di questa ricerca è quello di esplorare la trasformazione e l'evoluzione del turismo termale nell'area del benessere. Per raggiungere l'obiettivo principale, vengono presentati i seguenti obiettivi specifici, quali:

- Comprendere le sfide e le strategie del settore durante e dopo la crisi;
- Comprendere il profilo della domanda in Europa oggi;
- Esplorare i cambiamenti nell'uso del termalismo e la sua valorizzazione;
- Comprendere l'esistenza dell'adattamento dell'offerta alla domanda esistente;
- Stabilire una nota critica sui cambiamenti del termalismo classico al giorno d'oggi.

Dati sociodemografici e presentazioni individuali

1. Può presentarsi (nome, età, posizione attuale...)?
2. Qual è il suo titolo di studio?
3. Brevemente, qual è la sua esperienza professionale (anni di servizio, tipi di istituzioni...)?

Analisi dell'argomento oggetto di studi. Obiettivi:

- Raccogliere dati sul concetto di turismo termale e benessere;
- Raccogliere informazioni per completare lo studio.
- Comprendere le sfide e le strategie del settore durante e dopo la crisi;
- Conoscere il profilo della domanda in Europa oggi;
- Esplorare i cambiamenti nell'uso del termalismo e la sua valorizzazione;

- Comprendere l'esistenza dell'adattamento dell'offerta alla domanda esistente;
- Stabilire una nota critica sui cambiamenti del termalismo classico al giorno d'oggi.

Domande:

1. Nella sua struttura, individua che tipo di segmenti?
2. Considerando la fluttuazione della domanda nel corso degli anni, ha avuto la sensazione che la stagionalità tenda ad attenuarsi o a stabilizzarsi?
3. C'è una diminuzione in termini di peso totale di coloro che si recano per una raccomandazione medica e un aumento della percentuale di coloro che si recano per altri motivi, ovvero relax, benessere ma senza prescrizione medica?
4. Quali servizi e comunicazioni ha trovato importanti durante e dopo la covida?
5. Negli ultimi tempi, di fronte alle nuove sfide, avete introdotto nuovi servizi diversificando l'offerta?
6. Attualmente state investendo, adattando l'offerta alla domanda, diversificando con una strategia per raggiungere un pubblico più ampio, e in che misura? (Se avete nuovi progetti o progetti a medio e lungo termine e capire quali sono i loro obiettivi)
7. Quali sono i vostri limiti in questo settore?
8. Il benessere e la salute stanno diventando sempre più trasversali, includono sempre più attività e dimensioni, una prospettiva più olistica, come reagisce la vostra struttura a questa realtà?
9. Per rendere le esperienze più complete, siete disposti e avete sinergie/partnership (cultura, natura, gastronomia, vino, intrattenimento turistico, altre attività)?
10. Attualmente la modernizzazione o l'esistenza di una forte domanda di nuovi servizi, come il benessere alimentare o psicologico, sono grandi sfide, ma voi che tipo di sfide individuate/attualmente affrontate?

ANNEX VIII- Interview script (French)

Script de l'interview

Présentation de l'étude : Ce travail constitue la composante empirique du mémoire de master en management du tourisme. Pour ce faire, il est indispensable de réaliser des entretiens avec des experts du secteur du tourisme thermal et le travail final viendra compléter les données primaires recueillies lors de l'étude empirique.

Objectifs : L'objectif principal de cette recherche est d'explorer la transformation et l'évolution du tourisme thermal dans le domaine du bien-être. Pour atteindre l'objectif principal, les objectifs spécifiques suivants sont présentés :

- Comprendre les défis et les stratégies du secteur pendant et après la covid-19 ;
- Comprendre le profil de la demande en Europe aujourd'hui ;
- Explorer les changements dans l'utilisation du thermalisme et sa valorisation ;
- Comprendre l'existence de l'adaptation de l'offre à la demande existante ;
- Établir une note critique sur les mutations du thermalisme classique d'aujourd'hui.

Données sociodémographiques et présentation individuelle.

Questions :

1. Pouvez-vous vous présenter (nom, âge, quelle est votre fonction actuelle...)?
2. Quelle est votre qualification académique?
3. Quelle est votre expérience professionnelle (années de service, types d'institutions...)?

Analyse de l'étude

Objectifs :

- Recueillir des données sur le concept de tourisme de spa et de bien-être ;
- Recueillir des informations pour compléter l'étude.
- Comprendre les défis et les stratégies de l'industrie pendant et après la covid-19 ;

- Connaître le profil de la demande en Europe aujourd'hui ;
- Explorer les changements dans l'utilisation du thermalisme et sa valorisation ;
- Comprendre l'existence de l'adaptation de l'offre à la demande existante ;
- Établir une note critique sur les mutations du thermalisme classique aujourd'hui.

Questions:

1. Identifiez-vous dans votre établissement quels types de segments ?
2. Compte tenu de la fluctuation de la demande au fil des années, avez-vous eu le sentiment d'une stagnation de la saisonnalité ?
3. y a-t-il une diminution en termes de poids total de ceux qui se rendent pour une recommandation médicale et une augmentation de la proportion de ceux qui s'y rendent pour d'autres raisons, à savoir la détente, le bien-être, mais sans prescription ?
4. Quels sont les services et la communication que vous avez considérés comme importants pendant et après la covidée 19 ?
5. Ces derniers temps, face à de nouveaux défis, avez-vous introduit de nouveaux services en diversifiant l'offre ?
6. êtes-vous en train d'investir, d'adapter l'offre à la demande, de vous diversifier avec une stratégie visant à atteindre un public plus large, et dans quelle mesure ? (Si vous avez de nouveaux projets ou des projets à moyen et long terme et quels sont vos objectifs).
7. Quelles sont vos limites dans ce domaine ?
8. Le bien-être et la santé sont de plus en plus transversaux, ils incluent de plus en plus d'activités et de dimensions, une perspective plus holistique, comment votre établissement réagit-il à cette réalité ?
9. Pour rendre les expériences plus complètes, avez-vous la volonté et avez-vous des synergies/partenariats (culture, nature, gastronomie, vin, animation touristique, autres activités) ?
10. Actuellement, la modernisation ou l'existence d'une grande demande de nouveaux services, comme l'alimentation ou le bien-être psychologique, sont de grands défis, mais quels types de défis identifiez-vous actuellement ?