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Health and Wellness Tourism: An Overview of Thermal Tourism in Portugal

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ABSTRACT

Over the last decades there has been a growing concern about health, mainly from the population of more developed countries. Health and wellness tourism are growing exponentially and show a great potential worldwide, having also become a strategic product in Portuguese tourism. This study carries out a general approach to health and wellness tourism, its evolution and segmentation worldwide, with special attention to the case of thermal tourism in Portugal. The study object is the potentiality of Portugal as a thermal tourism destination, through the characterisation of its history, supply and demand and aims to evaluate the thermal resources present in the intervention area. The methodology adopted was based on an exploratory and mixed methods approach that integrates qualitative elements and quantitative research, specifically based on a bibliographical review and a case study based on a qualitative and quantitative analysis of secondary data concerning the subject. The findings allow an in-depth understanding of the evolution and current state of thermal tourism, providing a comprehensive basis for the development of strategies adapted to the present demand of thermal spas in Portugal.

KEYWORDS

Health and Wellness Tourism, Thermal Spas, Thermalism, Thermal User's Profile, Portuguese Thermal Tourism.

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1. Introduction

Interest in all aspects of health and wellness has grown exponentially all over the world. Consumers are now looking for new ways to achieve a healthy lifestyle, better quality of life and well-being, particularly after the COVID-19 pandemic. The sharp expansion of health and wellness tourism worldwide has led to a more intense competition among the sector's suppliers, as they strive to make the customers' experience more affordable and serve a broader spectrum of increasingly discerning clients.

From a scientific perspective, it is proven that thermal tourism contributes to a complete state of well-being, both physically and psychologically. Portugal has at its disposal not only a wide range of thermal resources, with a greater focus on therapy, but also several sophisticated spa and wellness facilities. These thermal resorts are present in a large part of the country, with special emphasis in the North and Centre regions, where a great hydrogeological wealth is concentrated. Over the last years, they have emerged as an alternative to sun and beach tourism, becoming a place not only for the cure of pathologies, but also as a refuge from the hectic daily life of the population. Given the importance of this topic to the image of Portugal as a health and wellness destination, this paper aims to conceptually examine the phenomenon of health and wellness tourism, focusing on the context of thermal spas in Portugal. The study follows the importance and evolution of health and wellness tourism worldwide to provide an overview of the thermal spa segment in the Portuguese context, thus providing important insights and cues for the development and promotion of thermal tourism products and services.

This paper follows the following structure: the introduction provides a framework for the whole paper. Then, the literature review provides a conceptual framework concerning the evolution of the health paradigm into a holistic one, followed by an analysis of the supply and demand of the sector worldwide. The third topic presents the methodology followed. The fourth part focuses on the Portuguese context, providing a conceptual overview of the thermal segment, particularly what concerns to the main steps in its evolution, the analysis of its supply and demand, and recent research on users' profile. Conclusions and future research recommendations close the study.

2. Literature Review

2.1 Health and Wellness: An Ever-Evolving Concept

Health has become a major concern in nowadays' society, with innovative health and wellness programs trying to fulfil the growing consumer demands for fitness level improvement, for healthy lifestyle education, for nutrition counselling, for healing, for preventive medicine, for solving personal problems like stress and depression, and for spiritual health (Didascalou, Lagos, & Nastos, 2009). The growing demand for health and well-being programs is closely linked to a change in the popular conception of health, particularly after World War II. In 1948 the World Health Organization defined health as a state of complete physical, mental, and social wellbeing and not merely the absence of disease of infirmity, reinforcing the evolution of the concept from a traditional view of health to a holistic wellness orientation (Bonfada, Bonfada, Gandara, & Brea, 2008; Gonçalves & Guerra, 2019). The issue of health goes beyond prevention. People have begun to take a more responsible attitude toward their health and their bodies, reinforcing a movement from the prevention of disease to the prevention of health. Consumers have become more health-conscious and aware that health is not to be taken for granted (Brandão, Liberato, Teixeira, & Liberato, 2021). Wellness may be defined as the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health (Global Wellness Institute, 2021). This definition reinforces two underlying ideas of the concept: (i) it is not a passive or static state, but a pursuit associated with intentions, choices, and actions. This dimension reinforces the importance of lifestyle, self-responsibility for health, and the exploitation of a person's potential for a better quality of health (Didascalou et al., 2009; Global Wellness Institute, 2021); and (ii) health encompasses many different dimensions, including physical, mental, emotional, spiritual, social, and environmental dimensions, which reinforces its multidimensionality as opposed to the traditional health paradigm (Global Wellness Institute, 2021; Dini & Pencarelli, 2022). The impact of consumers' growing interest in wellness activities is obvious in economic terms. According to the Global

Wellness Institute (2021) global wellness economy grew from $4.3 trillion in 2017 to $4.9 trillion in 2019, or by 6.6% annually, a growth rate significantly higher than global economic growth (4.0%).

The multidimensionality of the wellness concept has also had an impact on the way activities related to it have evolved, particularly regarding tourism. Since health and wellness are crucial societal values, they significantly affect all aspects of life and increasingly influence tourism consumption and production patterns. The field of health and wellness tourism has developed in a significant way over the past two decades and is undoubtedly an emerging, complex and rapidly-changing tourism segment (UNWTO, 2018). Even though wellness tourism is one of the fastest-growing tourism subsectors, as it offers guests a wide range of opportunities and experiences, consistency in the literature regarding the concept is still lacking. As Voigt, Brown, & Howat (2011) point out, terms such as wellness tourism, health tourism, healthcare tourism, medical tourism, holistic tourism and spa tourism, even though sometimes used interchangeably, often describe different concepts. In fact, as demand grows and several sub-sectors or niches emerge, it may be difficult to supply a comprehensive definitional framework in English language which may also be suitable to global usage (Smith & Puczkó, 2015). Joppe (2010), following the International Spa Association categorisation, presents eight primary types of spas: day spa, resort/hotel spa, destination spa, medical spa, club spa, mineral springs spa, cruise ship spa, and cosmetic spa. The growth and diversity of the terms used to identify wellness-related products mirrors not only the growth of diverse businesses offering wellness-related services, as also the different experiences that these can appeal to. This also reflects different perceptions of spas and also differences based on geographical and linguistic characteristics and a wide range of cultural traditions (UNWTO, 2018), with Europeans tending to link them with medical hydrology and therapeutic treatments and Americans linking them to health and fitness (Mak, Wong, & Chang, 2009; Joppe, 2010), for example. In the same way, as a broad multidimensional concept, wellness tourism includes varied components in its offer system. In a recent study, Dini & Pencarelli (2022) identified ten components of wellness tourism: hot springs, spas, medical tourism, care of the body and mind, enogastronomy, sports, nature and environment, culture, spirituality and events. Each of the categories identified may represent a single touristic offer aimed at market segments or be a part of a set of components within an integrated mix of tourism products. Research in the field has also highlighted obstacles to a clear categorisation of the field, namely due to the need of confidentiality or the inability of researchers to gain access to tourists in spas, hotels, or clinics, which forces the field to rely on relatively small and isolated datasets, often derived from spas (Smith & Puczkó, 2015; UNWTO, 2018) and the paucity of empirical studies that allow in-depth information about who these tourists are, what exactly they are looking for, and what is worth to them (Voigt et al., 2011).

Health tourism is usually considered an umbrella term, encompassing other subsectors as wellness and medical tourism (Smith & Puczkó, 2009; Smith & Puczkó, 2015; UNWTO, 2018; Brandão et al., 2021). Health and wellness tourism can be divided into several types, considering the motivation of tourists. Medical tourism usually deals with people who are physically rather than mentally or socially unwell (Smith & Puczkó, 2015). This segment is divided into therapeutic medical tourism, rehabilitation, recovery and cure of diseases, surgical medical tourism, cosmetic surgeries, dentists, and surgeries in various areas. It involves the use of evidence-based medical healing resources and services (both invasive and non-invasive) and may include diagnosis, treatment, cure, prevention and rehabilitation (UNWTO, 2018). Wellness tourism is a tourism activity that aims to improve and balance all of the main domains of human life, including physical, mental, emotional, occupational, intellectual and spiritual (UNWTO, 2018). In this case there is an emphasis on prevention rather than cure and it aims to improve mental and spiritual well-being and increase the capacity of individuals to satisfy their own needs and function better in their environment and society (Smith & Puczkó, 2015). It is subdivided into holistic, spiritual, yoga and meditation, leisure, beauty treatments, and sports. There are also by-products that are associated with both segments of tourism. These are related to medical wellness, therapeutic recreation, rehabilitation, and occupational wellness.

To meet the diversified and integrated wellness needs of tourism demand, a broad holistic approach is necessary (Dini & Pencarelli, 2022), but the range of opportunities that a better understanding of the supply and demand of the health tourism market may bring are obvious: wellness travelers tend to spend much more per trip than the average traveler (Global Wellness Institute, 2021); it can help to tackle seasonality as it can be integrated all year long into destination strategies and it can contribute to tourism dispersal and local development, as many facilities can be located outside the main urban centers (Antunes, 2012; UNWTO, 2018; Gonçalves & Guerra, 2019).

2.2 Health and Wellness Tourism Worldwide

Many different reasons for the exponential growth of health and wellness tourism have been identified in the literature. One of the reasons is related to population ageing (García-Altés, 2005; Joppe, 2010) with baby boomers wanting to age while maintaining their quality of life; and the healthcare system particularities (García-Altés, 2005; Laborda, 2005; Joppe, 2010; UNWTO, 2018) often characterised by long waiting lists, high costs, lack of insurance, among others, and a focus on illnesses, which causes people to try to be proactive when it comes to preventing diseases from developing the first place. Also, lifestyle changes (that influence the growth on demand for cosmetic surgery, spas, fitness centers, etc.) and tourism alternatives (with consumers that are already well-traveled trying to find something new and different in a holiday experience) have also been pointed out (García-Altés, 2005). Also, urban living associated health condition and chronic diseases are leading to a growing need and demand for healthier trips, natural alternatives and escapism (UNWTO, 2018).

As far as medical tourism is concerned, and according to the available data, the outbound market is mostly located in the United States of America, Europe, and the Middle East. According to Garcia (2015), the most advanced countries regarding this type of tourism are India, Thailand and Malaysia, as they provide modern facilities and qualified and experienced health professionals. Medical tourism has been particularly driven by over-burdened healthcare and public health insurance systems, as well as lower prices, reduced waiting lists and access to qualified professionals. Long-term care expenditure has risen over the past few decades in many advanced economies, with ageing population requiring more health and social care (UNWTO, 2018). Even though there is a recognised difficulty to estimate the size and growth of medical tourism, due to limited, fragmented and often unreliable data, as well as varying definitions of health tourism, some estimates point to a market ranging from USD 45.5 billion to USD 100 billion, depending on the source.

There is an increasing concern for health and wellness, especially by the population of more developed countries. Today, consumers are placing increasing importance on wellness, and seeking to incorporate this into their lifestyles, thus causing businesses to have a need to insert wellness into their tourism offerings and sparking the growth of wellness tourism. Wellness services related to prevention and healthy behaviors can be considered crucial to solve several critical problems in society, not only physical but also mental, such as sedentary lives, unhealthy diets, smoking or even loneliness. Wellness has become a trend and a relevant tourist factor. To meet these needs, there has been an increase in leisure-related facilities, a greater variety of food products, and the creation of innovative products and services. Also, there is greater investment by businesses and regional governments in new strategies, products, experiences, and destinations. This increase in demand has become an opportunity for some companies and tourist destinations. Wellness travel is no longer a one-sided commercial transaction aimed at the consumption of a product or service, but there is now a greater focus on the relationship with the destination and, more specifically, with local communities.

The most recent available data shows that wellness tourism expenditures reached $720.4 billion in 2019, then declining to $435.7 billion in 2020 due to the pandemic. The sector presented an 8.1% annual growth rate from 2017-2019, which is more than 50% higher than the 5.2% growth rate for overall tourism (Global Wellness Institute, 2021). According to GWI data (2021), more than 936 million international and domestic wellness trips were made in 2019, 145 million more than in 2017, then falling to 601 million trips in 2020 because of COVID-19. Even so, wellness trips accounted for 6.5% of all business trips but represented 16.2% of all expenditures in 2020, as wellness travelers tend to spend much more per trip than the average tourist.

Domestic travel accounts for most wellness trips. Among the 601 million wellness trips taken in 2020, international/inbound trips accounted for only 11% (65 million trips), while domestic trips represented 89% (536 million). Even though international wellness trips were a bit lower in 2020 due to the pandemic and consequent border closures, it is clear from the period 2017-2019 that these already accounted for most overall wellness trips. Europe remains the region with the highest number of wellness trips, while

North America maintains the higher wellness tourism expenditures (Global Wellness Institute, 2021).

Wellness tourism is highly concentrated in North America, Europe, and Asia Pacific. The United States represent 19% of all trips and account for 37% of all expenditures. The top five countries (Unites States, Germany, France, China, Japan) account for 64% of the global market, and the top 20 countries represent 87%. Portugal ranks 18th in wellness destinations, showing 4 million wellness trips in 2020 and a wellness tourism expenditure of $2.8 billion in the same year, following a $4.4 billion record in the previous year (Global Wellness Institute, 2021).

What concerns to the user profile, research is very fragmented, but a few studies stand out in the literature review, which may provide some clues concerning the health and wellness tourist profile. Mak et al. (2009) examined the underlying factors that motivate travelers to search for spa experiences while travelling in the Asian market. Most spa-goers were female, aged 26-33 years and single. The top five motivating items identified were (i) to seek physical relaxation, (ii) to pamper oneself, (iii) to reward oneself, (iv) to seek mental peacefulness and (v) to get way from the pressures of work and social life. Voigt et al. (2011) found out that in the Australian context, most wellness tourists travelled alone and the three groups of wellness tourists (beauty spa visitors, lifestyle resort visitors, and spiritual retreat visitors) are looking for a psychological, spiritual, or physical transformation of the self. They also found that there may be a significant association between the highest level of education and the wellness tourist category. Smith & Puczkó (2015) study was based on primary data collected from 420 spa and wellness facilities in more than 50 countries. The study showed that 43% of all spa and wellness customers are tourists and they have a higher dedication to health in their everyday life. International tourists seem to be predominantly motivated by the treatments and services offered, as well as the brand and reputation of the wellness and spa facilities. They often visit wellness facilities, but do not tend to stay overnight. International wellness tourists seem to be primarily motivated by treatments and therapies that are somehow based on local assets, resources, and traditions (e.g., thermal water, mud).

3. Methodology

The main aim of this research is to study the evolution of health and wellness tourism and its segmentation, with special attention to the case study of spa tourism in Portugal. To study the potentialities of Portugal as a thermal tourism destination, this study characterises the history of thermal tourism in the world and in Portugal and characterises the supply and demand in the thermal sector and evaluates the thermal resources present in the intervention area, as well as its tourism potential. In this sense, this study aims to evaluate the importance of thermal tourism as an element of health and wellness tourism, especially in the context of the case study of Portugal.

The methodology followed in this study was based on a literature review and on a case study based on a qualitative and quantitative analysis of secondary data concerning the subject under study. Thus, given the research objectives, this research followed an exploratory, mixed methods approach that integrates qualitative elements and quantitative research seeking to capitalise on the complementary nature of both methods.

Specifically, in a first phase, this study uses a literature review and, additionally in a second phase, a qualitative and quantitative approach of secondary statistical data regarding thermal tourism in Portugal was adopted as research methodology.

4. Results

4.1 Health and Wellness Tourism in Portugal

Health and wellness tourism is steadily increasing and presents a strong potential worldwide. Due to this potential, evolution and importance, health and wellness tourism has become a strategic product to the development of Portuguese tourism (Ministério da Economia e da Inovação, 2007). Portugal has at its disposal not only a wide range of thermal resources, with a greater focus on therapy but also several sophisticated spa and wellness facilities. These thermal spas are spread throughout the country, with a greater focus on the North and Center of Portugal as there is a great hydrogeological wealth in these regions.

Health and wellness tourism is seen as one of the areas with the highest tourism potential, especially in Portugal where the sea waters are appropriate to the practice of thalassotherapy, the climate is mild and there is a great diversity of thermal resources all over the country. In addition, the offer in Portugal is also seen as diversified and highly qualified, since in terms of medical tourism, Portugal has a modern and technologically well-equipped hospital network (Pereira, 2016). However, although there is a large offer, the thermal spas are not very competitive since the facilities have a "hospital" look, something that is not very attractive for tourists. In contrast, domestic spa and wellness centers have a wide variety of quality services and well-developed structures that can compete on a global level. However, they are still very few and do not differ greatly from competing destinations. In 2007, the first National Strategy Plan for Tourism (Ministério da Economia e da Inovação, 2007) included health and wellness tourism as one of the 10 strategic tourism products, which emphasises the relevance that this typology has acquired in tourist and economic terms. In the document, the spa segment is seen as one that, if properly designed and structured, can create an offer with great differentiation compared to other markets. Therefore, it is necessary to change the operating model based on treatments and have a greater focus on wellness throughout the country. Since then, and with the remodeling that was done in the spas to modernise and follow this global phenomenon, health and wellness tourism started to be sought not only by those who wanted to perform treatments, but also by those who wanted a more relaxed environment to obtain the greatest possible satisfaction during the experience. The Tourism Strategy 2027 (Ministério da Economia, 2017) also highlights the importance of this type of tourism in the Portuguese context and defines as priorities health and wellness tourism projects associated with the therapeutic properties of the sea, as well as actions to enhance tourism and promote lakes, inland waters, springs, and thermal waters.

Although there is an effort on the part of spas and organisations to try to change mentalities, there is still a large part of the population that associates spas with a hospital space and, subsequently, an aging population and unappealing facilities.

Like the main health and wellness destinations in Europe, 98% of spa users in Portugal are from the domestic market. Although still small, the external health and wellness market has been growing, with customers from countries like the UK, Germany, France, Russia, Belgium, Switzerland, and Spain, which is in line with the intentions of the National Strategy Plan for Tourism (Ministério da Economia e da Inovação, 2007), in which there is a greater preference for health and wellness tourism by Mediterranean countries and Northern European markets, especially Germany due to its strong consumption of classical thermal tourism. Regarding the countries that have a similar offer to Portugal, and that can be considered competitors, Spain, Italy, Austria, France, Germany, and Switzerland stand out.

4.2 An Overview of Portuguese Thermalism

Thermal/mineral springs industry may the defined as one encompassing revenue-earning business establishments associated with the wellness, recreational, and therapeutic use of waters with special properties (Global Wellness Institute, 2021). The Global Wellness Institute (2021) estimates that there are currently more than 34 thousand of these establishments operating in 130 countries, which obtained revenues of $39.1 billion in 2017 and $64 billion in 2019, being among the fastest-growing wellness sectors in this period with annual revenue growth of 6.8%. The sector is heavily concentrated in Asia-Pacific and Europe, which concentrate 96% of revenues and 94% of this type of establishments. Many European countries have a long history of using thermal/mineral waters for curative and therapeutic purposes, and this is often subsidised by government insurance systems.

Portugal is no exception to this long European tradition. The practice of thermal tourism is not only associated with its therapeutical benefits. As Cunha (2001) refers "taking the waters" during the 18th and 19th centuries became a fashion but also a way to spend time and rest to the upper classes of Europe, and so thermal centers were the real worldly tourist centers of the time. The people's search for a certain natural water has been known for centuries, and often implied traveling to a certain geographical point to fulfil the desire to search for pain relief. It was from this practice that the first spas and support infrastructures began to emerge giving birth to thermalism as a social phenomenon (Amaral, 2010). The use of this types of establishments as a predominant motivation for travel incites temporary stays, converting many thermal users into tourists. The historical evolution of thermalism is seen as a huge sequence of ups and downs. In the 70's, about 60 thousand people went to the national thermal spas, corresponding to 0.7% of the Portuguese population (Ramos, 2005), which is a low amount when compared to other European countries. That can be explained by the longer duration of the spa season in other countries, as well as the fact that treatments are more competitively priced. In addition, the geographical distribution of Portuguese spas is a factor that has always worked against thermalism in Portugal, since tourists tend to seek the coast and the south, while the spas are mostly located in the North and Center, and therefore the spas ended up abandoned and in need of the resurgence that has taken place in recent years.

The Decree-Law nº 142/2004 from 11 June introduced a new legal framework that would allow a dynamisation of thermal spas in Portugal. This decree establishes the rules for licensing thermal establishments, for the organisation, operation, and supervision of the sector, including the potentialities that wellness and leisure may bring to the revitalisation of the sector. There is a clear objective of giving thermal establishments the power to develop a diversified offer enhancing health, well-being, and tourism in a more effective way, overcoming the previous legislation (Decree Law No. 15 401 of April 20, 1928) that was clearly outdated and inadequate to the current reality of the tourism and wellness product (Gonçalves & Guerra, 2019).

Depending on its main purpose, two distinct segments can be identified: classic thermalism and wellness thermalism. In classic thermalism, after a detailed medical consultation, people are guided to treatments with therapeutic purposes and specific associated pathologies. Usually, as these are prescription treatments, they tend to be longer, to cure the associated pathologies. In wellness spas, for recreational and tourist purposes, the focus is on providing mental and physical balance to the person who uses them. Some of the services available to this type of thermal user include massages, saunas, and relaxation activities, among others. These programs are of short duration, and do not require a doctor's prescription. These two segments constitute two market niches with different characteristics and needs. The first is a mature niche market that needs intervention with a view to its rejuvenation and, the second, is an emerging niche market that needs intervention with a view to its consolidation (Gonçalves & Guerra, 2019).

4.2.1 Supply and Demand

Portugal is rich in natural mineral waters, with about 400 classified hydrothermal springs and more than 40 thermal spas, the majority concentrated in the North and Center regions, thus having great touristic potential, especially in the health and well-being segments. The link between thermal spas and tourism becomes even more evident through the inclusion of many spas in thematic routes of great touristic value (ATP, 2022).

In 2019 there were 47 thermal spas operating in Portugal, concentrated mainly in the North and Center zones. In 2019, thermal treatments restarted to be reimbursed by the National Healthcare System, after this funding had been suspended in 2011, with a maximum limit of 95 euros per user. According to the joint decree of the Ministries of Health and the Secretary of State for Tourism, the thermal treatments that are prescribed in primary health care of the SNS are covered by this support.

Based on data from the Direção Geral de Energia e Geologia (DGEG, 2021) the number of thermal spa registrations, despite having some oscillations, rose considerably from 2011 to 2019, reaching its highest point in 2016 at 138 981 visitors. Regarding the revenues, except for 2014 and obviously 2020, the revenues have constantly remained between 13 and 15 million euros, with its highest value in 2019, with 33 thousand euros more than in 2011 (Table 1).

Table 1. Number of Enrollments in Thermal Spas (2011-2020)

Year	No. of Enrollments	Var. (%)	Euros (€)	Var. (%)
2011	100 642	37,0	15 301 168	-17,3
2012	96 927	-3,7	13 556 949	-11,4
2013	90 621	-6,5	13 009 962	-4,0
2014	105 739	16,7	11 632 368	-10,6
2015	110 168	4,2	13 258 688	14,0
2016	138 981	26,2	15 257 137	15,1
2017	117 090	-15,8	13 350 685	-12,5
2018	133 762	14,2	13 184 238	-1,2
2019	135 259	1,1	15 334 995	16,3
2020	45 722	-66,2	5 378 985	-64,9

Source: Own elaboration, based on DGEG data (2021)

Regarding the distribution of the number of registered thermal spa users by classical and wellness thermalism (Table 2), except for 2011 and 2013, wellness thermalism figures were always higher. In the whole decade, wellness thermal tourism received 210 thousand more visitors than classical thermal tourism, which reinforces the growing demand for leisure and wellness purposes. This is supported by the variation in the number of registrations of each of the segments over the decade, with the classical thermal spas suffering a drop of about 10 thousand visitors from 2011-2019. On the other hand, wellness thermalism increased considerably throughout the decade, with the year 2018 standing out with more than 90 thousand registrations. This increase in the decade was so noticeable that in 2019 there were more than double the visitors of 2011 and even in a pandemic year, 2020, figures were close to the ones registered in 2011.

Table 2. Number of Enrollments in the Different Segments and Total Revenues (2011-2020)

	Classic thermalism		Wellness thermalism		Total		Total income	
Year	No. enrollments	Variation	No. enrollments	Variation	No. enrollments	Variation	Revenues	Variation
2011	57 603		43 039		100 642		15 301 168	
2012	48 337	-9 266	48 590	5 551	96 927	-3 715	13 556 949	-1 744 219
2013	46 603	-1 734	44 018	-4 572	90 621	-6 306	13 009 962	-546 987
2014	41 486	-5 117	64 253	20 235	105 739	15 118	11 632 368	-1 377 594
2015	42 314	828	67 854	3 601	110 168	4 429	13 258 688	1 626 320
2016	50 814	8 500	88 167	20 313	138 981	28 813	15 257 137	1 998 449
2017	41 069	-9 745	76 021	-12 146	117 090	-21 891	13 350 685	-1 906 452
2018	43 209	2 140	90 553	14 532	133 762	16 672	13 184 238	-166 447
2019	47 509	4 300	87 750	-2 803	135 259	1 497	15 334 995	2 150 757
2020	13 372	-34 137	32 350	-55 400	45 722	-89 537	5 378 985	-9 956 010

Source: Own elaboration, based on DGEG data (2021)

Most users (around 60% in both segments) chose establishments located in the Centre, followed by the North which received around 30% (TravelBI, 2021). As for the demand per quarter, in 2019, for these two segments (classic and wellness thermal spas), the users chose to use these services mostly in the 3rd quarter (months of July, August and September), with values around 17 thousand users of classic thermal spas and 30 thousand of wellness thermal spas. The first quarter showed the lowest demand with 3,595 customers in the classical spa and 10,730 in the wellness spa (TravelBI, 2021). On an economic level, it is also important to understand the turnover and the contributions that the thermal sector has to the national economy. The classical thermal spa registered a turnover of 11 532 100 euros, while the wellness spa had a turnover of 2 227 300 euros, a large but not surprising difference, considering the prices charged in classical thermal spa services, as well as the demand from the older population, in a country characterised as aging. As for the average stay for wellness spa clients, it is noticeable that most users only stay one day. As a rule, this type of segment has short programs, which do not need to be continuous since the clients enjoy a single program, but repeat this scenario several times a year or over the years, unlike what happens in classical thermalism (TravelBI, 2021).

There is a higher preference for wellness thermal services up to the 55-64 age group. From 65 on, there is a greater demand for classic spa services (TravelBI, 2021), which we can assume are people looking for a way to ease possible pains and the effects of certain diseases. The 5 main foreign markets of this sector are Spain, France, United Kingdom, Switzerland and the United States, which accounted for 12,4% of the overall demand (TravelBI, 2021).

4.2.2 User's Profile

There is a significant number of studies addressing the motivations of health and wellness tourists worldwide. However, what concerns to the profile of thermal spas users research is still scarce. In the last years a few studies concerning the users of these establishments in the Portuguese context stand out.

A research from Rodrigues, Brochado and Troilo (2020) focused on the factors affecting tourism satisfaction and dissatisfaction in thermal and mineral spas in Portugal. Aiming at identifying thermal and mineral spas attractiveness based on tourists' web reviews (2015-2019) in a post experience phase, the research identified five key categories of attributes driving customer satisfaction in the particular context of thermal and mineral spas, those being (i) thermal and spa attractiveness (which includes thermal spas, location, and mineral water pools, (ii) the importance of the facilities (in particular, private accommodation) and (iii) services provided by the staff.

The study from Brandão et al. (2021) analysed 201 thermal tourists in the thermal facilities of Chaves and São Pedro do Sul. 60% of users in these two thermal facilities were women and an average age of 55 years old. Concerning academic qualifications, the most significant group (30%) completed primary school, followed by 25% holding a higher education degree and 22.4% with high school. Nearly half were retired and around 42% employed. 95% of the respondents live in Portugal. The results highlight that most respondents practiced thermal tourism due to leisure and relaxation benefits, such as escaping daily stress, spending time with family, and being pampered. Relaxation is the most valued motivation, followed by the search for psychological and physical well-being.

Silvério, Fernandes, & Alves (2021), through a sample of 107 questionnaires to the thermal spa users of Chaves, found that 70% of the respondents were women and the average age 58 years old. 44% hold a higher education degree and most were inactive, mainly retired. 80% live in Portugal and from these 72% come from the Northern region, where the Termas de Chaves facilities are located.

Also from data obtained from 220 users of Chaves Thermal facilities during the 2021 thermal season, Vaz et al. (2022) were able to find the *persona* that uses these facilities, that being a Portuguese woman with an average age of 69 years old. She is married, attended just a basic level of education and lives nearby the thermal establishment. She lives with her husband and is retired, with a net monthly income 666-1300 euros. The user is familiar with the services and does not frequent other thermal spas. Therapeutic thermalism and medical advice is the primary motivation to attend the thermal spa. Users stay for an average of 14 days, mainly in the summer and autumn season and spend between 501-1000 euros. The most important attributes are the medicinal quality of the water and the quality of the facilities.

5. Conclusion

Health and wellness tourism is a growing trend worldwide, particularly motivated by a change in the health paradigm, which has clearly evolved from a narrow perspective based on physical health and well-being to a broad vision of holistic health. Thermal spa tourism, as a segment of health and wellness tourism that uses mineral spring water as the main resource, is a growing sector that follows the global trend towards a search for products that increase quality of life. Despite the steady growth in previous years, wellness tourism and thermal/mineral springs were the economy sectors that were most severely hit by COVID-19, as they require a physical presence and/or full immersion for the actual experience. However, predictions point to a fast recovery, as pandemic has reframed wellness as an essential societal value. This new wellness paradigm is the basis for new opportunities for health and wellness tourism, which has now to adapt to this new demand and develop customer-oriented products and services.

In Portugal, health and wellness tourism is considered a strategic product to the development of the sector and the use of thermal spas is a centuries' old tradition. The demand trend that has been seen in recent years shows a range of new opportunities for the thermal spas, as a segment of health and wellness tourism, following the worldwide trend. However, studies on the profile, motivations and needs od thermal spa users in Portugal are still scarce. Recent research on the field shows that there is a higher preference for wellness thermal services up to the 55-64 age group, and a greater demand for classic thermal spa services from 65 on, which confirms previous research on the growing demand for wellness services by younger age segments. It also found that most users of thermal spa facilities live nearby the thermal facilities, with foreign markets accounting for just over 10%. This may indicate a need to offer new products and services that appeal to international tourists to take advantage of the full potential of thermal facilities and guarantee their sustainable development in the future.

In Portugal, thermal spas are mostly located in the North and Centre regions and may be an important factor of local development. With an historical evolution marked by ups and downs, the new wellness paradigm and the new market niches and consumers' demands may create a window of opportunity to their sustainable development.

As with all studies, also this research has found some limitations, the main one concerning the available data. As referred in the literature review, there is a paucity of studies concerning thermal spa users. The same verifies in the Portuguese context, which may undoubtedly limit the capacity of the sector to adapt to new market demands.

A recommended line of research would be to focus on the profile of international thermal tourists, to identify the profile, the needs and demands from this segment. Another line of research would be to develop a national survey on thermal spas in Portugal to overcome the paucity and fragmentation of available data on the sector.

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