

Demand trends in european thermalism

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Objectives | Thermalism is a popular form of therapy that involves the use of the healing properties of mineral waters for health and wellness purposes. In Europe, thermalism has a long history and is widely practised in many countries across the continent (Rawlinson & Heap, 2017). 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 the wellness tourism industry is the conceptual development related to the key term wellness. In recent years, classical thermalism, focused essentially on the 'cure' dimension, has been replaced by modern thermalism, which is particularly based on the 'wellness' dimension, and the offer is more focused on preventive therapeutic motivations, combined with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 therapeutic assumptions but also a holistic perspective, which simultaneously includes the assumptions of health and wellness. This research aims to analyze the main European thermal destinations to trace the demand profile.

Methodology | This work was based on a qualitative research approach, selecting the semi-structured interview as the instrument for collecting empirical data. A total of 10 interviews were conducted online (by Zoom platform), during the first semester of 2022. The target of this research included stakeholders of the thermal tourism sector, located in the various countries under study: Portugal, Spain, Italy, Hungary, and France.

Main results and contributions | In what concern the identification of a profile of demand in Europe, it was notable that we received mostly unanimous responses, with a profile still popularly linked to pensioners or the elderly. Even so, some still consider the profile to be between the ages of 40 and 55, others consider there to be greater demand from an age group above 55, and some cases indicate that there is a greater demand from couples, which can range from 30 to 50 years old. 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 are looking for solutions to reduce the daily

stress they experience and harmony between their body and mind (Tzedopoulos et al., 2018; Branco 2019; Smith et al., 2020; Brandão et al., 2021). In terms of length of stay, it was possible to associate shorter stays with younger people (4 to 5 days) and longer stays (2 to 3 weeks) with senior citizens. This trend confirms the results of previous studies for Portugal and Hungary (Quintela et al., 2023). Given these results, it is possible to conclude that there are no significant differences between the countries analyzed concerning the demand trends.

Limitations | The main limitations highlighted in the present study relate to the scarce studies area of thermalism in terms of an international approach, and the geographical dimension of the study, which could be even larger, considering the extensive number of thermal destinations in Europe. Also, the reduced size of the sample gives the study an exploratory character, not allowing the generalization of the results. However, these limitations can be overcome in the future through replication of the study in other countries with the same characteristics.

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 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.

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