6. Social thermalism and relaunch projects in the name of wellness tourism

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INTRODUCTION

Thermal tourism is an industry that has particular characteristics, halfway between tourism and health activity; it represents the most important and typical example of tourism for treatment, and assumes the existence of mineral waters and the use of means and human energies that can be adapted for the purposes of treatment. Italy boasts an ancient hydrotherapy tradition which has gained countless admirers and is even seen as an alternative to modern medicine, above all thanks to new needs related to personal care.

In trying to give a definition of the spa industry, we could say, using the words of the scholar Emilio Becheri (Becheri & Quirino 2012), that 'thermal activity is something broader than tourism related to treatments, just as thermal tourism is something broader and different from the movement of curandi'. In fact, thermalism cannot be separated from the concept of tourism, partly because of new trends that consider health more as an aspect of beauty than as a state to be cured. If we admit that thermal tourism is to be considered to address one of the basic motivations of tourism – care, culture, and entertainment – then thermalism is to be placed precisely in the bracket of tourism.

According to data from ENIT, the Italian National Tourist Board, there are 188 organized spa resorts in the country, distributed evenly throughout all regions of the peninsula with the exception of Molise.[1] Over the years, to better define and qualify the industry, several laws and decrees have shared the responsibilities of the industry between state, regions, and municipalities.[2] Articles 117 and 118 of the Constitution specify that the legislative and administrative powers for mineral and thermal waters be entrusted to the regions.

In 1957, by a Ministerial Decree of 20 April, the thermal baths were transferred as patrimonial corporations to the Ministry of State Participations; subsequently EAGAT, the Autonomous Body for the Management of Thermal Activities, was created, to which they were transferred by Law no. 649 in 1960.

EAGAT was abolished by Law no. 641 in 197. This law transferred EAGAT's shareholdings to EFIM, the Board for the Participation and Financing of Manufacturing Industries [Ente per la partecipazione ed il Finanziamento delle Industrie Manifatturiere]. EFIM ended up managing the 13 public spa companies until 1992. In fact, in that year, Legislative Decree no. 487 established that the former EAGAT corporations were subject to the jurisdiction of the Ministry of Industry, which was entrusted with the task of preparing a programme for reorganization of the spa industry.[3]

Finally, between 1994 and 1995, the shares and responsibility of the former EAGAT were transferred to the Ministry of the Treasury, which in turn gave a mandate to IRI to reorganize the industry. The two Bassanini Laws[4] provided for the privatization and regionalization of the spas that were owned by EAGAT and which at the time of their enactment, as mentioned, were managed by IRI. Therefore, the Bassanini Laws transferred the shares, assets, personnel and brands of the spa companies previously managed by EAGAT to the relative municipalities and regions. Generally, the use of facilities has been reserved for the wealthy; in addition to their healing function, a stay at a spa was seen as a moment of social and intellectual entertainment. Spas have always combined health and entertainment aspects, though over time this combination has obviously undergone changes. In this regard, the following division into periods could be used to identify the most interesting aspects of this industry and see how it was transformed following economic and social changes in the national system.

In the first phase, approximately from the end of the nineteenth century up to the 1930s, the thermal ‘product’ has a strong healing feature, primarily due to competition from seaside resorts. This sought to exploit factors that differentiated a stay at the spa from a stay at the beach, or the possibility to heal oneself, to get better, to regenerate one’s own body. The turning point came in the 1930s with the development of Italy’s National Health Service, through which spa treatments were guaranteed to an increasing number of people. Thus, spa tourism was transformed from an elite phenomenon into a mass phenomenon, requiring more vivid action that only the government could deal with.

This ‘revolution’ in the industry took place between 1930 and 1970. Spas were increasingly characterized as a place of prevention and global care, dedicated to therapies for the wellbeing of the body, outer and inner, through the use of all possible techniques, from traditional medicine to natural therapies, and even Oriental therapies.

The 1970s and 1980s were a transitional period during which the subsidies granted to people receiving spa treatments for health needs expanded due to a lack of control over and integrity of the process. Consequently, many had access not because of any need, but simply to boost their annual vacation time. The period of time taken for thermal treatments often preceded or followed (in continuity) that of the established vacation. This malpractice lasted until the beginning of the 1990s, when the spa system found itself no longer able to use the resources of the National Health System. In addition to having to stand on its own two feet to recover its position, the spa industry necessarily had to commit to relaunching its image, which had degenerated over time due to poor service quality and a lack of valid scientific support: in fact, research in this field dated back to the 1960s. The combination of all these components led to a lack of interest and confidence in the treatments and the spa industry, which resulted in a considerable decline in services and a crisis in the industry.

In order to restore credibility in the spa industry, in the 1990s the Ministry of Health and the Spa Association (Federterme, Unionterme and Assoterme) promoted a medical health project called NAIADE. The main purpose of this project, which began in 1996 and lasted three years, was to scientifically study the effectiveness of treatments given in Italian spa facilities (in all, 297 establishments were involved). The NAIADE project was intended to be an instrument to strengthen the spa industry and guarantee new impulses in an industry, such as health as well as physical and aesthetic wellbeing, which had the potential for considerable improvement.

In 1996, in order to keep the conditions of the spa industry under control, the National Observatory on Thermalism and the Regional Observatories were created, with the task of also designing a global and national product marketing strategy, going beyond the previous territorial marketing strategies, centred on the role of individual resorts and individual treatment systems. A study carried out by the Federterme Research Center in 1995 revealed that among all European countries, Italy recognized the shortest cycle of care – 12 days; that is, half the days of care provided by the National Health Service in France, Russia, Belgium, Switzerland, Hungary and Slovakia. Even the share paid by the Public Health Service, equal to 50 per cent, was not among the highest in Europe.

Spa activity also constitutes a complex economic phenomenon due to aspects linked to the original resource, in terms of both the real estate granted and the business activities developed on these two components. After the downsizing produced by the crisis, the Italian spa industry stabilized at more than 950 direct employees, more than 1,200 contractors and paramedics, 3,900 seasonal workers and about 1,500 random workers (Federterme, 1996). Altogether, the entire industry employs about 11,000 people, and is akin to a large company. The effect in the national economy is relatively small, but it increases if, in addition to the typical spa component, we consider the work units activated in the hospitality industry, in the entertainment industry and in other services. Thus, taking into account both direct and induced, spa employment can be estimated at around 30,000 units.

Use of thermal treatments increases in line with age. It is not widely practised by people up to the age of 40 but then becomes quite common between the ages of 40 and 60 and is most widely used among the over-60s, half of whom report using such treatments. Enormous development of this industry is possible: while only 17 per cent of the tourists interviewed practice health activities, 74 per cent of the subjects interviewed stated they are willing to dedicate a period of time during the year to care for their own health, while 26 per cent of the population stated they are not willing to spend time on health maintenance treatments instead of other activities. Therefore, there is a market potential, an unsatisfied demand, equal to 57 per cent – a very high percentage that suggests excellent development perspectives (Consorzio Toscana Termale, 1997).

When considering the thermal industry within the entire Italian tourism industry, we can see that thermalism has marginal importance. Arrivals in spa towns represent about 3.5 per cent of arrivals in national tourist destinations, while presences are around 5 per cent of the Italian total (ONIT, 1997).

The average stay (presences divided by the number of arrivals) of spa tourists is longer than the average stay seen in domestic tourism. In 1990, for example, while tourists stayed an average of four days, spa tourists stayed between six and seven days. In 2000, the average stay in general remained at about four days, not much different from the thermal stay, that went down to five days.

Over the years, thermal tourism has seen a trend very different from that of the Italian tourism industry. In particular, while thermal tourism was in its period of crisis, domestic tourism was increasingly affirming itself – so much so that experts talked about a real 'boom' of the same, with results that far exceeded the most optimistic forecasts. The situation with spas was stationary between 1986 and 1991; in this period the number of spa treatments remained more or less unchanged. Subsequently, as a result of restrictive measures by the National Health Service, since 1992 there has been a drop in the number of treatments carried out – a decrease of about 40 per cent was seen between 1991 and 1995. The number of people receiving treatments in the period 1991–5 fell drastically, from 1.7 to 1.1 million, a decrease of approximately 35 per cent (Unioncamere, 1996). During the same period the decline in the number of spa services was accompanied by a sharp drop in the total turnover directly generated by the spa, which fell from 388 to 291 billion lire, a drop of 25 per cent, while the turnover from the National Health Service for spa treatments fell by 45 per cent, from 229 to 124 billion lire (Ibid).

The large thermal spas reported a lower decrease than the smaller ones, a phenomenon which can be attributed to the tourist attractions offered by the larger resorts, which can offer various types of tourist a vacation made up of more than just thermal treatments. In 1996 there was a reversal of the trend in spa services: with respect to the previous year, spa services increased by 3 per cent and turnover by 8 per cent, returning to more than 300 billion lire per year, a figure not reached since 1992 (Barucci et al., 1997–8). This increase was mainly due to the devaluation of the lira, still the national currency at that time; the arrival of the euro attracted many foreign tourists due to a more favourable national currency ratio for the latter.

Today, in order to relaunch and maintain a constant contribution of Italian thermalism to the tourism industry, the single thermal structures should create a unitary design for the entire industry. It is necessary that the various structures scattered throughout Italy give up their localist interests and create a common project. For their part, public and private spa companies must continue work to restore their image. To this end, managers must always be ready to seek to successfully interpret a constantly evolving demand.

Spa facilities should take care of the environmental context in which they are established in order to attract demand in terms of nature and art, improve therapeutic equipment and have well-qualified staff. Therefore, on the one hand, traditional healing activities should be enhanced, and on the other hand, the opportunity should be seized to diversify the offer towards innovative thermal models, such as health centres and thermal pools; all this will make them more appealing and attract new groups of customers with different possibilities of stay duration and service quality.

One of the most immediate economic effects of the crisis associated with COVID-19 was the interruption of tourist flows. The first effects emerged in February 2020, as the epidemic spread, but at the beginning of March activity came to a standstill with the generalized measures of social distancing (ISTAT, 2020). According to the Law Decrees on the State of Emergency, non-hotel accommodation facilities in Italy were considered non-essential activities and, with a few exceptions, closed. Hotel establishments could formally continue to operate, but in the vast majority of cases suspended all activities. Other industries affected by the demand triggered by tourists have also seen significant impact: these include catering, various types of transport and, to a lesser extent, commerce.

Many experts in the industry have said it will take some time to calculate the economic damage caused and to see a full recovery of the industry. Meanwhile, the first forecasts on the losses caused by the crisis have been made. According to Istat, in the quarter March–May 2020 there would have been more or less 81 million presences (which corresponds to 18.5 per cent of the annual total), which would have earned 9.4 billion euros from expenditure of foreign tourists. This data is to be considered as the first loss in the tourism industry, to be added to future data, but in any case it illustrates the gravity of the economic crisis. A more comprehensive description of the crisis situation may consider figures from the Bank of Italy: in March there was a year-on-year drop of about 80 per cent in revenue for travel in Italy and a drop of 70 per cent in foreign travel by Italians.[5]

GEO-ECONOMIC CHARACTERISTICS OF ITALIAN THERMAL DESTINATIONS

As already stated, spas have always been a valuable resource that gives uniqueness to a territory. Thermal waters derive from the different geo-physical peculiarities of the territory and, therefore, have different healing properties. In addition, many are located in particularly significant and culturally interesting areas with attractive natural landscapes and geographic factors; in other words, overall characteristics make these areas particularly attractive for tourism (Canizzaro, 2014; Dai Prà, 2013). However, in Italy as in other parts of the world, these destinations do not attract the same quantity of tourist flows due to the structural size of the areas and the different attractions and services offered. As shown in Figure 6.1, in Italy there are many thermal spas, but not all locations are able to attract tourists in the same manner. Some places, even if possessing beneficial waters, are nevertheless unable to attract tourists, as can be seen in the data given below (although the information is dated, the highlighted trend continues) (De Iulio, 2019).

According to Federterme's data, in 2014 Italian companies classified as spa companies numbered about 380, offering about 28,000 beds, almost 50 per cent of which are located in Northern Italy; in particular, the regions with the largest number of spa companies are Veneto, Campania and Tuscany (Monte dei Paschi di Siena, 2014).

Source: Faroldi et al. 2018.

Figure 6.1 Distribution of thermal establishments in Italy

This concentration derives precisely from the different services and activities that spa companies have provided over the years, so much so that in many tourism products the spa itself becomes a frame, the main attraction not being linked exclusively to spa treatments, but to a series of services related to wellness. These services linked to the person and to wellness allow for a much longer average stay than simple treatments would entail. Over time, therefore, the relationship between thermal waters and wellness has grown and has increasingly linked health therapies with the more general theme of wellness, allowing water to play a multifunctional role, thus characterizing various tourism products. This new consideration of spa treatments tied to the more general theme of wellness can also be seen at the international level, where in 2017 travel turnover for wellness tourism was, in absolute terms, greater than that for spas, strictly understood (see Table 6.1). The geographic distribution of these positive results, however, is not evenly distributed: Europe and Asia hold the highest level of turnover for strictly understood spa treatments compared to all other regions, while North America and Europe are the areas with higher shares of wellness tourism turnover. The other regions trail the rankings by a wide margin – elaborated by the Global Revenue Report, 2017 – and sub-Saharan Africa unfortunately is at the tail end in both rankings (Global Wellness Institute [GWI], 2018).

While in absolute terms wellness tourism has the highest share of turnover compared to spa tourism (see Table 6.1), in relative terms – that is, in terms of the turnover of spas compared to the quantity of spas in that region, or rather continent,

Table 6.1 Turnover in absolute terms expressed in billions of dollars, by geographic breakdown and different modes of thermal water use, 2017

	Thermal establishment	Spas	Wellness tourism
Europe	21.7	33.3	210.6
Asia Pacific	31.6	26.5	136.7
Middle East and North Africa	0.4	2.8	10.7
Sub-Saharan Africa	0.08	1.6	4.8
North America	0.7	22.9	241
Latin America and Caribbean	1.6	6.6	34.86

Source: Author's elaboration from Global Wellness Institute, 2018.

Table 6.2 Main balance sheet items of capital companies in the wellness industry in Italy (euros)

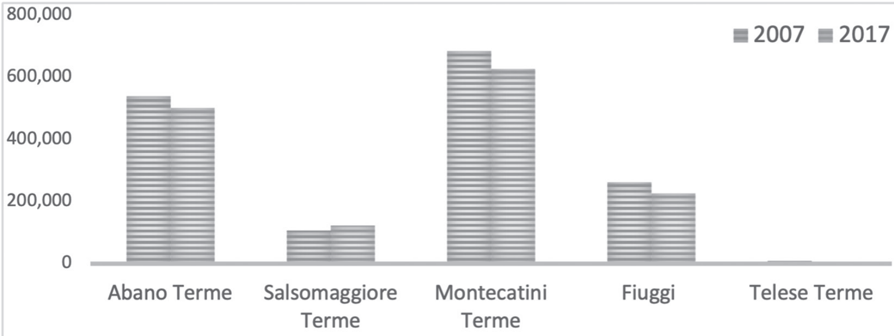
	2013		2015	
	Production value	Added value	Production value	Added value
Segment average	322.306	115.934	504.589	166.259
Segment total	1.338.538.319	481.474.841	2.276.704.252	750.162.054

Source: Author's elaboration from Infocamere data, 2017.

and in terms of the turnover of wellness tourism relative to the number of trips over a year for that purpose – strict spa tourism seems to be more advantageous than wellness tourism in terms of turnover, since there is less wellness tourism than actual spa tourism.

While spa tourism is highly profitable at the European level, the same trend is not currently seen in Italy. As Table 6.2 shows, total added value was only €166,000 in 2015; though this has increased since 2013, it cannot be considered to be a high-level result (Infocamere, 2017). This data should be related to tourism movement in the spa system in Italy. Figure 6.2 shows how tourist arrivals are not well distributed in Italy and this concentration supports the hypothesis that the added value of spa companies in 2015 comes from only some establishments, not all. The difference in distribution also affects the 'wellness' market, which had been steadily increasing but then experienced a decline in recent years (-3.8 per cent y/y compared to 2012: Infocamere, 2017). This obviously means that wellness tourism, which includes many services aside from thermal ones, is 'patchy' in Italy. The new model of wellness tourism is, indeed, one of the reasons why tourists choose spa destinations.

According to the MPS Report (Monte dei Paschi di Siena, 2014), the main reasons for staying in spa destinations are cited as wellness, beauty farm and fitness (36.8 per cent), in addition to being seen as an ideal place for rest (41.1 per cent).
Indeed, as stated, a focus on wellness has increased the attractiveness of spa destinations and, according to the latest available data, the industry (mainly accommodation and recreational activities) can be quantified as having 4.5 billion euros of turnover



Source: Author's elaboration from Incipit Consulting 2018, ISTAT 2017, MPS 2014 and Associazione Provinciale Albergatori Montecatini 2018.

Figure 6.2 Tourist arrivals in some Italian spa towns 2007–17

and 73 thousand jobs (Becheri & Morvillo, 2019). Moreover, wellness tourism has also affected the average stay, albeit reduced in comparison to the 1990s, when the average stay was ten days. The attraction of high-quality hospitality in locations consisting mainly of multifunctional hotel facilities with indoor and outdoor spaces for wellness activities leads to an average stay of four days (Becheri & Morvillo, 2019).

Thermalism in Italy is unable to develop uniformly, despite constant attempts to improve by adapting to international standards, complying with health procedures and pursuing customer loyalty. The regions with the highest number of spa resorts in Italy are Veneto (with 85 spas) and Tuscany, followed by Trentino Alto Adige, Emilia Romagna and Campania, which account for more than 80 per cent of the total (Becheri & Morvillo, 2019). The logic of the market is currently prevalent – compared to the welfare logic of the 1980s – and it has certainly introduced competitiveness into the market; only some resorts have been able to seize the opportunities presented and become leaders in the industry (ISTAT, 2017).

This gap grew during the pandemic as some spas and solid destinations were able to activate sanitizing systems before others, making spas and destinations more likely to be COVID-19 free. Others took longer to adapt, compelling domestic tourism demand – due to COVID-19 only Italians could stay overnight at such venues – to concentrate on only a few destinations. It should also be noted that the spa resorts in Italy are characterized by a contained demographic dimension that represents on the one hand great value for the co-production and participatory production of spa and wellness services, and on the other hand great difficulty given slow reactions to the introduction of innovation, derived precisely from the isolated social environment.

In addition, tourism demand has changed greatly with the pandemic, which provided time to make greater use of social networks and make use of some tourism products in person, while also leading to a search for spaces and pleasant places to activate smartworking where one can relax and not be hyperconnected, allowing genuine contact with the local reality throughout the year, thus evading any form of seasonal adjustment.

SWOT ANALYSIS OF THERMAL DESTINATION

In Italy thermal destinations are not characterized by a homogeneous model, since the use of treatments depends on the type of water, which has diversified properties. The use of water for the treatment of multiple diseases should be seen not as a limitation, but as an opportunity to decline the tourist offer aimed at wellness and health in its different forms (Smith & Puczko, 2016). It is known, in fact, that many spas worldwide have created hospitality centres offering a variety of services related to different types of tourism: health, sports, meditation, wellness, outdoor and so on, fulfilling what the famous Latin motto says: *mens sana in corpore sano*.

In order to be able to offer tourists high-quality services to support physical and mental wellbeing, we need to create a supply chain in the destinations with high added value: the spa experience becomes part of the tourism product, composed of a series of tertiary activities that form the value chain at a local level. In Italy, this supply chain often fails to form a unitary and constantly evolving system as the international and national market requires. This difficulty has very deep origins that unfortunately continue to persist and can be traced back to the persistent gap in development between urbanized and inland areas where most spa destinations are located. This gap has also distanced thermal destinations from an updated and strategic vision of thermal tourism, so much so that local operators suffer as a result of training that very often – not always – is unadapted to the evolution of the system and new technologies. The current model of spa tourism related to wellness and health requires special skills and competencies that are often unavailable locally, thus losing some of the added value that could be gained.

This deficiency is present in some places in Southern Italy, and especially in those far away from large centres of higher learning, both geographically and in terms of mobility and accessibility. The problems outlined emerged in data analysis of the preceding paragraphs. Therefore, a more comprehensive picture is required to understand the real state of spas in Italy. In fact, the SWOT analysis developed here (see Table 6.3) aims to identify the many strong points, weaknesses, threats and opportunities that can differentiate spa destinations today.

If some of the weaknesses have already emerged, strong points are needed to balance and give an overall analysis for improvement and development. The first strong point is precisely the uniqueness of the water properties that make a thermal context a privileged territory that very often contains many unique features, thanks to the natural and cultural context (genius loci) in which it is located (Rocca, 2008; Romei, 2016). The spa landscape is certainly a great strength, especially in times of COVID-19, where the presence of open-air attractions is one of the reasons for choosing a vacation spot. This possible use, together with the many tourist activities available at spa destinations, have made the spa site a frame site (Giortart, 2008),

Table 6.3 *SWOT analysis of the thermal destination*

Strengths	**Weakness**
• Unique properties of the waters and their healing properties • Wellness and health tourism (but still much to be improved) • Demographic, environmental and historical–cultural size of thermal destinations and its territorial identity • Diversified and non-conflicting tourism products • Quality of the hospitality supply • Loyalty • Genius loci, landscape and natural environment	• Gap between Northern and Southern Italy • Missing of international promotion and branding of the Terme Italia destination • Welfare of thermal care • Fragmentation and small size of hospitality enterprises • Research and studies on thermal water • Health infrastructure – in Italian small towns have no major hospitals • Accessible and inclusive destinations (many spas are accessible but not destinations) • High-level training and life-long learning
Opportunities	**Threats**
• Integrated supply chain • Multidimensionality of tourism products (health, spa and wellness tourism) • Multiplicity of attractions and multi-purpose tourist areas • Dissemination of quality hospitality in the destination • Proximity tourism for smartworking and stayvacation • Open-air spaces for different types of tourism product	• Marginality of thermal destinations (inner areas) • Digitisation of booking processes for both package tours and treatments • Sanitation, health care and COVID-19-free across the whole destination • Competitiveness on the international and national market • Local community between isolation and demonstration effect • Marketing and communication – brand

Source: Author.

which can be on the one hand a great lever of attraction but on the other hand a weakness by attracting only a certain type of clientele and not others. To overcome this difficulty, it is certainly necessary to put pressure on communication to highlight all the possible tourist activities and services offered by the destination.

Today, the communication and branding of spas in Italy are unfortunately points of weakness, being very fragmented and diverse due to the large gap that persists among destinations. Moreover, a further element of weakness is the presentation of spa destinations to the international market in a regional and, therefore, fragmented manner. Specific branding of Italian spas would help guide vacation choice. Disorganized communication leads to a reduction in market share and therefore succeeds in monitoring only the national level, thanks to the loyalty of customers deriving from the National Health System authorizations. Obviously, loyalty in itself cannot be a weakness point, but it does become one when it means preserving a thermal and tourist offer for the same clientele: the elderly. Italian spa tourism has had this characterization for many years, due also to the fragmentary nature of hospitality, mostly made up of small family-run hotels with specifically targeted investments, and the difficulty of connecting the various tourism products of the territory, despite the small size of many resorts.

Moreover, over time the latter have developed a great strength, which lies in the participation of the community and the settling of traditions and cultural heritage. What is more, this way of life can become a weakness point if, as happened in many destinations, it causes a massive migration of young people with a consequent reduction in the demographic size of municipalities, reducing investment in both public and private infrastructure (especially larger infrastructure) and in innovation (such as that related to hospitals or mobility). This infrastructural obsolescence, especially in this historical period, is a limitation that cannot be ignored and the presence of medical clinics and health defence units in such locations is often insufficient to ensure the sort of quality of care required in, for example, the case of COVID-19. The health aspect is surely a lever and an opportunity that should be used to welcome a wider category of tourists, so in order to encourage them to stay longer we must offer spa destinations not just as a healthy and sanitized destination, but as a place where one can enjoy wellness and health and have unforgettable experiences.

The geographic location of many of these destinations and their cultural and landscape heritage makes them multipolar and broad-spectrum (Giotart, 2008) thanks to their attractors and the open spaces currently in great demand for smartwork or staycations, if equipped with the necessary technologies. It is precisely this technological side that has led these destinations to suffer growth and development delay in previous years. Adaptation, both internally and internationally, seems to be required to make them competitive but despite this evidence, many localities still struggle to implement technologies and innovations.

The latter, then, would be beneficial not only for tourists but for the entire local community – for bookings, for internal mobility, and for social and economic inclusion (Bizzarri, 2019). And here is another very important issue, both for residents and for tourists who have all kinds of diversities and frailties (among the most common: sensory, dietary, religious, physical and mental) and seek to spend their vacation in spa areas, but who inevitably need to be welcomed in an atmosphere of serenity and community, satisfying their personal needs. Moreover, access is also a very important cultural factor, because by removing barriers new opportunities are opened both from an economic and a social and cultural standpoint (Bizzarri, 2019).

Opportunities to make spa destinations particularly suitable place for this type of clientele – in addition to the healing properties of water – arise from the possibility to enjoy the entire chain of wellness and health tourism linked to a healthy, comfortable and relaxing lifestyle. This tourism demand, together with all other types of tourism (health, spa, wellness, outdoor, sports), would activate a long integrated supply chain in the thermal destinations.

In fact, tourism services would form a value chain, since each activity gives a strategic added value to local development. It would be integrated because each tourist service – which in turn is made up of a series of businesses – can operate independently but then integrate if the tourist requires various services. Thus, for example, the thermal and outdoor parts can both provide two types of tourism offer, but they can also be integrated, enabling the tourist to stay for several days and enjoy both types of tourism. This is a way in which the Italian thermal model can still be greatly improved, as illustrated in the SWOT analysis presented here.

CONCLUSION

Thermal destinations constitute a widespread European heritage with a high potential for tourism and health, offering the possibility to generate territorial attraction, strengthen local economies and redesign the identity of contemporary landscapes. However, the Italian scenario presented here, from a long-term perspective, does not represent a competitive reality in the European panorama, due to unreliable data, misleading information and a lack of specialized centres. It is evident that COVID-19 was an asymmetric shock for all of tourism, but also for all individuals. The previous crises, although much less severe, also led to changes and the introduction of new business models. For example, the terrorist attacks in the US on 11 September 2001 led to a tightening of security measures which has been consolidated to this day.

The financial crisis of 2008 led to the origin of the sharing economy and new tourism operators using product and business models that did not previously exist (Uber, Airbnb, and so on). It is still too early to understand the magnitude and depth of the changes that will occur in the consumption and priorities of post-COVID-19 tourists, but there will certainly be a transformation. Search and demand for uncrowded, personalized destinations and tourist offers was already a trend prior to COVID-19, though still at an early stage. The emotional and psychological impacts of the pandemic sped up an increase in the will and desire for physical and mental wellbeing. As a consequence, tourist demand for less popular destinations and preserved natural places will increase and consolidate, but there will also be demand for higher-quality service, as well as the possibility for tourists to establish a strong human relation with the territory and local populations. In short, the demand for ‘slow tourism’ will expedite.

Certainly, in the post-COVID-19 era, the importance of the overall destination experience will increase. It will require flow management and ‘last mile’ issues; the appearance of brands that reassure and guarantee health or quality, for example; and contactless payment and cashless destinations. Certainly, it will be necessary to rethink tourist services and attractions, as well as tourist urbanism, so as to guarantee tourists a frictionless experience (Giuffré, 2020). As for wellbeing as a tourism trend, this does not refer only to wellness but to the concept of wellbeing at 360 degrees – that is, tourism to satisfy the senses, to feel good physically, psychologically, and emotionally.

The phase of relaunching implies a need for resilience, considering that local tourism systems will emerge exhausted and certainly weakened. The market is changing and will continue to change, as will demand. The communication strategy will have to be adapted, as highlighted above, with messages and images in line with demand, with its new expectations, motivations, interests and needs. In this perspective, territorial digital platforms can represent a valid form of support to sustain strategies for the promotion of these challenges because, unlike traditional websites, they can provide information on the territorial offer in an integrated way, feeding and supporting the activities of the local, economic, social, and cultural operators, enhancing territorial resources and skills through a setup system. The new technological models applied to territories can be an effective tool to create or consolidate territorial networks of local stakeholders and offer the possibility to be included in national and international networks (Lotito, 2018).

NOTES

1. The localities with mineral sources are in reality 450, but only part of them is provided with structures that guarantee their exploitation.
2. Law n. 281 of 1970; Presidential Decree n. 2 of 1972; Presidential Decree of 24.7.1976; Law n. 833 of 1978.
3. Law No. 202 of 1993.
4. Legge n. 59 del 1997 e Legge n.127 del 1997.
5. https://www.bancaditalia.it/pubblicazioni/indagine-turismo-internazionale/2020-indagine-turismointernazionale/statistiche_ITI_05062020.pdf

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