

destinations : wellbeing tourism

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IO2 – Wellbeing Tourism Destination Audit, Azores

January 2021

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Introduction

Wellbeing commands massive trends in tourism worldwide. Recent changes in modern societies have unveiled the desire for a more conscious way of living, granting increasingly more relevance to holistic wellbeing. Currently, travel is not only faced as a means of escaping unfulfilling jobs and work, but it is much more a way of extending a healthy lifestyle and a means to rebalance life, enhance health, reduce stress and find a renewed purpose and motivation. In the wake of the Experience Economy, the stimulation and catering of the body, mind and soul bring a wide array of opportunities to providing incredible experiences, sensations and mindful practices, which bring a whole new immersive reality to travel. The Covid-19 pandemic has brought to light the importance of such experiences and wellbeing in general. It seems that travellers will be looking for them as destinations recover from the abrupt halt in international travel, granting familiar, safe and well-prepared regions and countries a front seat in the new tourism wave.

The Azores has positioned itself as a nature-based destination, leveraging rich natural resources and combining the beautiful green volcanic scenery and the blue wild coolness of the Atlantic Ocean. Due to their geographic, orographic, demographic and social characteristics, the islands provide a privileged setting for slow travel and mindful experiences, on pair with intense adventure activities with an exotic background. Even though the islands are not consistently perceived as a front-end wellbeing destination, the type of tourist consumption that is possible to witness fits on the wellbeing tourism scope. From lush green scenery and hiking trails to peaceful and picturesque rural settings, iron-rich thermal hot springs, delicious fresh seafood and exquisite cuisine, peaceful and welcoming people, and paradise-like coastal areas and beaches, the Azores can well be a trendy European destination on the post-pandemic future for wellbeing seekers.

As with all the project partners, this destination audit aims to provide a summarised analysis of the wellbeing tourism industry in the Azores. The traditional approach to this sector's scope has its own specificities in Portugal and in the region, limiting its understanding, development, and available data. Nonetheless, the report includes:

- Data on the tourists' profile and behaviour.
- Marketing insights and trends.
- The policy context at a national and regional level.
- Other wellbeing tourism business support infrastructure.

Following the same structure as other partners' destinations audits, the document briefly exposes the results of the IO2 business survey in the Azores, regarding:

- Stakeholder views on the current market.
- The regional context.
- Opportunities and barriers.
- Discussion of training needs.

1. Health and Wellbeing Tourism: The Portuguese Perspective

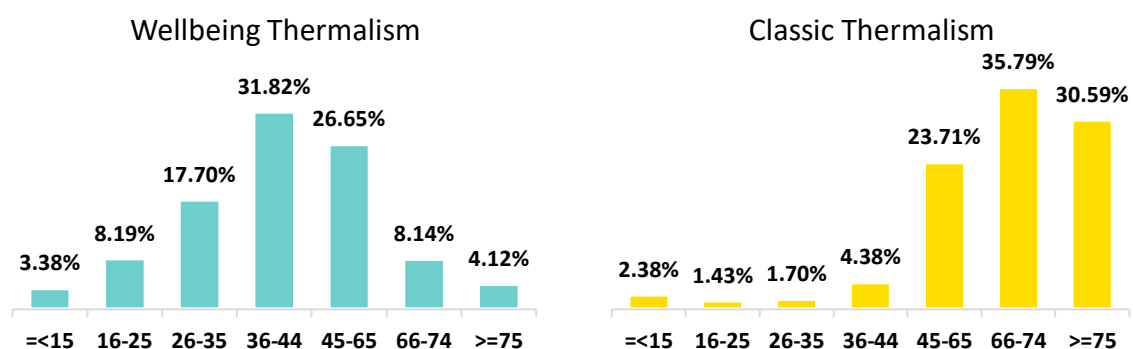
The Portuguese word for wellbeing is “bem-estar”. As in many other parts of the world, in the tourism context, this word has many different interpretations. For instance, “bem-estar” can be used when addressing “wellbeing” or “wellness” (since wellness has no direct translation to Portuguese). The discussion around the definition of wellbeing tourism is inherently rich, but the interchangeable use of certain words brings some confusion to the “fray” as well. It many times leads to a limited view of the concepts of wellbeing and wellbeing tourism. For this reason, wellbeing tourism in Portugal has been usually discussed with a narrow perspective, although more recently a new approach has been gaining ground.

Traditionally, wellbeing tourism in Portugal has been addressed as “Health and Wellbeing Tourism”. Several strategic documents and action plans have mentioned this type of tourism solely considering medical, wellness or thermalism activities. A broader view, considering other activities, like hiking or meditating, for example, are usually left out. In fact, in the Portuguese market, the «top of mind» activities in Health and Wellbeing Tourism are spas, thermalism, and hot springs.

Portugal has a long-time tradition in thermalism and hot springs, since the Roman period. Especially the northern part of the country has many world-known thermal facilities to enjoy such experiences and treatments. This strong tradition and the rich natural resources that have supported it might still have a deep impact on the concept of wellbeing tourism in Portugal.

In 2019, there were 47 licensed thermal facilities in mainland Portugal. During that year, 122,606 people used them. These users are distributed into two groups: Classic Thermalism (35.5%), which is related to healing and therapeutic activities, and Wellbeing Thermalism (64.5%), which is related to relaxing and leisure activities. Only 13,997 users were not Portuguese. From these, more than half were Spanish (30,1%) or French (22,9%). Distribution by age groups (Figure 1) shows that Wellbeing Thermalism has more potential among younger groups, namely the 36-44 years old, while Classic Thermalism attracts older people, namely those that are more than 65 years old. Health conditions and disorders associated with age seem to be reasonable explanations for this distribution.

Figure 1 - Thermalism users in Portugal in licensed thermal facilities



Source: Direção-Geral de Energia e Geologia (2020)

In what regards specifically Health and Wellbeing Tourism, past strategy focused on stimulus to the private investment to improve the quality and the joint promotion of medical and tourism activities. Again, it is evident a narrow perspective, focused on the therapeutic side of the discussion. However, the most recent approach to the national tourism strategy has brought a broader standpoint. Portugal's tourism official promotional website (www.visitportugal.com) currently presents the following description for Health and Wellbeing activities:

There's nothing like an old recipe using ingredients offered by nature to take care of your health and to escape routine: fine weather, sunshine, clean air, clear waters, and plants and algae with therapeutic properties. You can depend on it. It may be at a thermal resort or a spa, by the sea or in the mountains.

*There are different **health** and **well-being** programmes suitable for everyone. These relaxing moments, indispensable for **restoring balance**, can be undertaken in different ways. At a **thermal spa**, using traditional techniques, enjoying the **therapeutic properties and mineral richness of the waters**; taking advantage of the extensive **coastline** and the **Atlantic waters** for **thalassotherapy**; or through relaxation sessions based on the regenerating effects of **wine, chocolate or hot stones** which you will find at **spas and resorts** as a complement to a holiday taken in style.*

*With opportunities all over the country, **Portugal offers true havens to shake off the "diseases of modern life"** and find peace and inner serenity and **restore your energy**.*

Even though this new perspective still keeps a strong emphasis on thermalism and its therapeutic properties, it also brings forth a refreshed approach. Besides appealing to the engagement of the senses (wine, chocolate, hot stones), mentions to relaxation, escaping routine, destressing, finding inner peace, energy restoration and shaking off "diseases of modern life" grant much more importance to mental and spiritual wellbeing. It brings awareness to more offerings, businesses and experiences, creating a whole new set of opportunities.

2. Wellbeing Tourism in the Azores: a new cycle on the horizon

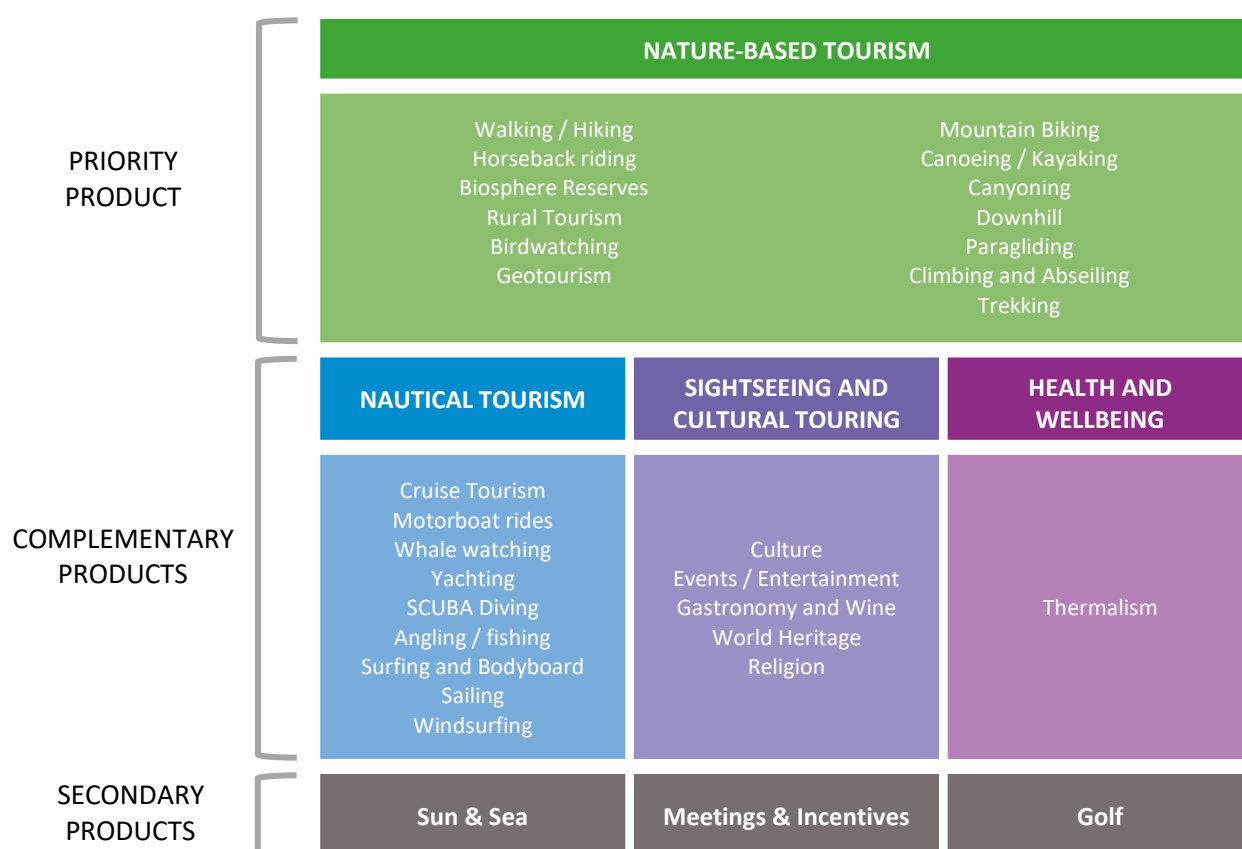
As in mainland Portugal, wellbeing tourism in the Azores has been traditionally related to thermal hot springs. The volcanic origin of the Azorean islands has generated a thermal paradise of iron-rich hot water pools surrounded by lush green backgrounds. These pools have been used for therapeutic initiatives, especially in the past, but more recently they have been particularly associated with general wellbeing and leisure, providing unique settings for relaxation and escapism. Still, the concept of wellbeing tourism in the Azores has kept a narrow perspective and has been quite sluggish to fully extend beyond thermalism.

2.1. Wellbeing in the Regional Tourism Strategy

It has been more than a decade since tourism planning at the national level has identified the Azores as one of the regions of the country with more potential for wellbeing tourism, even though lacking a more structured supply of activities, services and qualified workforce. Nevertheless, every time wellbeing tourism in the Azores is mentioned, it is usually focused on wellness and thermalism, highlighting favourable weather conditions, geothermal resources, and the beautiful background scenery.

In 2016, the Azores Regional Government presented a new strategic plan for the development of the tourism sector (PEMTA, 2016). Nature Tourism has been selected as the priority product for the new strategy, along with three complementary products: Nautical Tourism; Sightseeing and Cultural Touring; and Health and Wellbeing Tourism. Each of these generic products is then broken down into specific products and activities. Again, in the scope of Health and Wellbeing Tourism, only thermalism is mentioned (Figure 2).

Figure 2 - Strategic products for tourism in the Azores



Source: PEMTA (2016)

In fact, on the product-island matrix, the potential for Health and Wellbeing Tourism is only identified in three of the nine islands of the archipelago - São Miguel, Graciosa and Faial - precisely those where exploitable hot springs are available. This approach still keeps a very narrow perspective on wellbeing tourism. Currently, in www.visitazores.com, the official tourism promotion website, health and wellbeing experiences are described as follows:

The Azores have hydro-thermal resources, which have been known and exploited for centuries. There are various springs of natural carbonic water, waterfalls and iron water pools, which have been used since the sixteenth century. The highlight goes to the thermal baths Termas da Ferraria and the iron water pools in Furnas, on the island of São Miguel, and Termas do Carapacho on the island of Graciosa.

Nevertheless, scanning through the pages of the strategic plan for tourism in the Azores (PEMTA, 2016) and many other recent marketing materials, it is possible to understand that, even though not explicitly mentioned, wellbeing tourism (in the broad perspective) is critical for the destination's development. There are mentions to the local people's hospitality, tranquillity and peaceful living, high standards of safety and security, but also to the opportunity to develop services associated with mental and physical wellbeing, relaxation, destressing and resting. The pure lush nature, that offers both contemplative as well as active tourism opportunities, but also the genuine rural setting, the environmental quality, the mild climate and the local cuisine are all mentioned as resources that enhance the experience and provide a unique ambience for peaceful and regenerative stays.

2.2. The Tourists' Profile

In 2019, the Azores welcomed 971,794 tourists on the islands. It is a regional peak record, representing a growth of 15.6% from 2018. According to the Azores Tourism Observatory, tourists' overall satisfaction when coming to the Azores is very high, scoring 4.6/5 in 2019. Health and wellbeing activities are highly rated in tourists' satisfaction as well, scoring 4.5/5, only trailing behind birdwatching (4.6). Other activities with the same score are sports activities, sightseeing, jeep tours, whale watching and generic tours, some of which can easily fall into the wellbeing sector. The same report reveals that almost half (43,1%) of the tourists have decided to come to the Azores based on word-of-mouth. Interestingly, 57,8% resorted to direct booking, while 13,2% grabbed last-minute opportunities.

Germany, UK, Scandinavian countries, France, Spain and Italy have been identified as the inbound markets with the highest potential for Health and Wellbeing Tourism in the Azores. The main segments are couples without dependent kids, solo travellers, friends travelling together (especially women), and senior tourists. These travellers are seeking to recover their physical and mental wellbeing and undergo specific treatments in specialized fitness centres and spas. They want relaxing experiences and a mix of activities related to health and nature. The suggested positioning strategy aims at bundling health and wellbeing products (e.g., treatments, thermal baths, massage) with outdoor activities (including contemplation of natural scenery) and a very relaxing and peaceful ambience.

2.3. Hubs and Attractions

Since wellbeing tourism in the Azores has been associated with thermal hot springs, there are some special locations on the islands. These "hubs" have mainly been promoted based on their hot springs and spas, but there are many more resources and reasons for seeking broader wellbeing experiences in these locations, as in the rest of the islands. Among other

awards and honours regarding sustainability, heritage preservation and nature conservation, the Azores have been listed on the “Top-100 Most Sustainable World Destinations” by Green Destinations since 2014, formally certified as a “Sustainable Tourism Destination” by EarthCheck/Global Sustainable Tourism Council in 2019, considered “Europe’s Leading Adventure Tourism Destination 2020” in the World Travel Awards, and designated as one of Europe’s Safest Destinations 2021.

Graciosa is one of the smallest islands of the archipelago, with only 61 km². It has a thermal hot spring facility, Termas do Carapacho, that has been used since 1750 for therapeutic activities. The small size of the island, the locals’ hospitality and the low number of inhabitants create a peaceful environment and a sense of isolation that enable relaxation and a general sense of wellbeing. The whole island is classified as a UNESCO Biosphere Reserve and, therefore, tourism carrying capacity and infrastructure construction are limited.

In the biggest island of the archipelago, São Miguel, there is one very peculiar wellbeing “micro-destination”: Furnas. This small civil parish is located inside the caldera of a big volcano and has been one of the main attractions of the Region. Beyond the beautiful green scenery and an iconic volcanic lake, this location is known for being a unique hydropolis, with several secondary volcanism manifestations (e.g., fumaroles, boilers) and an incredible concentration of water springs. Many of them are believed to have medicinal properties. This powerful combination attracts tourists all year round for thermal water bathing and for enjoying the traditional stew cooked in the ground, while some hotels have leveraged the existence of hot springs. In Furnas, it is possible to enjoy several beautiful gardens, great vistas and hiking trails, huge waterfalls (Salto do Rosal and Salto da Inglesa), hot water pools and high-quality accommodation, including the world-known Terra Nostra Garden Hotel, Poça da D. Beija, Furnas Boutique Hotel, Beatriz do Canto Gardens and José do Canto Garden.

In São Miguel, there are also other wellbeing hubs. In Ribeira Grande, on the Northside of the island, in a small radius near the caldera of the Fogo Volcano, there are also natural hot water pools (Caldeira Velha), a small thermal water spa and the opportunity to taste the traditional stew cooked in the ground. The “pack” is complete with hiking trails, a beautiful set of waterfalls (Salto do Cabrito) that attract some canyoneers, great vistas and a view over a majestic volcanic lake. On the Western side of São Miguel, there is Ponta da Ferraria, an incredible place where one can swim in a mix of cool and warm seawater due to an underwater thermal hot spring. A wellness spa - Termas da Ferraria - is located right next to this unique place, offering a great variety of experiences and treatments.

All these Azorean wellbeing hubs have additional elements that contribute to creating other wellbeing experiences beyond wellness and thermal hot springs. Ribeira Grande, for instance, is known as the “Surfing Capital”, with great black sand beaches that have received several international surfing competitions. Furnas is very near one of the best beaches in São Miguel, Beach of Fogo, in Ribeira Quente, while Ponta da Ferraria has several natural seawater pools and is right next to Mosteiros, where a marvellous sunset can be witnessed, as well as to Sete Cidades, where incredible vistas and meditative experiences in nature are organized. Other islands also have incredible ambiances and resources for improving general wellbeing, like wild peaceful nature, genuine rural villages, mountains, hiking trails, beaches, events and

festivals, diving spots and delicious food. There is clearly potential to develop wellbeing tourism beyond thermalism in all the islands.

2.4. The Wellbeing Tourism Policy Infrastructure

The Azores tourism policy infrastructure includes several organizations. However, since the region is small there is great proximity between them, even though the government-controlled organizations are much influential than the remained other. Still, none of them is exclusively dedicated to wellbeing tourism.

Regional Government of the Azores

The Government includes a Secretariate of Transportation, Tourism and Energy, which comprises a Directorate for Tourism. The Government official website refers that this is the executive service responsible for implementing regional policies in the area of tourism. Its responsibilities are:

- a) Foster the use and preservation of the Region's tourism resources, namely the conduction of tourism planning studies in priority areas, with a view to the efficient use and adaptation of infrastructures to be implemented in those areas in coordination with the competent regional departments;
- b) Promote or support the actions developed as part of the regional tourism offer as well as tourism promotion initiatives or other similar actions, ensuring participation in such initiatives;
- c) Produce publications, texts and information of interest to the regional tourism offer;
- d) Collaborate with all regional, national or international services and entities regarding all matters of interest to the tourism sector, namely those involved in the integrated development activities or projects of interest to the regional tourism offer;
- e) Ensure the representation of the Region to official and private entities linked to tourism, with a view to the interests and goals of the sector as well as the participation in international and national organizations and events;
- f) Coordinate and supervise the operation and activities of the tourism offices;

This body may also commercially develop materials designed to promote the Region, namely through publishing, promotion, sale, rental or any other form of marketing.

Associação Turismo Açores - Convention And Visitors Bureau (ATA)

ATA is a private association whose purpose is to *promote the Azores destination as a tourist destination of nature, with a strong experiential component, in the strategic emitting markets, in order to increase, in a sustained way, the volume of overnight stays in all the islands of the Azores, as well as the increase of revenues for all the stakeholders of the sector.* This association works directly with the Regional Government in the international promotion of the Azores.

Associação Regional de Turismo (ART)

ART is also a private association that works cooperatively and complementarily to ATA. Its main goal is to promote tourism in 5 of the 9 islands, namely Terceira, Graciosa, São Jorge, Pico, Faial, Flores and Corvo.

Azores Tourism Observatory (OTA)

OTA mission is to promote the analysis, dissemination and monitoring of the evolution of tourism activity in the Azores. OTA has recently been admitted in UNWTO's INSTO - International Network of Sustainable Tourism Observatories.

AREAT - Associação Regional de Empresas de Animação Turística

AREAT is a private association of tourist entertainment companies. It is mainly focused on helping tourism entertainment companies to grow and sustain their businesses.

AGITA - Associação de Guias de Animação Turística dos Açores

AGITA is a professional association that represents tourist information professionals, including those working with circuits, local visits, hiking, cultural and thematic visits, school groups, personalized visits, walking tours, and group tours, in all the Azorean islands.

AOMA - Associação de Operadores Marítimos dos Açores

AOMA is a professional association that represents maritime operators, including diving professionals and companies, whale and dolphin watching operators and other sea-based activities.

Casas Açorianas

Casas Açorianas is an association of rural tourism businesses. It offers a joint promotion of small accommodation units scattered throughout the nine islands and has been awarded the Gold Medal for Tourism Merit by the Portuguese Government in 2008.

Access Azores

Access Azores is a private association whose mission is to find solutions but also to debate and raise awareness for the importance of accessibility, mobility and universal design in the rise of territories and on their development as tourism destinations.

CRAA - Centro Regional de Apoio ao Artesanato

CRAA is the Regional Centre for Handicrafts. As a Government-controlled organization, it aims to promote and divulge the officially Azorean certified handicraft products. CRAA is responsible for the implementation of regional policy in the areas of development and appreciation of traditional products, including the regional handicrafts and artisanal companies, professional training and the coordination of multifunctional initiatives with development in the local environment.

CCIA - Câmara do Comércio e Indústria dos Açores

CCIA is the Chamber of Commerce and Industry of the Azores. One of its departments is solely dedicated to tourism and the development of businesses in this economic sector.

2.5. New Perspectives

The Azores is a peripheral destination, with only 2.333 km² and around 242.000 inhabitants scattered around 9 small islands in the middle of the Atlantic Ocean. The small size of the territory, its (somewhat) remoteness, the low population density, the generalized rural setting, and the limited promotional efforts impose some limits to tourism development. However, all these features also create a great stage for slow travel, peaceful living and off-the-beaten-path experiences, which have helped a few companies and tourism researchers to develop new projects and new perspectives on wellbeing tourism. Among these, there are opportunities for creative, rural, eco-, culinary, and senior tourism, but also Positive Psychology and Marketing. These seem to represent what can be expected for the future of wellbeing tourism in the Azores. Below some of these projects are listed, namely research initiatives that are looking to find added valued solutions for the regional tourism sector.

CREATOUR AZORES – Turning the Azores into a Creative Tourism Destination

CREATOUR Azores is an integrated research-and-application project. Its main objective is to empower various agents located in the Azores archipelago to develop, implement, and promote creative tourism experiences through which tourists are provided opportunities to actively participate in creative activities providing opportunities for learning, creative self-expression, and interaction with local communities. A creative tourism approach allows both visitors and communities to benefit from tourism exchanges, promotes cultural vitality and sustainability, and allows artistic and creative activities to play a driving role in socio-economic development.

Green Gardens

The gardens of the Azores are of significant heritage value, in terms of their history, botany and landscape. They are considered as privileged settings for relaxing and contemplation, as well as for mindfulness and meditation sessions. The aim of the project is the scientific and technological consolidation of “Garden Tourism” in the Azores, regarding its historic gardens as a specific tourist product with great potential to promote the destination. It raises research issues, such as the assessment of the environmental, the patrimonial and aesthetic quality of the gardens, based on the findings in various subject areas; the correlations to be established between the vision of the experts and user experiences; and, also, the most effective communication strategies and mechanisms.

GREAT - Genuine Rural Experiences in the Azores Tourism

Tourism development in peripheral rural areas has had little attention and most rural communities are not prepared to deal with structural changes in their economy. People that live in these communities are commonly working on agriculture or fisheries, have low

education and do not have the appropriate skills to establish synergetic relationships with tourists and tourism companies. So, it is critical to capitalize on the strengths that exist in these communities, especially regarding their bond with natural resources, traditional economic activities, folklore, food, festivities and rituals. GREAT is trying to identify ways to structure innovative tourism experiences in rural areas and add value to local communities, contributing to the reduction of poverty and social exclusion and the increase in employment.

SCAPETOURL – SeasCAPEs promotion to diversity TOURistic products

The main goal of SCAPETOURL is to promote Nature tourism in the Azores, making use of its coastal and underwater resources, through the evaluation and design of ecotouristic trails to conduct coastal and marine touristic activities. SCAPETOURL project aims to promote a qualified offer that, sustainably, will allow the use of the valuable geological and biological heritage that differentiates the Azores from other insular destinations.

TASTE - Taste Azores Sustainable Tourism Experiences

This project is focused on the valorization of the regional gastronomy and wines as tourism resources. Gastronomy heritage, as part of the intangible cultural heritage, is seen as a source for local initiatives and a factor for the region's differentiation and promotion. Highly cultural, gastronomic and wine heritage can be used as differentiation factors of the Azores offer, linking products from the primary and secondary sectors and culinary traditions to unique sensory and rational experiences in each of the nine islands, promoting a sustainable tourism growth.

TU-SÉNIOR 55+ - Elderly Tourism and Wellbeing in the Azores: Creation of a Cultural Program

TU-SÉNIOR 55+ aims to build an elderly tourism program to fit a period of around 5 days to a week, asserting on self-identified senior citizens' motivations in visiting the Azores, respecting all of their dietary, physical, and overall functional restrictions. It is also a goal of this program to provide its public with experiences of thermalism (the use of thermal waters for the promotion of a person's wellbeing), while also being educated on the Azores' natural and cultural patrimony and being exposed to active wellbeing and ageing.

Turiviva+: Senior Tourism: Well-being Routes and Local Experiences in an Island Ecosystem

Turiviva+ is aiming at consolidating innovative Positive Tourism oriented products (well-being and positive emotions tourism). These products will be associated with Cultural Tourism and Ecotourism, with specific products based on the Azorean reality, anchored in the differentiating factors of the Region, including biodiversity and natural heritage, history and cultural heritage (musical, gastronomic, traditions, etc.), in the religious heritage and religiosity, and in the narratives and memories of the relations of the elderly with the emblematic places of the six municipalities of S. Miguel Island.

2.5. The Wellbeing Tourism Business Landscape

Nature is the main motivator for travelling to the Azores. However, the exquisite combination between paradise-like scenery and delightful hot water thermal pools and hot springs has become a relevant attractiveness factor. Many visitors whose primary motivation is not related to wellness activities are frequently enjoying such experiences after their nature adventures or cultural tours. In fact, some companies have arranged packaged tours that comprise thermal water bathing in full-day or half-day tours, even though collaborative work is still not being fully leveraged. More recently, other initiatives have shown up, offering week-long wellness retreats and training. Here are some examples.

Wellness Providers



Example: Termas da Ferrara

Termas da Ferrara is a thermal spa located on the western coast of São Miguel Island. Leveraging special volcanic phenomena and two underwater hot springs, the spa offers several wellness treatments and experiences. This establishment has been in operation since the mid-1900s, but the properties of its thermal waters are reported to have been used since the late 1500s. It has a mix of therapeutic and general wellbeing services on offer, including physiotherapy sessions, thematic programs for groups and couples, thermal water pools, and individual massage sessions.



<http://termasdaferraria.com/en/>

Bridging the Gap Between Wellness and Wellbeing | Example: Terra Nostra Garden Hotel

Located deep inside the small civil parish of Furnas, Terra Nostra Garden Hotel is an iconic hotel in the Azores. Its beautiful and exquisite 18th-century garden is home to a great variety of plants and trees, including more than 600 species of camellias. The garden also comprises a unique iron-rich thermal water pool, where one can experience a relaxing swim



with temperatures around 35°C to 40°C. It is definitely one of the highlights in the Azores. The hotel has been collecting several awards in the last few years, including Portugal's Leading Boutique Hotel 2020, by the World Travel Awards. Beyond the incredible experience in the garden and this pool, the hotel has a wellness spa with several treatments and relaxation experiences, some of which leveraging the garden's best resources and the immersive connection with nature it provides.

www.bensaudehotels.com/terranostragardenhotel/ / www.parqueterranostra.com

Wellbeing Tourism Providers: Shorter Retreats

Example: Furnas Boutique Hotel

Combining nature-inspired-interiors with a full wellness program, Furnas Boutique Hotel & Thermal Spa invites its visitors to embark on a unique sensorial journey through the ancestral power of the famous Furnas thermal spring waters “Quente das Quenturas” and the experienced hands of therapists. The hotel’s spa is complete with more than 10 treatment rooms, offering the best treatments and services, including massages, body and face treatments, reflexology, exfoliations, whirlpool, among others. You can enjoy a full hydrotherapy circuit using Furnas thermal spring waters, including Sauna, Laconium, Turkish Bath, Aromatic Showers and Dynamic Swimming Pools. The spa offers an incredibly rich portfolio of sensorial experiences, massages and body treatments, resorting to oriental (ayurvedic and shiatsu) and occidental techniques, as well as to a panoply of “magical” ingredients, including volcanic rocks, pineapple, Azorean green tea, volcanic clay, olive oil, lemon, rosemary oil, essential oils, seaweed, sugar, spices, sea salt, local herbs and pure shea butter.



www.furnasboutiquehotel.com

Wellbeing Thermalism

Example: Poça da Dona Beija

Poça da Dona Beija is a particularly successful wellbeing spot in Furnas. Besides being a leisure area that provides moments of pure relaxation, Dona Beija’s thermal pool is also a place to revitalize and restore the harmony between body, mind, and nature. This high-quality set of thermal pools hidden among luxurious vegetation provides iron-rich geothermally heated water that has been historically associated



with healing certain disorders, including anaemia, allergies, acne and parasitic diseases. There are different experiences on offer, including 39°C thermal pools with small cascades, a hot spring in a magical cave, open-air sauna, massages and a special leisure area that mixes the cool water from the stream that runs through the complex and geothermally heated water to rich the inviting temperature of 28°C. This is always a great experience to relax body, mind and soul. At night it offers a mystic immersive experience to be cherished and remembered.

www.pocadonabeija.com

Holistic Wellbeing Experiences

Example: Holistika Azores

Holistika is exclusively dedicated to the promotion of awareness and wellbeing on São Miguel island, as a privileged destination of pure connection with Nature. Operating under the slogan “Meet Your Own Nature”, Holistika offers unique experiences, including sightseeing, events, retreats, relaxing activities and therapies. The island’s visitors can combine sessions of yoga, meditation, therapies in the hot springs and therapeutic massages in natural surroundings, as well as participate in special events that intend to liberate the language of the heart through the manifestation of various arts and therapies. Sensorial stimulation is a common element to Holistika’s experiences, which range from dharma yoga, pilates, handpan, meditation and sound massage, mindful canoeing in a stunning volcano crater lake and nature meditation.

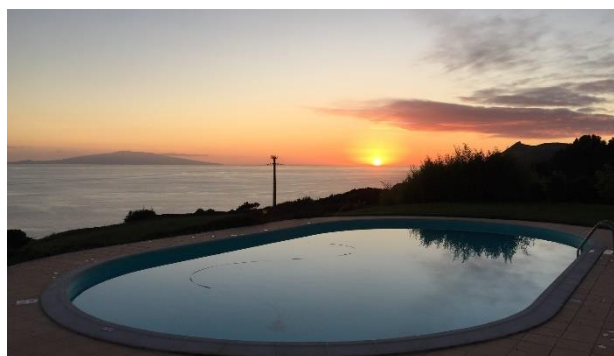


<https://holistika.pt/>

Collaborating to Provide Wellbeing

Example: L(i)fe! Wellness

L(i)FE! Wellness is a network of partners that works to bring together the best wellbeing experiences the Azores has on offer. This network aims to develop an Azorean wellness tourism model based on a collaborative network of high-quality, hospitality-focused accommodations across multiple islands which offer services and experiences to satisfy your sense of



well-being and ensure that you have an unforgettable enjoyable stay. On this initiative’s website, one can find handpicked accommodation, wellbeing packages and experiences. The core concept of the network is strongly directed to help visitors enjoying life as they personally feel it should be lived, with low stress, high enjoyment and meaningfulness. Experiences range from meditation, massage or yoga; leisurely walks along the unspoiled trails and coastlines; more challenging hikes up Pico mountain; or for the more adventurous: canyoning, surfing, paddle-boarding, kayaking, or snorkelling into hidden grottos. The packages include 7-day wellness retreat, as well as multi-day multi-island adventures.

<https://lifewellnessazores.com/>

3. Findings from the IO2 Stakeholder Survey

The survey was sent to an extensive list of tourism businesses and organizations. The 10 respondents who completed the survey described themselves as wellbeing tourism businesses.

Defining Wellbeing Tourism

The definition of wellbeing tourism seems to find a common ground for wellbeing tourism businesses in the Azores. Although it presents a broad scope, it also comprises some specific features that might be related to the destination itself.

On a general sense, the promotion of personal health and wellbeing seems to be at the core of this type of tourism. That is achieved through the engagement in physical, psychological and spiritual activities that generate benefits, push away stress, and provide relaxation and enjoyment of the place of visit. Welcoming, comfort, slow tourism, sport and a positive state of mind are also mentioned, as well as the contact with local specificities and identities, no pollution or mass tourism. However, the enjoyment of nature with a high awareness of the environment seems quite relevant for the Azorean wellbeing tourism businesses.

The Policy Context

Regional policies regarding wellbeing tourism seem to be unknown for some respondents, and there is even some criticism pointing out a lack of vision to leverage this “sector”. However, mentions to nature and sustainable tourism are found on several answers. Beyond the fact that the Azores have been awarded some international sustainability awards, there are mentions of sustainable lodging, training of natural park guides and the promotion of nature-based tourism businesses.

Barriers and Opportunities

The “shortage of skills” and the “lack of funding” emerged as the most relevant barriers to wellbeing tourism growth. The “lack of marketing/branding” and the “lack of training” are also looked at with concern, followed by the “shortage of staff”.

Contrarywise, “marketing/branding” is seen as the biggest opportunity for the growth of wellbeing tourism in the Azores. The “post-Covid-19 behaviour” gathers some attention as well, while the “policy support” and “collaboration” are also mentioned by 50% of the respondents, closely followed by “business support”. “Infrastructure development” comes last.

Skills Requirements

The Azorean respondents are unanimous when highlighting “wellbeing qualifications” as the most important skill to succeed in this sector. “Marketing” and “customer service” come right after. “Product development” is relevant for 50% of the respondents, followed by “presentation skills”. “Cross-selling/collaboration” and “sales” come last.

It seems that beyond the technical skills regarding wellbeing practices, skills relating to strategic marketing and planning might be fundamental for wellbeing tourism business development.

Wellbeing Tourism in the Azores

When asked at what stage is the wellbeing tourism sector in the Azores, more than two-thirds of the respondents stated it is “developing”, while the remaining considered it as a “new” sector. Additional comments referred, on the one hand, that tourism is just starting in the Azores, while, on the other hand, pinpointed that each island has its own reality. Either way, it has become clear that wellbeing tourism is on the initial stages of development in this destination.

Interestingly, Azorean respondents consider that the region’s branding/marketing in terms of wellbeing tourism is “good” or “very good” (with a slight ascendancy of the “well” option). Still, one respondent was not sure. Additional comments recalled that the Azores is just starting and learning how to brand itself, while some characteristic brand elements have emerged, including the air quality, the strong connection with nature, bathing in “healing water” and pure relaxation.

In what regards events, the majority of the respondents believe that wellbeing tourism events take place in the region. Events are mainly small-scale and organised by local businesses. Interestingly, respondents answered this question considering the broad perspective of wellbeing tourism, since they mentioned very different events and activities, including trail run competitions, sustainability conferences, spa meetings, gastronomical shows, scuba diving meetings, hiking and walking events, as well as yoga retreats. Pico Zen Festival is an example.

Wellbeing Visitors to the Azores

In what regards the respondents’ visitors, “couples” were mentioned in every answer. “Families”, “solo travellers” and “luxury travellers” are also very relevant. “Millennials” also featured some answers, while “other” just got one.

Visitors are coming mainly from Europe and North America. The national comes third, followed by South America and Australia. On the last position comes Asia and the Regional market. Notwithstanding, it should be stated that, according to the official tourism statistics, Portugal (i.e., the national market) is the main inbound travel market for the Azores.

“Walking/the outdoors” was selected by all respondents as the most important reason wellbeing visitors visit the Azores. This is consistent with other answers and with the destination’s strategy. Right after, and probably somewhat related, comes “adventure”, followed by “scenery”. Then, “mountains” and “food” show up. “Forests”, “other” and “craft” also pick some points. Surprisingly, “spa” has no answer, similar to what happens with “yoga”. Some particular activities are mentioned in the comments, and all of them are nature-related: horse-riding, scuba diving or snorkelling with mantas and whale sharks.

These results are quite interesting. Even though wellbeing tourism in the Azores has been discussed based on a narrow perspective that excessively focuses on thermalism, especially in what regards the policy support and strategic planning levels, it seems that the discussion may need some adjustments. Maybe the Azores should be looking to wellbeing tourism with a different understanding while working to explore the outdoors as a cornerstone for the destination's differentiation in this sector.

Product Design

There seem to exist several features that are important when planning/designing a wellbeing tourism experience in the Azores. However, one stands out since it is selected by all the respondents: "activities". "Nature", "atmosphere" and "location" come right after, followed by "food", "culture", "staff" and "facilities". "Accessibility", "uniqueness" and "treatments" also get some mentions, while "other" is only selected by one respondent. In the comments box, "tranquillity" was referenced by one respondent.

When asked with what sectors wellbeing tourism crosses over, Azorean respondents were keen to point out "accommodation providers", "food providers" and "adventure activity providers". This seems to completely cover the main tourism supply chain in the destination. Craft producers were barely mentioned, while "other" comes last. One respondent wrote on the comments box that tourism crosses over with all sectors.

Conclusions

Considering the Azores regional tourism landscape, it is possible to understand that, on general terms, wellbeing tourism is still very much considered from a limited point of view, that narrows down its comprehension and possibilities for growth. On the one hand, keeping an excessive focus on thermalism - either for leisure or healing - hinders the ability to fully understand the opportunities that may arise from the cross over with other "sectors", resources and activities, like forests and woods, the sea, gastronomy, and mindfulness. On the other hand, unreasonably anchoring wellbeing tourism in thermalism seems quite disproportionate, since supply is not that abundant and the quality standards might not be adequate to fully answer to the market's demands.

While from a public policy standpoint wellbeing tourism is still faced with a limited scope, private initiatives have been creating new products and developing differentiated businesses that are widening the wellbeing tourism horizons. Wellness and mindfulness retreats, as well as slow travel initiatives and awareness-building activities, are emerging as alternative solutions to the mainstream experiences on offer. These new offerings are capitalizing on the Azores' best resources, including its peaceful nature and hiking trails, rural tranquillity, black sand hidden beaches and seawater natural pools, air quality and mild climate, and also, naturally, thermal hot springs. Connection with other activities has also been interesting to document, including trail running, snorkelling with whale sharks and dolphins, wine tasting in old cellars, stand-up-paddle yoga in volcanic lakes, canyoning, or meditation sessions in volcano calderas.

The regional strategy comprises “Health and Wellbeing Tourism” as strategic product, but has been approaching it only from a limited standpoint. However, the destinations’ characteristics, the tourists’ behaviour, and the new products that are being designed show the great potential that a more structured approach and a broader perspective of wellbeing tourism may bring to the Azores. The Covid-19 pandemic has brought serious and, obviously, unexpected challenges to tourism worldwide and the Azores in particular. Leveraging recent changes in the region’s air accessibility, the Azores were on a very promising growth stage as a tourism destination, that had led to relevant investment decisions, both on the private and on the public sectors. The whole tourism sector was still embracing this new paradigm and producing structural changes that were expected to confer increased competitiveness and attractiveness to the destination.

In the same way that wellbeing activities were benefiting from that driving force, the pandemic has seriously impaired their development on the short-term. However, considering some key-claims from international references, like the Global Wellness Institute (GWI), the ATTA - Adventure Travel Trade Association and TripAdvisor, the Azores may well be positioned to be an important wellbeing tourism destination on a near future, capitalizing on some changes on the consumer behaviour. On the one hand, the ATTA and TripAdvisor refer that outdoor travel will increase and nature-based destinations will be the first to recover, while, on the other hand, GWI targets slow and mindful travel as driving trends for 2021. Due to the destination’s characteristics, these trends indications may well be relevant boosters to the development of wellbeing tourism in the Azores, capitalizing on rich natural resources, safe and tranquil settings, as well as unique conditions to provide well-rested and mindful experiences with a deep connection with nature. Still, adequate training and marketing efforts must be undertaken in order to achieve a better preparation for the new challenges that will be arising in the sector.

List of Resources

<https://www.visitportugal.com/en/experiencias/saude-e-bem-estar>

<https://estrategia.turismodeportugal.pt/>

<https://www.dgeg.gov.pt/pt/areas-setoriais/geologia/recursos-hidrogeologicos/exploracao-de-aguas-minerais-naturais/termalismo/>

<https://portal.azores.gov.pt/web/drturismo>

<https://www.visitazores.com/en>

https://www.azores.gov.pt/PortalAzoresgov/external/portal/misc/PEM_ACORES2.pdf

<https://sustainable.azores.gov.pt/en/>

https://srea.azores.gov.pt/conteudos/Relatorios/lista_relatorios.aspx?idc=29&idsc=1123&lang_id=1

<https://fgf.uac.pt/en>

<https://otacores.com/inqueritos/>

<https://goodtravel.guide/portugal/azores-green-holiday/>

<https://www.adventuretravelnews.com/charting-the-adventure-travel-industrys-path-to-recovery>

<https://www.adventuretravelnews.com/the-future-of-adventure-travel-in-the-wake-of-covid-19>

<https://www.tripadvisor.com/Covid19WhitepaperMay2020>

<https://www.globalwellnesssummit.com/trends-2021/>