

CONTEMPORARY SPA TOURISM DEVELOPMENT TRENDS WITH REFERENCE TO THE REPUBLIC OF SERBIA

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Abstract

Spa tourism refers to all travels that are organized for the purpose of treatments based on natural healing resources (thermo-mineral springs, mud, radioactive sand, climate) carried out under medical supervision. Globalization and the development of modern society have led to changes in spa tourism, shifting from traditional tourist activities to modern and complex health and recreational activities. The aim of this paper is twofold. Firstly, to analyze contemporary trends in spa tourists' motives and, secondly, to perform a comparative analysis of the projected and realized development of spa tourism in the Republic of Serbia by examining the data on the number of tourist overnight stays and occupancy of accommodation facilities in spas and climatic health resorts. By applying descriptive and comparative scientific methods, it was concluded that contemporary trends in spa visitors' motives have caused a wider tourist offer of the spas and that there is a significant lag of realized development in relation to the projected development of spa tourism in the Republic of Serbia.

Key Words: *spa tourism, demand in spa tourism, supply in spa tourism, spa tourists' motives, growth models*

JEL classification: *Z30, Z32*

Introduction

Health is the oldest and the strongest motivating factor for visiting tourist destinations. The importance of tourism in preserving and promoting health can be demonstrated through (Hitrec, 1996):

- Prevention of disease (prevention),

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- Recovery from illness (rehabilitation, convalescence),
- Healing (curative).

The term health tourism was defined for the first time in the early 1970s when the World Tourism Organization published the study "Health Tourism". The study highlights the link between health and tourism, as well as the importance of tourist travels in order to preserve all aspects of health. Also, the importance of using mineral water and climate for the prevention of many illnesses was emphasized (Živanović, 2015).

Carrera and Bridges (2006) define health tourism as "organized travel outside one's local environment for the maintenance, enhancement or restoration of an individual's wellbeing in mind and body" (p. 447). According to Kušen (2011), health tourism is "tourism product made of a combination of services in one or more health-tourism facilities, located in the health resort within the health tourism destination" (p. 96).

Within the framework of previously defined health tourism, spa tourism has developed representing a growing and promising branch of the world economy. "No tourist segment is at present marked by such a massive expansion of offers like the ones of spa tourism" (Fontanari & Kern, 2003, p. 20). Spa tourism is "widely recognized as a basic element of health and wellness movement, covering a wide spectrum of holistic curative and preventive activities" (Stănciulescu et al., 2015, p. 159). "Spa tourism relates to the provision of specific health facilities and destinations which traditionally include the provision of mineral and thermal waters but which may also be used to refer to tourist resorts which integrate health facilities with accommodation" (Hall, 2011, p. 6).

Due to the diversity of natural healing resources, the Republic of Serbia boasts a long and rich tradition of spa tourism development. However, the diversity of resources and the long and rich tradition are not a guarantee of the enviable level of spa tourism development in modern times. Many spas in the Republic of Serbia are neglected and require revitalization, which is predicted in the strategic documents of tourism development, but not realized in practice. Tourism Development Strategy of the Republic of Serbia for the period 2016 – 2025 ("Official Gazette of the RS" No. 98/2016), among other things, contains a vision and numerous goals of tourism development with a projected ten-year growth and development of this activity. However, it is often the case that real values do not reach the projected size. Because of that, in addition to the always current question

of examining contemporary trends in tourist motives, the additional goal of the research is to answer the question of whether the plans set by adopting the mentioned strategy are being realized.

In line with the stated twofold research goal, the starting hypotheses of this paper are:

H1: Modern trends in spa visitor motives cause the multiplication of spa tourism products and the enrichment of spa tourism offer.

H2: Realized number of overnight stays and occupancy of accommodation facilities in spas and climatic health resort of the Republic of Serbia deviate negatively from the projected values given in the strategic documents of tourism development.

The descriptive and comparative scientific method will be applied in order to fulfil a defined research goal, test the initial hypotheses and formulate valid conclusions about a research problem.

Demand and supply in spa tourism

Spas are natural health resorts opulent in healing water, pleasant climate and other natural healing resources that relieve problems and help in the healing process through various therapeutic services provided by qualified staff (Milićević, 2015). According to Erdelia et al. (2011) "the main function of spa tourism resorts is to provide health care services by utilizing natural factors for medical care in specialized structures and in a pleasant environment" (p. 41).

International Spa Associations (ISPA) divides spas into (ISPA, 2019):

- *Club spa* - spas where the primary offer is fitness but also have a wide range of professional spa services on a daily basis;
- *Day spa* - spas offering a variety of professional spa services, also based on daily use;
- *Destination spa* - spas where visitors develop healthy habits; this lifestyle transformation can be achieved by providing a comprehensive program that includes spa services, physical fitness enhancement activities, wellness education, healthy eating and special interest programs;
- *Medical spa* - spas whose primary role is to provide comprehensive medical, wellness and spa services that employ full-time physicians;

- *Mineral springs spa* - spas where natural mineral, thermal or seawater sources are used in hydrotherapy treatments;
- *Resort / hotel spa* - spa, fitness and wellness programs that are part of the resort / hotel.

Spas can also be divided based on natural factors that affect human health, so there are spas with natural mineral springs, spas with healing mud, as well as air spas. The Spa Association of Serbia (2020) gives another division of spas by the fields of medicine, that is, by the therapeutic properties of natural factors used for the treatment of certain diseases, rheumatism, neurological diseases, locomotor apparatus, cardiovascular system, gastrointestinal tract, gynecological diseases, metabolic diseases, non-contagious skin diseases, respiratory diseases and diseases of the urinary tract. A common feature of all these types of spas is the use of natural healing factors for improving health, whether it is prevention, therapy or rehabilitation.

With regards to the above mentioned, it is difficult to separate where the medical function begins, and where the recreational function ends, as well as when natural-healing agents end and when the tourist is in the center of spa tourism, so it can be concluded that there is an inter-functional link between tourism, recreation and health (Segić, 2011; Ljubisavljević & Živanović, 2019).

Two basic components of the development of spa tourism and tourism, in general, are tourism demand and tourism supply. These components cannot be observed and analyzed separately due to their complementarity.

One of the definitions of tourist demand was given by Stefanović and Gligorijević (2010) according to which tourist demand is a set of potential tourists - consumers who determine quantities, quality and prices of individual goods and services in the tourist market by their attitudes, habits, desires and opportunities.

Since spa tourism is not dependent on weather conditions, the demand for spa tourism is not seasonal, as in the case of other types of tourism, and does not decline during the year. This specificity of the demand for spa services indicates its continuity and represents a competitive advantage of spa tourism in relation to other types of tourism.

Constituent elements of spa tourism demand and tourist demand in general are (Milićević, 2015):

- Human need for tourist travels in the country and abroad;
- Solvency of the carriers of tourist needs and their willingness to buy;
- Vacancy time.

Important motives for going to one of the spa destinations, and important drivers of the demand for spa products, are a reduction of pain and stress, reduction of the effects of aging, reduction of weight and need to improve health. Increased demand is influenced by various factors, among which the most prominent are: the increase in the number of elderly people, increase of stress in daily life, change of the way of spending free time, eagerness to learn about healthy lifestyle, finding alternative therapies, practising fitness.

Many guests are referred for rehab to spa destinations after a medical procedure. In most countries, and not only in the countries of the former socialist system, the demand for spa services has been formed mainly by "doted guests", ie. persons whose costs of treatment and stay were fully or partially covered by social security funds. These guests, in fact the patients, and consumers of the mentioned funds, used the services of traditional thermalism, while they stayed in hospitals and similar institutions, with strict medical supervision, after surgical procedures undertaken as a result of diseases, accidents etc. (Hitrec, 1996). Today, when the number of insured persons is significantly reduced, spa customers, or entities of seeking spa services, have to use other sources of financing, such as additional insurance or financing from private sources, in order to finance their stay. Types of financing travel to spas also influence demand movement in spa tourism.

The demand for spa tourism services can be divided into the following categories (Kanittinsuttitong, 2018): "body care, mental care and spiritual care". This indicates that demand entities have a variety of needs that they wish to satisfy by staying in the spa, therefore the offer in spa facilities must meet the multiplied requirements of visitors in order to continue the development of spa tourism.

On the other hand, tourist offer means the total quantity of goods and services offered to tourists under certain conditions. In the case of spa tourism, the offer aims to meet the needs of tourists traveling for medical

and other complementary purposes to spa destinations (Płaziak & Szymańska, 2014).

According to Milićević et al. (2012), the quality of tourist experience in modern spa destination depends, among other things, on the quality of medicinal factors, the modernity of infrastructure, the quality of health and other services, as well as on the qualifications and hospitality of the staff employed. Modern spas are expected to offer a variety of cultural-entertainment, sports-recreational and conference programs to their visitors. Facilities, where spa tourism is conducted, must be on accessible locations, while the premises must be functional and meet all aesthetic criteria.

The offer in spa tourism is highly dependent on the existence of natural-healing resources in the form of thermal mineral waters. This resource, that is crucial in the development of spa areas, needs to be explored on scientific and empirical basis in order to get the fullest possible frame of the tourist offer. These studies require investment and time. After conducted researches, and in order for a destination to become a tourist destination, it is necessary to invest additional funds in the facilities, infrastructure and hiring of professional staff. From the above mentioned, it proceeds that supply in spa tourism is inelastic, since it takes a long time for supply structure to adjust to demand structure and changes in tourism market.

Other characteristics of spa tourism often refer to its "complementarity", meaning that this type of tourism compensates off-season occupancy of the accommodation capacities offered through other forms of tourism. In addition, it is the form of tourism that requires special (medical) infrastructure and medical staff, which is not the case with other types of tourism activities. These are very expensive facilities: real estate, technical devices, equipment, qualified personnel (Hitrec, 1996). Spa tourism services are expensive, so filling capacity is achieved through high investment in marketing and promotion of spa vacations. In addition, offer in spa tourism has to include quality and complete medical service in the field of rehabilitation and prevention.

Previously stated points to the complexity of spa tourism offer, whereby the quality of total output, which directly reflects on the economic results in this form of tourism, depends on the quality of inputs and the quality of the process of providing individual services.

Modern trends in spa visitors' motives

Increasing globalization of the world and the aging of population of economically strong countries, rapid and stressful way of life, and development of emissive tourism, influence the need to approach health tourism and all its manifestations from a whole new perspective and with the attention that such increasing form of tourism deserves today (Madžar et al., 2016).

In contemporary conditions, with the help of modern media, the average tourist can easily access all the important information about tourist destinations. In the case of spa tourism, it is particularly important to inform tourists about the expertise of staff who work in specialized spa tourism facilities. At the same time, a greater flow of information, exchange of knowledge and experience, and, in general, improved communication between specialized staff working in spas, contribute to better meeting the needs of visitors and, ultimately, to the rapid development of spa tourism.

In addition to the high availability of information, low-cost airlines contribute to the increased mobility of modern tourists, which make the travel destination more affordable with affordable ticket prices. It is also possible to notice trend of change here, because some time ago, the movement in tourism was related to the departure to the most developed countries with the best technology, while today the direction of patient movement is reversed (Madžar et al., 2016).

Changes in the tourism industry are constant and intense. Tourism consumption has increased, the number of shorter vacations instead of one long vacation has increased, and the number of older tourists who have a higher ability to pay has increased (Radnic et al., 2009). Tourists are spending more and more money for holiday on accommodation and travel as well as on off-boarding offers. Special package arrangements are offered to target groups of tourists by caterers, including "weekend" arrangements which demand has increased.

A new millennium has brought new desires, needs, preferences, and consequently tourists' demands. Trends in tourists' motives are changing, the population's need for recreation is increasing, the population is older, but the sources of financing that tourists use for their holidays are increasing. Also, there is an increased awareness of the importance of prevention, people are increasingly using natural remedies and natural

treatments. According to Koskinen and Wilska (2019), "an increased number of people in affluent societies are trending toward more health-conscious lifestyles" (p. 259).

New trends in tourist behavior are also reflected in changes in spa tourism. Spas are moving from traditional tourism to modern tourism and complex health and recreational tourism and offer new facilities such as water parks, fitness and wellness services, beauty centers, various sports and cultural events. According to Radnic et al. (2009), spas "represent attractive tourist destinations, which are visited by young and old people, individuals, families with children, and have become suitable locations for conferences and congresses" (p. 76).

It is evident that spa destinations, in order to respond to modern trends and trends in visitors motives, include a wide range of complementary components in addition to the medical component. The intention is to enrich the spa tourism offer with positive effect on spa customers who want vacation, detox, recreation, weight loss programs, smoking cessation programs. These new spa tourism components are attracting not only tourists who need treatment, but also healthy tourists who finance themselves vacation in spa destinations due to awareness of importance of promoting overall physical, mental and social well-being.

Based on the above mentioned, it is concluded that contemporary trends in spa visitor motives have resulted in creation of variety of spa tourism products and enhancement of spa tourism offer, thereby confirming the first research hypothesis.

Projected and realised development of spa tourism in the Republic of Serbia

Article 4 of the Law on Tourism ("Official Gazette of the RS" No. 17/2019) stipulates that "tourism planning and development include: integrated planning of tourism development and related activities; proclamation and sustainable use of tourist space; jobs of particular importance for tourism development; categorization of tourist destination and implementation of incentive measures for tourism development".

Article 5 of the same Law stipulates that all planning documents: Strategic Master Plan, Strategic Marketing Plan, Tourism Product Development Program, Tourism Development Program and Program of Promotional

Activities must be in accordance with the Tourism Development Strategy of the Republic of Serbia.

The Tourism Development Strategy of the Republic of Serbia for the period from 2016 to 2025 ("Official Gazette of the RS" No. 98/2016) aims "to approach tourism systematically, not only through economic indicators, but also through the multiplier effects that tourism has on overall social development, local and regional development, development of culture and education, improvement of the environment and development of complementary activities (trade, agriculture, construction)". In this regard, the strategy emphasizes that "it is necessary for tourism to have significant place in the Government's strategic decision agenda in order to finally determine the ranking of the Republic of Serbia's ambitions towards this economic sector for medium and long term".

The strategy identifies two development periods (2016–2020 and 2021–2025) that describe the two growth models. Both models relate to the total accommodation capacities, namely to the accommodation capacities in hotels, camps, private accommodation, overnights, spas and climate health resorts, resorts and other accommodations. For the purposes of this paper, a comparative analysis of projected and actual achieved number of overnight stays in spas and climatic health resorts was conducted, that is, a comparative analysis of the designed and realized occupancy of accommodation capacities.

The growth model from 2016 to 2020, presented in Table 1, implied an increase of tourism through the alignment of supply with contemporary trends, renovation of existing accommodation, catering and congress facilities and services, raising the level of professionalism and staff training, raising the quality of accommodation for persons with disability, introduction of new attractions and products in already started capital projects, raising the quality of accommodation, promotion and reservations in rural and hunting tourism.

The total number of planned overnight stays of tourists in spas and health resorts for 2015 was obtained from the processed data for 2014 and amounts of 881,610, while it is expected that the number of overnight stays will increase to 1,354,735 by the end of 2020, that is, occupancy of accommodation capacity will be increased from 39.05% to 60.00%.

Table 1: *Growth model for 2016 – 2020*

GROWTH MODEL 2016 – 2020						
	2015			2020		
Structure	Accommodation (beds)	Overnight stays	Occupancy (in%)	Accommodation (beds)	Overnight stays	Occupancy (in%)
Spas and climatic health resorts	6,203	881,610	39.05	6,203	1,354,735	60.00

Source: *The Strategy of Tourism Development in the Republic of Serbia for the period from 2016 to 2025*

However, the current dynamics of spa tourism development in the Republic of Serbia, in the context of the increase in the number of nights and occupancy of accommodation capacities, indicates that the above projections were too optimistic (Table 2).

Table 2: *Number of overnight stays, number of beds and occupancy rate in 2015, 2016, 2017 and 2018*

TOTAL NUMBER OF TOURIST OVERNIGHT STAYS				
Structure	2015	2016	2017	2018
Spas and climatic health resorts	783,661	848,661	811,037	812,298
	ACCOMMODATION (BEDS)			
	6,207	6,196	5,947	6,023
	OCCUPANCY (IN%)			
	34.59	37.53	37.36	36.95

Source: *Statistical yearbook of the Republic of Serbia, 2016, 2017, 2018 and 2019*

In the period from 2015 to 2018 the number of overnight stays increased for modest 30 thousand, accommodation capacities decreased for about 200 beds, and the occupancy of accommodation capacities increased for approximately 2.5 percentage. Shown trends in spa tourism development, which are in average positive, are far from the projected values. At the annual level, the number of tourist overnights spent in spas and health resorts by the end of 2018 failed to reach even the level projected for 2015, where projected numbers for each subsequent year are even higher, and failure in their realization is more evident. Despite the decrease in accommodation capacities, which led to increasing the percentage of their occupancy, realized occupancy of accommodation capacities by the end of

2018 did not reach the level projected for the first year of the observed period. Less realized than the projected values of the number of overnight stays and occupancy of the accommodation in spas and climatic health resorts of the Republic of Serbia confirm the validity of the second research hypothesis.

Starting from the dynamics of spa tourism development, which was realized in the period from 2015 to 2018, it can not be expected for plans in 2020, regarding the projected number of overnight stays and occupancy of accommodation capacities, to be fulfilled, which indicates the failure of the first growth model.

The second growth model, from 2021 to 2025, presented in Table 3, assumes that the Republic of Serbia has implemented the first phase of development, that is, the tourist offer has met modern market trends, that the country has become a member of the European Union and that system for managing and strengthening tourism development is established.

Table 3: *Growth model for 2021 – 2025*

GROWTH MODEL 2021 – 2025						
	2021			2025		
Structure	Accommodation (beds)	Overnight stays	Occupancy in%	Accommodation (beds)	Overnight stays	Occupancy in%
Spas and climatic health resorts	6,203	1,354,735	60.00	6,203	1,580,524	70.00

Source: *The Strategy of tourism development of the Republic of Serbia for the period 2016 – 2025*

At the time of writing the Tourism development strategy of Republic of Serbia for the period 2016 – 2025, it was expected that the number of overnight stays would amount to 1,354,735 in 2021, and to 1,580,524 by 2025, assuming that the number of nights spent by foreign tourists would increase more, related to increase rate of overnight stays of domestic tourists. Also, it was expected that the occupancy of accommodation capacities would increase from 60 to 70 percentagewith unchanged number of beds. Given the unsuccessful implementation of the first growth model from 2016 to 2020, the projections outlined for the period 2021–2025 seem

even more unrealistic as the negative deviations of the real values from the projected values with the passage of time will become higher.

Presented data and a comparative analysis show that significant investments in spa tourism are necessary through infrastructure development, research of springs, adaptation of existing and construction of new accommodation capacities, education of specialized personnel, management training. The sustainable development of spa tourism requires an integrated approach according to its planning and management (Pavlović et al., 2009).

The transition process in the Republic of Serbia is still not over. The process of ownership transformation of spas, along with finding investors, would exploit the potential of spas in Republic of Serbia and thus increase the number of tourist overnight stays, both foreign and domestic (Ljubisavljević & Radosavljević, 2018). Besides, the attraction of investors, as a long-term strategic goal, would also result in increase in accommodation capacities in spas of the Republic of Serbia (Ljubisavljević & Gnjatović, 2020). In addition to attraction of individual investors, attention should also be paid to attracting institutional investors such as health care real estate investment trusts (REITs) and hotel REITs (Leković & Stanišić, 2017). The establishment of these funds in the Republic of Serbia (Leković et al., 2018) would have special effect, since the national economy, which has been in the process of transition for an unexpectedly long time of almost two decades, needs new sources of capital and new financial resources. At the same time with attraction of individual and institutional investors and establishment of REITs, it is important to establish "an adequate control mechanism that will ensure a sustainable development and balance between the three pillars of sustainable development - environmental protection, economic development and social development" (Ristić et al. 2016, p. 67).

Conclusion

By analyzing the issue of a modern concept of spa tourism development, it can be concluded that spa tourism is an increasing and promising form of tourism. Visitor demands of spa destinations have changed, so the offer needs to be upgraded and adjusted to the changed demand, in order to achieve the greater utilization of accommodation capacities in spa facilities.

The Republic of Serbia has enviable potential in this area. For the development of spa tourism, the role of the state, which would be able to solve the existing problems by adequate legal regulation and by attracting investors, is crucial. At the same time, the preservation of natural resources is of equal importance by default. By adopting the Strategy of Tourism Development, the Republic of Serbia has shown that development of this economic activity is one of the priority tasks in the development of the national economy.

The basic limitation of the research conducted in this paper is the time of its realization. Presented growth models are related to the period up to 2025 and the survey covers the period up to 2018, therefore the conducted analysis can be considered as an overview. In this regard, future research may be aimed at reviewing and once again comparing the achieved and projected results in the field of spa tourism.

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