

Are Serbian spas recognized as centres of contemporary health tourism – a study of domestic guest perceptions

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Abstract: This study assesses the current state and potential of Serbian spas as centers for contemporary health tourism, focusing on the perceptions and preferences of local guests. It examines how traditional spa services such as thermal pools and saunas are highly valued, while modern wellness programs and alternative treatments are less used but show growth potential. The survey assessing health and wellness service perceptions was carried out among Serbian citizens, particularly in Belgrade and the major spa towns of Sokobanja and Vrnjačka Banja, which together account for approximately half of the national spa turnover. Data was collected using both paper questionnaires and an online CAWI system, accumulating a total of 368 responses from June to September 2022. The study identifies significant opportunities for Serbian spas to expand and diversify their offering to meet changing market demands and emphasizes the need for strategic investment in infrastructure, service quality, and marketing. Through a comprehensive analysis, this research aims to inform and guide Serbian spas to adapt to global trends in health tourism and ensure their sustainable development and competitiveness.

Keywords: *spas, Serbia, services, health tourism, modernization, promotion*

JEL Classification: I21, J24, O15, Z32

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1. INTRODUCTION

Spa tourism has long held a prominent position among all types of tourism activities in terms of growth, development, and the provision of high-quality and diverse tourism services. In the fifties, the advancement of science and technology, especially in the medical field, has led to intense competition between natural health resorts such as spas and clinical medicine (Soh et al., 2021). Nevertheless, the concept of strictly specialized and unipolar spa centers is mainly outdated in the current conditions of tourism destination and product development, as stated by the International Congress of Spa Tourism held in Galicia in 1999 (Belij, 2016). In contrast to traditional spa stays, which were usually about convalescents recovering over several weeks, contemporary spas offer numerous health and recreational facilities and various services tailored to guests of different age groups. Visitors nowadays spend less time in spas to improve their overall health, reducing traditional and lengthy spa treatments or rehabilitation programs. Hrabrovski Tomić (2006) argues that for the reasons mentioned above, spas today can be seen as centers for the treatment and recovery of illnesses or injuries using traditional and alternative medicine methods, but also as destinations where guests can relax, have fun, and engage in various destination experience, that can include winter sports, golf, equestrian sports or cultural and congress centers. In addition, spas offer significant potential to promote self-awareness by providing environments conducive to personal well-being and mindfulness (Gulan et al., 2020).

For this reason, the development approach required modernization efforts that led to the expansion of healthcare facilities, the improvement of tourist facilities such as restaurants, and significant enhancements to essential transportation infrastructure. In addition, innovative strategies such as the clustering of spa facilities and the integration of advanced medical and other services were emphasized to meet the growing demand of tourists (Holod, Holovchuk, Moroz & Dudash, 2022). Also, it is

crucial for spas to provide comprehensive health tourism services to understand guest demands and effectively target specific groups with tailored service packages (Lövei-Kalmar, Jeles & Ráthonyi, 2019). Vichy in France is a notable example of a spa resort combining a traditional tourist image with recent requirements. Initially, the spa resort was characterized by being mononuclear and unipolar, meaning that tourism focused exclusively on the spa facility and included both treatment and accommodation (Kicošev & Dunčić, 2007). Vichy was transformed into a spa town with a diverse and multi-faceted character by constructing additional facilities and expanding leisure and relaxation activities.

Health tourism in Serbia is closely linked to spas and has a longer tradition than any other type of tourism. Serbia has considerable natural resources that contribute to its development, such as more than 1,000 mineral springs and abundant therapeutic mud and gas deposits. The interaction of climatic factors in Serbia creates advantageous conditions for health tourism, especially during the spring and autumn months, rendering this period ideal for spa tourist activities due to optimal Tourism Climate Comfort Index values (Marić Stanković, Radonjić, Petković & Divnić, 2022). As a result of that, spa tourism emerged in the second half of the 19th century and the first half of the 20th century. After the Second World War, the government significantly changed by setting up specialized rehabilitation hospitals in 20 thermal spas. This deviated from the original plan to have exclusive spa facilities, as described by Ljubicavljević and Radosavljević (2018). Today, spas continue to play an important role in Serbian tourism. In 2019, they accounted for 27.6 % of total overnight stays, declining to 22.0 % in 2023. In the Tourism Development Strategy of the Republic of Serbia for the period from 2016 to 2025, the Serbian government acknowledged the lack of progress in spa tourism. Outdated management models, inadequate marketing, and a lack of cooperation between the public and private sectors, were cited as the main problems. The Strategy states that *“the tourism sector of the Republic of Serbia should be able to efficiently and flexibly adapt its offer to modern trends on the global tourism market and offer authentic experiences, experiences and high-quality products that, together with traditional hospitality, form the basis for competitive recognition”* and that *“neither progress has been made nor significant investments have been made in improving the quality of tourism products, especially health and wellness tourism in spas”* (Official Gazette of RS, 2016, p. 37). In addition, the Strategy deline-

ates priority tourist products and locations in Serbia, with the objective of enhancing collaboration among principal stakeholders to improve competitiveness in international markets. The analysis conducted by Petković, Pindžo and Bradić-Martinović (2022) reveals that these initiatives have only partially identified the items and destinations selected by visitors, indicating a necessity for more coordinated and planned efforts to fully harness the potential of Serbian tourism. Such an observation emphasizes the importance of the present research, which aims to assess the perceptions and preferences of local guests in Serbian spas to determine whether sufficient demand exists to justify introducing new services.

The motivation for this study stems from the urgent need to modernize Serbian spas to meet the growing demands of global health tourism, which is important not only to improve the competitiveness of the sector, but also to adapt to the evolving trends in wellness and medical tourism that are reshaping the preferences of tourists worldwide. Consequently, this paper aims to comprehensively analyze and evaluate the current state and potential of Serbian spas as centers for contemporary health tourism by exploring domestic guests' evolving preferences and expectations towards spa services. The goal is to identify key trends, gaps, and opportunities that can inform strategic enhancements in service offerings, infrastructure modernization, and marketing efforts to better align with global tourism demands and ensure sustainable growth. The paper also addresses the literature gap by providing an updated analysis of Serbian spas in the context of modern health tourism, focusing on how traditional establishments can incorporate innovative wellness services to enhance their competitiveness and appeal in the international market.

2. CONTEMPORARY HEALTH TOURISM SERVICES

Emerging trends in the tourism market have driven spas to expand beyond the conventional medical tourism sector to include preventative medical services and wellness, which have now become an integral part of the spa offering (Milićević & Jovanović, 2015). In response to the trend mentioned above, many spas are changing the structure of their services, transforming traditional medical spas into contemporary spa centers. These centers now include not only medical treatments but also tourist, leisure, and wellness services. In their study, Koskinen and Wilska (2019)

and Konu and Laukkanen (2010) observed a shift in the motivations of spa guests and noted a corresponding change in the age distribution of visitors. They noted an increase in visitors from all age groups and a growing trend among guests to seek a comprehensive offer that includes not only physical and aesthetic care but also healthy eating, stress management, mental activities, and education. Nevertheless, a significant obstacle for many spas is adapting to these changes and catering to the needs of all guests while retaining their conventional medical clientele (Dimitrovski & Todorović, 2015).

A clear difference between health and spa tourism is also essential. Health tourism is geared towards medical treatments and therapies that have a health improvement goal, often involving professional medical oversight and utilizing natural therapeutic resources (Smith & Puczko, 2009). On the other hand, spa tourism, a subset of wellness tourism, focuses on relaxation and preventive health care through non-medical treatments such as massages and beauty services, promoting general well-being rather than addressing specific health issues (A Routledge Freebok, 2015). Today, health and spa tourism are increasingly intertwined, reflecting a trend where visitors seek comprehensive wellness experiences that combine medical benefits with relaxation and rejuvenation. Many modern spas have integrated medical services such as diagnostics and treatments for specific health conditions, alongside traditional spa offerings like massages and thermal baths, thus catering to both health improvement and relaxation needs within one facility (Konu & Laukkanen, 2010; Milićević & Jovanović, 2015).

From a theoretical perspective, various important factors influence the development of the tourism offer, which are also relevant for health and spa tourism. Firstly, Meller (2004) emphasizes the location's attractiveness, which is assessed according to both natural and social aspects. The natural potentials include the thermo-mineral springs, the climatic conditions, the floristic and faunistic diversity, and the social and cultural-historical landmarks and manifestations. To be able to utilize the offer appropriately, a suitable infrastructure is required, which includes traffic routes, transport systems, water supply, and wastewater disposal. Reception capacities, which include accommodation facilities and a supra-structure inclusive of amenities for catering, entertainment and recreation, shops, services, and similar offerings, are also necessary. However, despite the apparent need for change, Popescu (1991) also points to the principle of inelas-

ticity of supply resulting from gradual adjustments in attractiveness. From a pragmatic point of view, immediate control of natural conditions is not feasible, while the development of accommodation capacity requires considerable financial investment, so an immediate response on the supply side is unattainable.

Consumers of health services mainly determine what contemporary spa tourism offers, having in mind different perceptions of the users, as explained by Pinos-Navarrete, Abarca-Álvarez and Maroto-Martos (2022). Their primary motivation lies in professional health treatments aimed at eliminating or alleviating symptoms, and a growing number of people visit spas for relaxation and prevention, namely to maintain good health. Regardless of the user group, spas must offer visitors the overall modernization of the destination, ensure personal safety and hospitality, and provide accompanying amenities. In response to growing competition in the tourism industry, spas have diversified their services and tourism products to expand their offerings. In addition to spas, recreational tourism is also experiencing exponential growth. Wellness programs are now integral to spa services (Belij, Milosavljević, Belij & Perak, 2014). Nowadays, the aim of spas as destinations is to provide both standardized and customized services (products) to guests to gain and maintain a competitive advantage that includes aspects of local culture and customs.

The basic portfolio of spa tourism services (products) includes (a) Medical tourism services, which include surgical procedures, which in most cases do not involve complex operations but focus on plastic surgery. Dentistry also belongs to this category of services; (b) Rehabilitative-therapeutic tourism services, the main component of which are non-innovative treatments and rehabilitations that include health and wellness treatments carried out under the supervision of professional medical staff. In Europe, these services involve healing thermal and mineral waters, while hydrotherapy is not characteristic of American spas - the users are guests with health problems; (c) Spa and wellness services used by guests in good health, and the motivation for spa visits is to maintain mental, physical and spiritual well-being (Cross Spa, 2013). To simplify the analysis of spas that offer both traditional medical and rehabilitation services and contemporary health tourism services, we recommend a classification according to the facilities that provide these services, based on the modified classification by Smith and Puczko (2009) with a focus on "*health resorts, hospitals and clinics, ashrams, hotels and resorts, relaxation centers, cruise ships*" and practices and sa-

Table 1: Classification of contemporary health tourism services based on the facilities required for service provision

Object type	Type of service
Hospitals and clinics	<ul style="list-style-type: none"> • Diagnostic and follow-up examinations ECG, Ultrasound examinations, Cardiac hormone assessment, Laboratory analyses, Thermographic evaluation, General cardiovascular assessment, Computerized digital dermoscopy, Ophthalmological examinations and minor procedures (laser removal or correction of refractive errors), Fertility therapy and treatments • Metabolic balance treatments Fitness assessment, Obesity treatments • Alternative and complementary medicine Acupuncture, Ayurveda, Homeopathy, Naturopathy, Chinese or Oriental medicine, Chiropractic and osteopathic medicine, Electromagnetic therapy, Quantum (bioresonance) diagnostics and treatments, Bowen therapy • The advisory and educational component Advice on health and healthy living, stress management, heart and metabolic issues, healthy nutrition, physical activities, and more
Hotels and resorts	<ul style="list-style-type: none"> • Body treatments Various types of manual massages, Saunas, Turkish baths, Salt rooms, Beauty treatments, Sports and fitness services (exercises in centers with or without equipment, pool activities, outdoor exercises - walking, cycling, yoga, Tai chi, etc.) • Services related to mental health and spiritual development Psychological workshops and treatments (individual and group psychotherapy, coaching, etc.), meditation and relaxation rooms (tepidarium, etc.), workshops on topics related to mental and spiritual development, holistic approaches to life and health
Dental surgeries and salons for beauty treatments	<ul style="list-style-type: none"> • Dental tourism services Digital Panoramic Dental X-Ray – orthopantomography, Dental Implants, Tooth jewelry, Corrective jaw surgery, Gum treatment, crowns, sealants, etc. • Aesthetic medical and spa services Chemical peeling, Botox, Dermabrasion and microdermabrasion, Dermal fillers, Laser hair removal, Microblading, Microneedling, Permanent makeup, Sclerotherapy, Skin rejuvenation and resurfacing, Ultherapy, Vaginal rejuvenation (laser or radiofrequency), Vampire facelift, Scar and tattoo removal

Source: Based on Smith and Puzcko's (2009), revised and adjusted by authors

lons for specialized and professional services (dental, cosmetic, etc.).

The categorization of services described above is incomprehensible when one considers that it is possible to create different economic models to offer contemporary services in health tourism. For example, hotels can host specialized medical practices and facilitate collaboration between the public and private sectors. This collaboration would complement the existing spa medical services offered in specialized hospitals with modern aesthetic services provided by professional salons.

The ideal balance between costs and benefits must be found to achieve a strong competitive position in contemporary tourism. This is achieved by offering standardized services that are cost-effective but also allow for maximum customization to the individual user, thus maximizing the message benefit. The approach is based on identifying two main categories

of spa tourists based on their basic requirements. These are customers of wellness spas and health/medical spas. Spas can cater to the needs of both medical and wellness visitors. The former need medical help for specific conditions, while the latter want to maintain their current state of health. Understanding the requirements, behaviors, and methods of monitoring the different populations when selecting a spa could be crucial in developing an appropriate approach to operating facilities offering these services (Pelegrin-Borondo, Araújo-Vila & Fraiz-Brea, 2020).

3. METHODOLOGY

The study of visitors' perceptions of current health and wellness services was conducted by surveying Serbian citizens, focusing specifically on Belgrade and visitors of Sokobanja and Vrnjačka Banja. The selection of identified spas was determined by the share of

Table 2: Survey sample characteristics

Characteristics	Description	Share (%)
Gender	Female	62.2
	Male	37.8
Age	Less than 34	23.7
	35-44	31.2
	45-54	18.6
	55-64	15.8
	More than 65	10.7
Social status	Employed	56.5
	Self-employed	16.4
	Unemployed	2.8
	Student	7.9
	Pensioner	14.1
	Others	2.3
Monthly income (in EUR)	Less than 300	12.0
	300-600	28.0
	More than 600	52.6
	No answer	7.4
Number of visits	None	43.0
	1 visit	6.7
	2-5 visits	23.3
	More than 5 visits	23.0

Source: Authors

overnight stays in the total Serbian spa turnover - the participation rates for Sokobanja and Vrnjačka Banja in 2022 were 25.1% and 24.8%, respectively. Various causes have influenced the development of these spas, which are regarded as the cornerstone of the Republic Fund of Health Insurance and, since 2015, holiday vouchers.

A survey method was used to collect data, in which two different types of data collection were used. Firstly, a paper questionnaire was completed by most respondents in Belgrade, Vrnjačka Banja and Sokobanja. Secondly, an online questionnaire approach called CAWI (Computer-Assisted Web Interviewing) was used to capture citizens in the wider Serbian area. An online questionnaire was developed, and responses were collected using the Microsoft Office 365 application MS Forms. Data collection was conducted according to the following schedule: (a) data was collected using the paper questionnaire between June and September 2022, resulting in a total of 281 surveys, while (b) the online questionnaire, with the same content as paper-based, was used to collect data between May and September 2022, resulting in a total of 87 surveys. The total number of questionnaires collected before data cleaning is 368. Respondents were randomly selected, and the sample is considered representative due to the combination of different data

collection methods and the wide geographical distribution of respondents. In addition, the inclusion of various demographic groups (by gender, age, labor status, monthly income, and number of children in the household) confirms the representativeness of the Serbian population. This approach ensures reliability and allows the generalization of the results to the broader population, especially given the low variability within the sample.

In addition, the majority of respondents stated that they visit Vrnjačka Banja (28.5%), Sokobanja (15.4%), Banja Vrdnik (11.5%) and Banja Koviljača (10.3%). In contrast, none of the respondents have visited Vranjska Banja, Banja Rusanda, or Sijarinska Banja. Even though a small number of respondents (7%) stated that they had visited foreign spas in the last ten years, most of them had been to Hungarian (Mórahalom and Makó) and Slovenian spas (Laško and Olimia).

4. RESULTS

The following section presents the study's results on the habits and preferences of participants concerning contemporary health tourism services. The results are categorized by type of service. A tabular presentation of responses was chosen to comprehensively understand respondents' habits and preferences, including responses to questions about frequency of service use (regularly, as needed, or never). Respondents also indicated where they use the selected services, e.g., in Serbia, in spas abroad, in both or other places. The responses were first categorized according to the frequency of service use, distinguishing between respondents who use the service regularly or when needed and those who do not. The data can be used to determine whether the service is represented among the respondents. A further distinction was made among service users by identifying those who use the service in spas as opposed to those who use it in other settings (e.g., in specialized facilities, in residential facilities, or when traveling). The analysis provided valuable insights into the potential demand for services in spas, whether observed generally in-home spas or any location outside spas. It facilitates investigating whether demand can be diverted to spas or whether the service lacks market potential. The first column of the table shows the habits and preferences of respondents based on the characteristics given. It also compares the data of respondents who have visited a spa two or more times in the last ten years with those who have not. This approach provides valuable

Table 3: Distribution of spa guests in the case of health services

Use / Do not use	Location	Total	Frequently spa guests (2+)	Others
Diagnostic and follow-up examinations				
Use services (regularly or as needed)	In spas	86	62	10
	In Serbian spas	50	42	4
	Somewhere else	130	54	74
	No response	94	32	58
Total		310	148	142
Do not use services		44	18	22
Detox treatments				
Use services (regularly or as needed)	In spas	60	40	6
	In Serbian spas	26	24	0
	Somewhere else	86	34	50
	No response	52	14	40
Total		198	88	96
Do not use services		156	78	68
Physiotherapy treatments				
Use services (regularly or as needed)	In spas	96	68	14
	In Serbian spas	64	52	10
	Somewhere else	84	32	50
	No response	52	16	32
Total		232	116	96
Do not use services		122	50	68
Metabolic balancing and weight loss treatments				
Use services (regularly or as needed)	In spas	60	40	6
	In Serbian spas	28	28	0
	Somewhere else	110	48	60
	No response	42	14	26
Total		212	102	92
Do not use services		142	64	72
Dental services				
Use services (regularly or as needed)	In spas	46	26	6
	In Serbian spas	12	12	0
	Somewhere else	146	78	66
	No response	108	36	68
Total		300	140	140
Do not use services		54	26	24
TOTAL*		354	166	164

* For each service

Source: Authors

insights into the behavior and propensities of both previous spa-goers who have used the above services and potential customers who have not yet used spa services but could represent a potential market for these services. It is important to note that the survey design allowed for the exclusion of responses, which prevents a comparison of individual totals.

The results indicate a wide range of habits and preferences of the participants concerning health tourism services, whereby the utilization of services differs significantly depending on whether the respondents fre-

quently visit spas or not. Overall, there is a substantial demand for health-related services, even if the type of service and the location where it is utilized vary greatly.

Complete health checkups. A significant proportion of respondents undergo a full health check regularly or when needed, but a relatively small percentage do so in spas, particularly domestic ones. The moderate but underutilized demand for health checkups in spas highlights potential growth opportunities for attracting more customers to this service. *Detox treatments* are less frequently utilized compared to health

Table 4: Frequency of consumption of aesthetic treatments (% of respondents)

Type of treatment	Frequency		Location of use	
	Regularly	Occasionally	In spas	In Serbian spas
Chemical peeling	6.3	20.5	4.6	4.0
Botox	1.1	6.3	0.0	0.0
Hyaluron fillers	2.3	9.7	0.0	0.0
Microdermabrasion	0.6	8.0	0.6	0.6
Skin rejuvenation with TwinLight laser	0.0	1.7	0.0	0.0
Mesotherapy	1.1	17.1	0.6	0.0
Fractional laser for acne and acne scars	0.0	1.7	0.0	0.0
PRP plasma lifting (PRP blood plasma treatment)	0.0	5.7	0.0	0.0
Lifting of face and body	0.6	4.6	0.8	0.8
4D combo laser for stretch marks and skin tightening	0.0	0.6	0.0	0.0
Scar and tattoo removal	0.0	1.7	0.0	0.0

Source: Authors

checkups, with many respondents choosing to access these services outside of spas. This lower uptake in spas, particularly domestic spas, suggests a potential market that could be better tapped if the availability of detox services in spas were improved and promoted. *Physiotherapy* is a traditional service with a long history in Serbian spas and is highly utilized by respondents, especially those who visit spas frequently. However, many respondents prefer to use these services outside the spa. Despite this, the service is well positioned in spas, although it is still scoped to attract new users, particularly those seeking treatment elsewhere. *Metabolic balancing and weight loss treatments* have become increasingly popular due to changing lifestyles, but they are mainly used outside of spa resorts. The low uptake of these services in domestic spas, even among frequent spa visitors, indicates a significant opportunity for spas to develop and promote these services more effectively. *Dental services*, especially those that include traditional and aesthetic treatments, are frequently utilized by respondents but rarely in spas. The deficient uptake in domestic spas suggests this area has significant untapped potential. Developing dental tourism offerings could attract a new segment of spa visitors.

Table 4 shows the survey results concerning the respondents' habits and preferences for the selected aesthetic treatments. In this case, due to the small number of respondents who regularly use these services, we have refrained from presenting the frequency of responses in detail, as was the case with health services. However, the responses on aesthetic treatments show that while treatments such as chemical peeling and mesotherapy are relatively more frequently used occasionally by respondents, the regular use of such

treatments is low, with the frequency in spas in Serbia being even lower. In particular, more invasive procedures such as Botox, hyaluronic fillers, and advanced skincare technologies such as TwinLight laser skin rejuvenation and PRP plasma lifting are rarely utilized, indicating either a lack of demand or availability in Serbian spas.

Based on the combined analysis of the results presented in this document, several trends and findings can be observed regarding respondents' use of various spa and wellness services.

Thermal water pools continue to be one of the most popular spa services, and most respondents use them. More than half of these users visit local spas, especially those who regularly visit a spa. The strong preference for traditional spa services in a local context indicates the continued importance of thermal water treatments in Serbian spas. *Saunas and Turkish baths* are also heavily used, especially by frequent spa visitors. Many respondents utilize these services in spas, particularly domestic spas, reflecting their popularity as essential components of the spa experience. The data suggests that these services are well integrated into the offering of Serbian spas and meet the needs of regular spa-goers. *Manual massages*, which have enjoyed considerable commercial success in recent decades, are frequently utilized by respondents. A significant proportion of respondents use these services in spas, with frequent visitors showing an exceptionally high utilization level. The widespread use of massages in various settings - from spas to other locations - emphasizes the broad acceptance and demand for these treatments. However, there is still potential for spas to capture a larger share of this market by improving their massage offering. Although *aromatherapy* is rec-

Table 5: Distribution of spa guests in the case of wellness treatments and services

Use / Do not use	Location	Total	Frequently spa guests (2+)	Others
Immersion in thermal water pools				
Use services (regularly or as needed)	In spas	190	142	40
	In Serbian spas	126	96	26
	Somewhere else	42	6	36
	No response	14	2	10
Total		246	150	86
Do not use services		108	16	78
Relaxing in the sauna or Turkish bath				
Use services (regularly or as needed)	In spas	134	108	24
	In Serbian spas	80	68	12
	Somewhere else	48	10	36
	No response	16	2	10
Total		198	120	70
Do not use services		156	46	94
Manual massage treatments				
Use services (regularly or as needed)	In spas	126	100	24
	In Serbian spas	86	74	12
	Somewhere else	84	24	52
	No response	44	12	26
Total		254	136	102
Do not use services		100	30	62
Aroma therapy				
Use services (regularly or as needed)	In spas	56	50	6
	In Serbian spas	38	32	6
	Somewhere else	38	14	22
	No response	24	10	14
Total		118	74	42
Do not use services		236	92	122
TOTAL *		354	166	164

* For each service

Source: Authors

ognized as a holistic treatment option, it is used less frequently than other wellness treatments. The majority of respondents who use aromatherapy do so outside of spas. Even among regular spa visitors, the use of this service is relatively low. The benefits of aroma-

therapy need to be promoted and emphasized more, particularly in spa environments, to increase demand.

The use of physical exercises, recreation, and fitness facilities is predominantly outside traditional spa facilities, suggesting that spas are not necessarily the

Table 6: Distribution of spa guests in the case of fitness and spiritual development

Use / Do not use	Location	Total	Frequently spa guests (2+)	Others
Physical exercises, recreation, fitness				
Use services (regularly or as needed)	In spas	50	44	2
	In Serbian spas	34	30	2
	Somewhere else	162	78	76
	No response	64	12	46
Total		276	134	124
Do not use services		78	32	40

Source: Authors

Table 7: Frequency of use of fitness and spiritual development services (% of respondents)

Type of treatment	Frequency		Location of use	
	Regularly	Occasionally	In spas	In Serbian spas
Yoga classes	5.6	16.4	1.1	1.1
School of meditation and mindfulness	3.4	11.3	0.6	0.0
Spiritual and psychological workshops	9.0	15.8	0.6	0.6
School of Tai Chi technique	0.6	3.4	0.96	0.0

Source: Authors

first choice for these activities. Even frequent spa-goers often seek these services elsewhere, implying that spas should improve their offering in this category to attract more users. Although these services are utilized to some extent at spas, particularly by regular spa-goers, the general preference is for alternative facilities. This trend highlights the need for spas to rethink integrating and promoting fitness and leisure activities to better suit customer preferences and behaviors.

Table 7 shows a general trend towards occasional rather than regular use of wellness and spiritual services such as yoga classes, meditation and mindfulness, and spiritual workshops, suggesting that while interest exists, it may not be at the forefront of spa visitors' minds. Yoga classes, in particular, are most frequently used occasionally, indicating a wider acceptance among spa visitors. However, the relatively low uptake of these services in Serbian spas suggests

underutilization and indicates that spas have an opportunity to improve these offerings and promote them more aggressively to attract and retain guests. Creating dedicated spaces for these activities or incorporating them into spa packages could be a solution. The low engagement in spas, particularly for offerings such as Tai Chi, indicates either a lack of availability or insufficient marketing for these wellness modalities in the spa sector.

Alternative and complementary medicine includes various methods and therapies used alongside (complementary) or instead of (alternative) conventional medicine. These approaches are often based on traditional, natural, or holistic healing methods.

Respondents only use *Bioresonance* medicine to a limited extent, reflecting a significant gap in awareness and acceptance. *Acupuncture* is slightly better known but still underutilized, suggesting it could be

Table 8: Frequency of use of alternative and complementary medicine services (% of respondents)

Type of treatment	Frequency		Location of use	
	Regularly	Occasionally	In spas	In Serbian spas
Diagnostics and treatments of bioresonance medicine (quantum medicine)	5.6	12.7	1.9	0.8
Acupuncture treatments	0.0	21.4	14.7	3.4
Homeopathic consultations and therapy	3.4	15.8	10.4	1.7
Bowen therapy treatments	2.2	6.8	10.7	0.0

Source: Authors

Table 9: Distribution of spa guests in the case of chiropractic treatments

Use / Do not use	Location	Total	Frequently spa guests (2+)	Others
Chiropractic treatments				
Use services (regularly or as needed)	In spas	96	36	38
	In Serbian spas	14	14	0
	Somewhere else	8	6	2
	No response	40	12	18
Total		144	54	58
Do not use services		210	112	106
TOTAL		354	166	164

Source: Authors

expanded through better integration and promotion within the spa. *Homeopathic* consultations and therapies are only used to a limited extent, particularly outside spas, suggesting that spas have not yet established themselves as the primary provider of these services. *Bowen therapy* is scarcely recognized or used, highlighting the need for increased promotional activity to raise awareness of its benefits. These results show an excellent opportunity for spas to expand and improve their alternative and complementary medicine offerings to meet new health trends and customer interests.

Chiropractic is the only alternative and complementary service with relatively high recognition and utilization. Although it is still used by less than half of those surveyed, a significant proportion of users utilize chiropractic services at spas. Chiropractic appears to be more firmly established in the spa industry compared to other alternative and complementary services. However, utilization in domestic spas remains limited, indicating a potential growth area.

5. DISCUSSION AND CONCLUSIONS

Based on the results, we have systematized all the services analyzed and made general recommendations for improving their market position in domestic spas, presented in Table 10.

Based on the comprehensive findings presented in the study, Serbian spas are firmly rooted in their traditional role of using natural therapeutic resources. These findings are in line with previous research (Mišić & Bradić-Martinović, 2020) which showed that the services are still conventional, related to rehabilitation and diagnostics. Only a few leading spas introduce modern, non-invasive medical treatments that are becoming a source of competitive advantage. However, they face increasing demands for modernization to adapt to contemporary health and wellness tourism trends. While services such as thermal water pools and saunas remain popular, alternative and complementary services such as aromatherapy and acupuncture are underutilized, indicating significant potential for growth. The challenges of outdated infrastructure and inadequate marketing are highlighted, suggesting that substantial investment and strategic marketing efforts are crucial to revitalizing the spa sector.

With the goal of maximizing market potential and maintaining competitiveness on both the national and international levels, Serbian spas must diversify their offerings beyond traditional treatments by providing a broader range of wellness and prevention services that appeal to a more diverse clientele. This approach includes integrating contemporary medical treatments, wellness programs, and possibly aesthetic services, which could attract a new segment of health tourists. The research emphasizes the need for a collaborative approach involving both the public and private sectors to drive innovation, improve the quality of services, and effectively market these enriched offerings to a global audience. In summary, the future prosperity of Serbian spas depends on their ability to evolve and adapt to the changing dynamics of global health tourism so that they become not only centers of healing and relaxation but also centers of cutting-edge, holistic wellness. The incorporation of creative marketing tactics in the tourism sector is essential for adjusting to swiftly evolving customer tastes and augmenting the advantages of tourism destinations (Zlatanović, Dukanac & Erić Nielsen, 2024). Finally, Serbia has excellent conditions for spa and wellness tourism, but needs to develop a strategy to improve the quality of services and attract more visitors, as Berber, Gajić and Đorđević (2010) stated fifteen years ago, and which is still relevant.

The key limitations of the study are its geographic and demographic survey scope. The research examines spa tourist attitudes in Belgrade, Sokobanja, and Vrnjačka Banja, although may not comprehensively reflect other spa regions in Serbia. The combination of online and paper-based survey approaches enhances the study; nonetheless, self-reported data may add bias, as participants might reply in a socially desirable way or based on their most recent experiences instead of providing a thorough evaluation of their habits and preferences. This strategy is effective for rapidly obtaining substantial data, although it may constrain qualitative insights on the preferences and experiences of Serbian spa customers. Further research should focus on integrating modern technological advancements with traditional spa treatments to better cater to evolving consumer preferences. Additionally, exploring the impact of international health tourism trends on Serbian spa offerings could provide deeper insights into strategic improvements necessary for maintaining global competitiveness.

Table 10: The current state of demand for spa services and recommendations for improving the market position

Type of service	Current state	Strategies to enhance market position
Health services		
Diagnostic and follow-up examinations – T	The service has excellent market potential - it is already known in domestic spas, but not to a sufficient extent.	Spas need to be better positioned through service improvements and promotion.
Detox treatments – N	The service has moderate market potential and is recognized in domestic spas, but not to a sufficient extent.	Spas need to be better positioned through service improvements and promotion.
Physiotherapy treatments – T	Traditional spa service has excellent market potential and is recognized in domestic spas, but not to a sufficient extent.	Spas need to be better positioned through service improvements and promotion.
Metabolic balance treatments and weight reduction – N	The service is not recognized in domestic spas despite its moderate market potential.	Spas need to be better positioned by educating potential users improving service and promotion.
Dental services - N	The service is not recognized in domestic spas despite its vast market potential.	Spas need to be better positioned through service improvements and promotion.
Aesthetic treatments		
Chemical peeling - N	The service has moderate market potential but is not recognized in spas.	Spas need to be better positioned by educating potential users improving service and promotion.
Botox – N	The market potential of services is modest.	These services belong to the group of services for which there is a growing demand, particularly among the sections of the population with higher purchasing power. Spas have the possibility to position themselves through education and promotion.
Hyaluron fillers - N		
Microdermabrasion - N		
Skin rejuvenation with TwinLight laser – N		
Mesotherapy – N		
Fractal laser for acne and acne scars – N		
PRP plasma lifting (PRP blood plasma treatment) – N		
Lifting of face and body – N		
4D combo laser for stretch marks and skin tightening - N		
Scar and tattoo removal – N		
Wellness treatments		
Immersion in thermal water pools – T	Traditional spa services have significant market potential and are also acknowledged in domestic spas.	It is imperative to consistently enhance the quality of services and infrastructure and promote and educate potential customers.
Relaxing in the sauna or Turkish bath – T	Traditional spa services have significant market potential and are also acknowledged in domestic spas.	Service enhancement and promotion are necessary for spas to enhance their market position.
Manual massage treatments – T	Traditional spa services have significant market potential and are also acknowledged in domestic spas.	Service enhancement and promotion are necessary for spas to enhance their market position.
Aroma therapy – N	The service is not recognized in domestic spas despite its moderate market potential.	Spas need to be better positioned by educating potential users, improving service, and promoting.

Type of service	Current state	Strategies to enhance market position
Fitness and spiritual development		
Physical exercises, recreation, fitness - N	Traditional spa service has excellent market potential and is also recognized in domestic spas.	It is necessary to constantly improve the infrastructure and the quality of services, along with education and promotion.
Yoga classes – N	Services have a modest market potential.	They belong to the group of services for which there is a growing demand, especially among the more educated population. Spas have the opportunity to position themselves through education and promotion.
School of meditation and mindfulness - N		
Spiritual and psychological workshops – N		
School of Tai Chi technique – N		
Alternative and complementary medicine services		
Diagnosics and treatments of bioresonance medicine (quantum medicine) - N	Services have a modest market potential.	They belong to the group of services for which there is a growing demand, especially among the more educated population. Spas have the opportunity to position themselves through education and promotion.
Acupuncture treatments – N		
Homeopathic consultations and therapy – N		
Bowen therapy treatments – N		
Chiropractic treatments – N	Despite its moderate market potential, the service is not recognized in domestic spas.	Spas need to be better positioned by educating potential users improving services and promotion.

Note: T is for traditional spa services, N – new (contemporary) spa treatments and services

Source: Authors

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Apstrakt

Da li su srpske banje prepoznate kao centri savremenog zdravstvenog turizma – proučavanje percepcija domaćih gostiju

Tatjana Mišić, Aleksandra Bradić-Martinović

Rad procenjuje trenutno stanje i potencijal srpskih banja kao centara savremenog zdravstvenog turizma, fokusirajući se na percepcije i preferencije domaćih gostiju. Ispituje se kako su tradicionalne banjske usluge, kao što su termalni bazeni i saune, visoko cenjene, dok se savremeni velnes programi i alternativni tretmani manje koriste, ali pokazuju potencijal rasta. Istraživanje o percepciji zdravstvenih i velnes usluga sprovedeno je među građanima Srbije, posebno u Beogradu i većim banjama Sokobanji i Vrnjačkoj Banji, koje zajedno ostvaruju približno polovinu nacionalnog banjskog prometa. Podaci su prikupljeni korišćenjem papirnih upitnika i onlajn sistema (CAWI metodom),

akumulirajući ukupno 368 odgovora od juna do septembra 2022. godine. Dobijeni rezultati identifikuju značajne mogućnosti srpskih banja da prošire i diversifikuju svoju ponudu kako bi odgovorile na promenljive zahteve tržišta i naglašavaju potrebu za strateškim ulaganja u infrastrukturu, kvalitet usluga i marketing. Kroz sveobuhvatnu analizu, ovo istraživanje ima za cilj da informiše i usmeri srpske banje da se prilagode svetskim trendovima u zdravstvenom turizmu i obezbedi njihov održivi razvoj i konkurentnost.

Ključne reči: banje, Srbija, usluge, zdravstveni turizam, modernizacija, promocija

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