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**SLOVENIA AS A SPA, WELLNESS AND HEALTH
TOURISM DESTINATION FOR THE RUSSIAN MARKET**

Master thesis

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Recommendation for permission to defend thesis



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This Master thesis has been compiled independently. All works by other authors used while compiling the thesis as well as principles and data from literary and other sources have been referred to.

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INTRODUCTION

This thesis provides an overview of health, wellness and spa tourism destinations and considers the factors that make such destinations competitive and for which markets. The research focuses on a case study of Slovenia as a health tourism destinations and its main market – Russian tourists, including primary data on tourist satisfaction. Many of these elements of satisfaction are important in order to create a competitive health tourism destination.

After the collapse of the Soviet Union in 1991, the tourism industry received a completely new market from the Russian Federation citizens. After 26 years, this market is not yet fully described and understood as it is heterogeneous, complicated and characterized by specific phenomena of historical development.

It is a common knowledge that the Russian market is very desirable for most tourism destinations (Ageenko et al., 2013); this is why it is important to continue research on Russians leisure sociology, their motivations, needs and customer behavior in the field of tourism.

This master thesis topic could provide important information on Russians as spa, wellness and health tourists in Slovenia, which may result in better control of the market, its satisfaction and growth or any other strategies.

To maintain and develop the Russian market, it must be better understood. Thus, the problem of this study is exploring the competitiveness of Slovenia as a spa, wellness and health destination for the Russian market.

The main research question is whether Russian tourists find Slovenia as a satisfactory and competitive spa, wellness and health tourism destination with still unreleased potential and possibility to gain a bigger percentage of the Russian market.

The formulation of the thesis aims:

- 1) to provide an overview of Slovenia as a competitive tourism destination;
- 2) to present health, wellness and spa tourism in Slovenia;
- 3) to do research on Slovenia's competitiveness as a spa, wellness and health destination for the Russian market.

On the assumption of the thesis aims, the research tasks are:

- 1) review and analysis of thematic literature;
- 2) preparation and conduction of research and analysis of the research results;
- 3) presentation of recommendations based on the research.

Research methods used are secondary data collection and analysis and primary data in the form of a questionnaire.

This master thesis consists of three chapters. The first and second chapters form the theoretical part of the paper, which provides an overview of Slovenia as a competitive tourism destination and health, wellness and spa tourism in Slovenia. The third chapter is the research part of the master thesis, which presents an analysis of the Russian health, wellness and spa tourism market in Slovenia and the demand research: questionnaire results of Russian spa, wellness and health guests' visit to Slovenia.

1. HEALTH, WELLNESS AND SPA TOURISM

1.1 Health and wellness tourism destinations

This chapter is devoted to health, wellness and spa tourism definitions, wellness concepts, modern trends in the field, wellness tourism destinations, their management and competitiveness.

Recently health, medical and wellness tourism has grown significantly (Smith & Puczkó, 2009, 2013; Voigt and & Pforr, 2013). This growth happened to spas, spa and wellness hotels, thermal springs, hospitals, clinics, holistic retreats etc.

Moreover, wellness tourism is becoming generally known, which allows forecasting, that it may become a megatrend: a trend that affects the lives of the human population worldwide (Global Wellness Institute, 2014).

At the same time, thus far, there are confusions over the definitions of terms, which creates a problem in researching and quantifying the health/medical/wellness/spa tourism sectors.

Some authors differentiate health tourism from wellness and medical tourism by seeing it as an umbrella term (Smith & Puczkó, 2009). However, health and medical tourism are still often used as synonyms by many governments (Global Spa Summit, 2011).

Wellness is quite frequently defined by contradictions. For example, Henderson (2004) opposes traveling for reasons of wellness to traveling for reasons of illness, where the first case concerns visits to beauty spas, for instance, and the second case applies to health examinations. Thereby, wellness is associated with prevention, lifestyle and self-responsibility, while medical industry is connected to curing.

Smith and Puczko (2013, p. 25) define wellness tourism as «Trips aiming at a state of health where the main domains of wellness are harmonised or balanced (e.g. physical, mental, psychological, social). There is an emphasis on prevention rather than cure, but some medical treatments may be used in addition to lifestyle-based therapies».

Wellness tourism popularity and attractiveness are perhaps justified by its aims. In the 21st century, when the life of many people is complex, fast-paced and stressful, wellness solutions are required. Wellness is often described as a holistic term, which works with the body, the mind and the spirit (Smith & Kelly, 2006).

Some of the solutions the industry may offer are improved spiritual, physical and mental health, social harmony, intellectual development, environmental sensitivity, occupational satisfaction and emotional well-being (Müller & Kaufmann, 2001).

Many wellness concepts are developed from nature and its resources (e.g. Nordic wellness, Alpine wellness, Forest wellness and Lake wellness).

Nordic wellness stems from a healthy lifestyle right next to healing Nordic nature and high quality of services in not densely populated surroundings (Konu, Tuohino, & Björk, 2013).

Alpine wellness appeals to a unique mountain ecosystem experience, where an individual has sport activities, pampering, uses natural remedies etc. (Pechlaner & Fischer, 2006).

Forest wellness or therapy covers relaxation activities in a forest environment, which leads to active recreation (Konu, 2015).

Lake wellness leads to positive influence on body and sensory perceptions, bonding between an individual and water, and cognition of the nature and him or herself (Konu, Tuohino, & Komppula, 2010).

The health tourism destination that is presented later in the thesis – Slovenia – is a country that can potentially offer all of these forms of wellness, as it has not only seaside, but lakes, mountains and forests too. Like many other Central and Eastern

European countries, there is a tradition of healing thermal waters, but there are also many modern wellness hotels and spas too.

There are several modern trends in the field of wellness worth mentioning. Firstly, the most popular treatments have been the same for many years: massages, body and face treatments and water-based activities, though international tourists show a growing interest in ancient rituals, natural resources and therapies, in other words, they start to be motivated by local traditions.

Secondly, nowadays, the wellness offer is often combined in the package with a conference, a wedding or a cultural trip (Smith & Puczkó, 2015). The green trend seems to be also very important for tourists, who require ecological, organic and energy saving services. The destination image grows, when investments in sustainability and nature preservation are granted (Kirigs, 2013).

In WelDest research, a health and well-being destination is defined as: «a health and well-being destination is an area chosen by customers (guests, with either preventive or curative motives) as a travel destination to improve their state of health and/ or well-being. The destination includes necessary infrastructure and services such as accommodation, restaurants, and other facilities, with a systematically developed offer for health and well-being. The destination is managed and marketed professionally as a unit» (Illing et al., 2014, p. 22).

According to Voigt and Pforr (2014), wellness tourism destination differs from any other tourism destination in core resources and competencies:

1. Natural resources (e.g. thermal and/or mineral waters, landscapes, plants etc., which can be used for an enhancement of mental and physical well-being)
2. Cultural, historical and spiritual resources (e.g. well-being heritage sights like Roman Thermae, spiritual practices like yoga)
3. Complementary and alternative medicine offerings (e.g. meditation, balneology, homeopathy etc.)
4. Community mind set and wellness-related lifestyle (e.g. local community with health-related lifestyles)

5. Human resources and competencies (professional staff to deliver quality wellness services)
6. Wellness-specific superstructure (e.g. spa/wellness hotels, spiritual retreats, thermal springs etc.)
7. Wellness-related events (e.g. community health event)
8. Crossover of wellness with other activities/offerings (e.g. wellness services in a package with local culinary).

Saari and Tuominen (2014) designed the model named «Developing a health and well-being tourism destination». The authors attempted to unite all the elements of health and well-being tourism destination as well as the environment it exists in. The following components were analyzed: endowed resources and quality services, supporting services, staff, development areas, destination management, destination development and macro environment.

Endowed resources and quality services together is a core product of a destination. Endowed resources are nature, natural assets, attractive scenery and environment, authenticity, reputation of the destination. Listed resources are also called core pull factors. They create the comparative advantage for the destination and thus basis for its competitiveness. Quality services enhancing health and well-being include wellness and medical treatments, sauna and pool facilities, outdoor and indoor sports and possibilities to get mentally refreshed. The wide supply of the services adds value to the destination.

Supporting services are quality accommodation, restaurant and transportation services and other supporting services. Named services belong to standard tourism services and are not the motivation factor for tourists to choose a health and well-being destination.

Staff plays a crucial role in customers` satisfaction. Personnel is expected to possess hospitality, social and professional skills. Especially, it is important for the health and wellness industry as there are high-contact services and guidance in personal well-being needs.

Success in a competitive environment depends on following development areas: sustainable development, hospitality and customer orientation. Sustainable development

covers three dimensions, which are socio-cultural (development of the society), ecological (protection of the environment for future generation) and economic (permanent basis for economic prosperity). Local population is vital in creating hospitable atmosphere in the destination. Customer orientation means understanding and meeting customer expectations.

In the model destination management and destination development are linked, in this way the authors wanted to emphasize the importance of the cooperation of all actors responsible for destination development, management, service offerings and policy making. They also insist that utilization of research should be on both destination management and development levels, as well as vision and values should be created collaboratively. The cooperation contributes to maintaining, developing and communicating the competitive advantage (assets, services, competences).

Destination management concerns organization for destination management and public-private network leadership, understanding health and well-being tourism concepts and demand, operational activities, evaluation of the level of quality and improvement.

Destination development covers systematic participatory strategic destination planning, brand identity development and management, destination level planning and policy making supporting health and well-being tourism as well as health promotion, continuous evaluation and development of infrastructure and service offerings. The primary research that is presented later in this thesis focuses in particular on (Russian) tourists' experience and perceptions of the infrastructure and service offerings for health tourism in Slovenia.

Macro environment represents external factors as society, economy, politics, ecology and technology that influence on the success of the destination.

This chapter covered the following topics: health, wellness and spa tourism definitions, wellness concepts, modern trends in the field, wellness tourism destinations, their management and competitiveness.

2. DESTINATION COMPETITIVENESS

2.1 Slovenia as a competitive health tourism destination

The second chapter provides an overview of Slovenia as a destination, a competitive destination and a health and wellness tourism destination. It covers some research on its competitiveness, country branding, self-identification and strategic flexibility. There is information on health, wellness and spa tourism development in Slovenia, types of Slovenian health, wellness and spa resorts, core areas of modern tourist offer and foreign tourists' impressions about their stay in Slovenia.

Slovenia is a state in southern Central Europe, which covers 20 273 square kilometers. It is bordered by Italy (west), Austria (north), Hungary (northeast) and Croatia (south). The population of Slovenia totals around 2 million people. Since the year of 2004, the country is a member of the European Union. According to the World Happiness Report of 2015, Slovenia takes the 1st place among the Balkan countries (Helliwell et al., 2015).

Despite the small territory, the nature resources of the country are very diverse. Slovenia is the only European country, which connects the Alps, the Pannonian Plane and the Mediterranean in a manageable distance. More than half of the country is covered by forest. More than a third part of Slovenia is in Natura 2000, an EU-wide network of special protection areas. In terms of biodiversity, Slovenia is one of the richest countries in Europe with 22 000 animal and plant species. Slovenia owns 28 000 kilometers of rivers and streams and around 1 300 lakes. Its Adriatic coastline stretches for approximately 43 km (Spirit Slovenia, 2015).

Reviewing the country's statistical data, it is possible to conclude, that tourism is very important for the Slovenian national economy (Lorber, 2006). According to the estimate

of the World Tourism and Travel Council, nowadays tourism in Slovenia creates as much as 13% of GDP. Its travel exports value in 2015 was a bit more than 2.2 billion EUR, which is the highest value for the country in absolute terms. Furthermore, Slovenia is ranked in top category «very high global peace index» (15th place out of 162 countries) (Slovenian Tourist Board, 2015).

In 2015, Slovenia recorded 10 016 494 overnight stays for the first time. It is mostly visited by Italians (share between international tourists – 16%), Austrians (12%), Germans (11%) and Russians (5%). These four nationalities cover almost 50% of foreign tourist market in Slovenia (Statistical Office of the Republic of Slovenia, 2012).

Slovenia is a tourism destination. There are several approaches how to define tourism destinations: geographical and non-geographical concept.

Bieger (2000) states that a tourism destination is a geographic area (can be represented as continent, country, region or community) that was selected as a travel tourism destination by the respective visitor. It includes necessary compounds for a stay such as catering and accommodation, entertainment and activities.

Mathieson and Wall (1996) offer similar definition: a tourism place must possess some characteristics known to a sufficient amount of potential tourists, which would influence their positive choice for this location, not any other.

Keller (1998), continuing the topic of characteristics, writes about natural and man-made attractions, which are the reasons for tourists to visit a travel destination. Some of the attractions existed prior to tourism and some were created for the sake of it.

Gunn (1994) mentions that a geographic area contains critical development mass needed to satisfy visitors' objectives.

Provided above definitions include not only geographical core, but authors always take into consideration the participants (named guests, visitors, tourists), without whose appreciation a geographical zone cannot become a tourism destination. It is also unlikely that the tourism industry will develop if one of these elements (attractions, service

activities, transport system) is missing. Even more, the elements must attain harmony and consistent quality.

Applying the non-geographical definition of Konecnik (2005), Slovenia as a tourism destination is a complex entity, consisting of different experiences, services and products. It is managed by stakeholders (locals, tourism industry and public sector, government etc.) and is characterized by different ownership forms. It may be perceived from the tourists', locals' and managers' perspectives. Thus, the non-geographical concept in comparison with geographical is based on tourism participants and their perception of it.

European Commission provides a recent definition of a tourism destination, which is a summation of previously described definitions (Illing et al., 2014):

1. A geographic area that is attractive to tourists
2. An area which is recognized as a tourism destination and offers facilities and products for tourism purposes
3. An area which is promoted as a tourism destination
4. An area with measurable supply and demand for tourism services
5. An area where public and private sector stakeholders and local community participate in the visitor management.

Some of the tourism destination's definitions slightly touched the topic of one destination having advantages over others, in other words destinations' competitiveness.

From a macro prospective, competitiveness is the governmental domain with the purpose of increasing citizens' welfare. It includes such variables as economic, cultural and social, which affect the performance of the country at international level. From a micro perspective, competitiveness is the companies' domain. In order to be competitive each company has to offer services and products, which customers are willing to acquire (Gomezelj Omerzel, 2011).

Definitions of competitiveness depend on the level (company, industry or country level) at which competitiveness is measured. Basically, competitiveness hails from the intention to be more successful than others. To be competitive means to have survival abilities despite the conflicts of interest and external factors.

Slovenia's competitiveness is naturally measured at county level. Hassan (2000) defines country's competitiveness as the ability to develop products and services, ending them with high added value, sustain country's resources and maintain the market position.

Ritchie and Crouch (2003) consider competitiveness from the other perspective such as the increasing of consumption, i.e. attracting ever-greater numbers of guests by offering unforgettable experiences and satisfying them.

There are three possible levels of country's competitiveness, depending on its market performance. The lowest level – ability to survive. It is a passive adaptation to the environment. The middle level – ability to develop. In this case, improved quality affects the environment. The highest level – ability to be superior. Superiority here means developing faster and more efficiently than the others do (Gomezelj Omerzel, 2011).

Researches on country's competitiveness may be undertaken with interviewees from supply or receiver side. Some of them are comparative researches, when countries are compared to each other by some parameters. Many researches were undertaken in order to measure the competitiveness of Slovenia as a tourism destination. One of them classified questioned Slovenian tourism stakeholders on the supply side into four groups (Gomezelj Omerzel, 2011):

1. The biggest group of 56 units «moderate negativists». Believe that Slovenia is just below the average of the competitive countries in all areas, the most criticized variable was management.
2. The second largest group of 38 units «moderate positivists». Most critical of Slovenian competitiveness in the area of supporting factors and least critical in the area of management.
3. The third group of 20 units «negativists». Share the opinion that Slovenia as a tourism destination is way below the average of the competition countries in all areas. Created sources were the most criticized variable.
4. The last group of 4 units «positivists». Respondents from this group believe that Slovenia is high above the average of the competition. They were least critical for management and most critical for inherited resources.

This research proves that Slovenian stakeholders do not perceive Slovenia as a highly competitive destination; moreover, most of the interviewed believe it is below the average of the competitive countries in all areas or even way below the average.

Slovenia is a relatively new European tourism destination, which had to transit from socialism to market economy, perhaps this was the reason of many issues with its competitiveness. Gomezelj Omerzel and Mihalič (2008) argue that Slovenian tourism stakeholders' inadequate actions result in a gap between tourists' preferences and destination products. Assaf and Knežević Cvelbar (2011) claim that the Slovenian domestic market has low competitiveness and, in general, the tourism industry is not internationally orientated. Sibila Lebe et al. (2009) affirms that there is a skill shortage of managers, due to the absence of educational programs and low salaries.

Travel and Tourism Competitiveness Index proves that Slovenia overall doesn't perform very well. In 2015, it was ranked 39th out of 141 countries, what is the second worst result since 2007. The biggest upgrade happened in the category of Natural Resources and the biggest decrease in the category of Cultural Resources and Business Travel (Slovenian Tourist Board, 2015).

Some campaigns were launched towards improvement of the negative situation. At the beginning of the new millennium, the brand concept grew to the level of the country as a tourism destination. Slovenian tourism industry participants applied country branding in order to increase Slovenia's international recognition, become competitive, sustainable and maintain a long-term position on the market.

Systematic country brand building could significantly contribute to the recognition of Slovenia for its target groups. Previous three brand development attempts (from 1986 – to 2007) were not very prosperous as focus was concentrated on logo and slogan, while a story and strategic planning were missing (Konecnik Ruzzier, 2012). Without appropriate methods, visual elements and story, the brand did not communicate to the customers, and they were not able to create an emotional connection with the brand of Slovenia.

«The most powerful country brands in the world have at least three characteristics in common: they have a long history, their economy and standard of living is very high, and

all of them have a stable political environment» (Konecnik Ruzzier, 2012, p. 130). Judging by these three characteristics Slovenia as a destination has good opportunity to promote itself successfully, though high level of competitiveness cannot be reached solely with one element as branding.

Today, Slovenia presents itself to tourists as «I FEEL SLOVENIA» brand, which includes unspoilt nature offer, green and sustainable tourism promise (Spirit Slovenia, 2013). «I FEEL SLOVENIA» brand has a holistic nature, since key stakeholders and representatives from relevant areas affected and co-created Slovenia's identity.

Slovenia's branding campaign message originates from self-identification research of opinion leaders (Konecnik Ruzzier, 2012). The respondents designated distinctive features of Slovenia: unique mix of Romance, German, Slavic cultures, diversity of landscape and climate despite the small territory of the country (the Alps, the Mediterranean, the Panonnian Plain) and beautiful, unspoiled nature; and similarities: Slovenians' lifestyle is resembling the lifestyle of other Europeans. Among the known key products were Slovenia health, wellness and spa resorts.

As a result of the study, the propositions for vision and mission as identity elements were made. «Vision should be centred on innovativeness with great respect for sustaining nature, and aims at exploiting innovation by seeking global niches through boutique entrepreneurship» and «Mission should be closely link to the natural environment, whose quality should be preserved for present and future generations» (Konecnik Ruzzier, 2012, p. 137).

Tourism is a constantly changing industry, which affects country's market orientation and competitive advantage. Uncertainty for tourism organizations grows, especially in times of globalization process, rapid technological development, shortening of product life circle and intense competition.

Stakeholders have to have clear understanding of the change directions and implement destination management. If a tourism organization uses strategy, which moves away from addressing the forces in the external environment, strategic drift will occur. Involvement

of «strategic flexibility» can help to avoid it. In a turbulent environment, the Slovenian tourism industry has to be strategically flexible in order to fulfill its potential.

«Strategic flexibility is predominantly conceptualized as an ability or set of abilities of a firm to react or respond proactively to changes or opportunities in the environment» (Dwyer et al., 2014, p. 378). Thus, «strategic flexibility» with its main drivers (development of core competences, product development, improved customer focus, fostering innovations, stronger networking, improving risk management and promoting sustainable development) can help in achieving competitive advantage.

Importance-Performance analysis is an instrument, which may be used to assess «strategic flexibility». IP analysis for Slovenia by industry stakeholders showed the following results (Dwyer et al., 2014):

1. Keep up the good work - product development, stronger networking, and fostering innovation;
2. Concentrate here - promoting sustainable development, development of core competencies;
3. Low priority - improving risk management;
4. Possible overkill - improved customer focus.

This IP analysis indicates that there is successful work in product development, networking and innovation field, what must be maintained. Immediate actions are needed for sustainable development and development of core competencies. Alertness is required for customer focus. Risk management is not in priority, though should not be forgotten.

Some researchers try to measure the competitiveness of Slovenia by comparing it with similar destinations. For example, one of them compares the Slovenian seaside resort Portorož with Opatija seaside resort in Croatia. The general hypothesis of the research was confirmed by respective group of respondents and proved following: overall Portorož is more competitive, than Opatija. Portorož leaded in the fields of Transport, Secondary offer, Tourism enterprises, Macro tourism environment, Macro environment, Destination image and conceded in the fields of Hospitality, Primary offer, Tourist services and Other infrastructure (Uran Maravić et al., 2015).

Tourism represents an interaction between tourist offer and tourist demand. Successful interaction contributes to the GDP growth, employment rate and etc. It can be done, when a marketing strategy, concerning tourist products, their promotion and target markets, is developed.

«The absence of a comprehensive marketing strategy in tourism is, actually, the basis of the negative trends in tourism development. There is a need to create a generic framework that will enclose all the parameters that are essential for creating a complete marketing strategy in tourism» (Pike, 2004, p. 311). According to the latest marketing concept, one of these essential parameters is to study target markets' needs and preferences and in total customers' behavior.

There are many self-identification researches, IP analysis and competitiveness researches from the supply side of Slovenia, while the demand side is less explored. Creating country's competences, brand, marketing, management and innovation strategies, it is crucial not to address only local stakeholders, but also consumers' needs and preferences as well as analyzing their satisfaction with the services they have already experienced. Improved customer focus is one of the drivers in achieving competitive advantage. This is what the Russian market research provided in this paper is attempting to do.

Having several regions with short distances between, Slovenia is quite naturally and culturally diverse. Conditionally, there are four major tourist areas: the main towns (capital Ljubljana, for example), the Alpine region (mountains), the Sub-Mediterranean region (seashore), the Eastern Slovenia (health resorts and spas).

Mentioned above confusions over the definitions of wellness and health terms come from historic, linguistic, regional and cultural differences in understanding health and wellness. Previously, the typical focus in Slovenia was curative rather than preventative healthcare, therapy and rehabilitation for the body, medical tourism and water-based leisure centers. The government supported the development and upgrade of the traditional medical resorts with investments. Meanwhile, nowadays Slovenia has moved towards wellness away from medical spas, especially on the coast (Smith & Puczkó, 2009).

At the beginning of 19th century, the territory of present day Slovenia was familiar with several forms of tourism: pilgrimage, visits to Karst phenomena and mineral or thermal resorts. The construction of the railway between Vienna and Trieste contribute to the development of tourism. Health resorts are the oldest type of resorts in Slovenia. They were constructed around the thermal or mineral springs, mostly in the east of the country. Rogaška Slatina spa, the world known health spa, reckons 400 years of experience and tradition. The waters' magnesium content made it unique for Europe (Horvat, 2010).

The First World War and The Second World War suspended tourists' visits. After the Second World War, the area of spas was expanded as new springs were made using geologic drill technique. The new stage of development began in the early 1960s, when the state resolved modernization and construction of tourist facilities, including transport infrastructure. Tourism development policy succeed to bring Slovenia among important international tourist destination. The majority of foreign tourists were Austrians, Germans and Italians, what is similar to nowadays situation (Horvat, 2010).

Primarily, health and spa resorts referred to social tourism, and only after 1960 became a part of international tourist offer as medical rehabilitation centers, which combined natural remedies and modern medical treatments. In 1991, the country became an independent state, but experienced the worst period in modern tourism history ever (dramatic drop in the number of foreign tourists), caused by the war on the Balkans (Horvat, 2010).

The 1990s also brought a turnabout in the health resorts industry. Modern in-door and out-door swimming pools allowed the usage of thermal waters for fun. These places were called «thermal parks» or «thermal rivieras». From medical orientation, the industry turned to recreation, healthy lifestyle and wellness. After the year 2000, when political situation stabilized, the industry revived again with new strategy and development paradigm. New course intended to develop new products of high quality, which are able to compete in the market. It was proposed to work with market niches in the frame of European tourist offer instead of mass tourism. Health, wellness and spa tourism were chosen as some of them (Horvat, 2010).

Spa and wellness centers participation is currently growing, as many consumers visit these places to improve their well-being and even health (McNeil & Ragins, 2005). It also became a luxury experience and a necessity at the same time, considering personal space offer, time out, escapism and etc. The quality of wellness services is a criterion by which tourists select a hotel. Different motivations are also characteristic for spa and wellness centers visitors (Rančić et al., 2014).

Nowadays, two types of health and spa resorts have developed in Slovenia (Horvat, 2010):

1. «Multifunctional» urban centers (ex. Rogaška Slatina, Radenci, Laško). The older resorts, dating back to 19th century, experienced the economic development, thanks to health tourism, which attracted population with work posts, thus agrarian settlements grew to «multifunctional» urban centers. The first non-agrarian activity there was tourism, and then industry and services activities followed. Better infrastructure of such tourist places disposed the decision to expand residential areas around them. Consequently, most of «multifunctional» tourist centers gradually grow into urban settlements, having the combination of central functions and less developed agrarian surroundings. Among the disadvantages of such evolution phenomena, could be mentioned: ecological problems, preservation of cultural landscape, conflict of interests, since the area has not only tourism job offers, it may result in lack of willingness among the local population to have a career in tourism field.
2. «Monostructured» tourist health resorts (ex. Terme Olimia, Čateške Toplice, Moravske Toplice). The situation with «monostructured» tourist health resorts is quite the opposite. They are situated in small settlements, which economy strongly depends on tourist turnover. They are very sensitive to tourist flows and tourist demand. «Monostructured» tourist places offer limited employment choices to their residents.

The health resorts and spas' existence and development are crucial for Slovenia, especially for the less developed areas of the country. Being rural, some areas receive additional employment opportunities, spatial and functional progress with the construction of spa, wellness or health facilities.

It is possible to conclude that «multifunctional» urban centers and especially «monostructured» tourist health resorts are influenced by various trends creating tourist

demand. For both places, is necessary to research guests' demand, in this way the Russian market research is very topical.

Nowadays, core areas of the tourist offer are health and well-being. Spa and wellness products of Slovenia include landscapes and nature, good climate, outdoor activities, healthy food and wines, natural and herbal remedies, thalassotherapy, balneology and medical professionals.

Slovenian spas are situated in different regions and combine nature, hundred years of healing experience and modern medical approach.

As a spa and health destination Slovenia is rich with 87 natural mineral and thermal water springs. It can offer 15 certified natural spas (Čatež Thermal Spa, Dobrna Thermal Spa, Dolenjske Toplice Thermal Spa, Thermana Laško, Lendava Thermal Spa, Terme 3000, Olimia Thermal Spa, LifeClass Hotels and Spa, Ptuj Thermal Spa, Radenci Health Resort, Rogaška Health Resort, Talaso Strunjan, Šmarješke Toplice Thermal Spa, Topolšica Thermal Spa, Zreče Thermal Spa) spreading from the coast of the Adriatic Sea to the Pannonian Plane. Slovenia is also famous for world-renowned mineral drinking waters, which are used for health therapies as well (Spirit Slovenia, 2013).

In the period July-August of the year 2012, Statistical Office of the Republic of Slovenia conducted a survey, asking foreign tourists to estimate their impressions about staying in Slovenia (from 1 - very bad; to 5 - excellent). The results are presented in the Table 2.1.1.

Table 2.1.1. Foreign tourists' impressions about staying in Slovenia (July-August 2012)

Field of estimation	Mark (1 - very bad; 5 - excellent)
Natural environment	4.5
Personal safety during the stay	4.4
General impression of Slovenia	4.3
Hospitality of local people	4.3
Opportunities for resting and relaxation	4.2
Local food and drinks	4.0
Communication with the local population	4.0
Quality of services in hotels and restaurants	4.0
Offer of recreational activities	3.9
Quality of wellness services	3.9

Table 2.1.1. continued

Field of estimation	Mark (1 - very bad; 5 - excellent)
Availability of tourist information	3.9
Other	3.9
Variety of fun and entertainment	3.7
Quality of congress facilities, services	3.7
Quality of roads and roadside services	3.7
Price to quality ratio	3.7
Offer of cultural events	3.5

Source: Statistical Office of the Republic of Slovenia, 2012

In accordance with the Table 2.1.1. foreign tourists were mostly satisfied with their visits to Slovenia (mark - 4.3). Especially they were impressed by nature (4.5) and personal safety during the stay (4.4), hospitality (4.3) and opportunities for rest and relaxation (4.2). «Quality of wellness services» was mentioned as a separate field of estimation and gained quite a satisfactory mark (3.9), although it, obviously, worth striving for more.

For the enhancement of the results, the study of tourists' motivations, behavior and needs should be undertaken by the tourism providers. This way they will gain an opportunity of attracting tourists to a particular destination and satisfying them with appropriate services, what ends in raising competitiveness of the destination.

Wellness and spa tourism is still at its infant stage, what makes health and spa tourists' needs and motivations interesting for researchers. There is lack of empirical studies on this topic (Rančić et al., 2014). Thus, the following research may be particularly beneficial.

This chapter gave information on previous research on Slovenia competitiveness, country branding, self-identification and strategic flexibility, health, wellness and spa tourism development in Slovenia, types of Slovenian health, wellness and spa resorts, core areas of modern tourist offer and foreign tourists' impressions about their stay in Slovenia. The following chapter focuses in particular on one major foreign market and that is Russian tourists. Understanding their profiles and motivations can help us to understand why they choose Slovenia as a tourism destination for health tourism, what satisfies them in terms

of experiences and facilities, and what could be improved in order to make Slovenia even more competitive compared to other health tourism destinations.

3. THE RUSSIAN MARKET

3.1 The Russian market for Slovenian health tourism

In this subchapter, Russian Federation citizens' travelling abroad statistics is presented. At first statistical data concerns the whole world scale, later narrowing to EU and finally reaching the subject of Slovenia. Marketing segmentation of Russian consumers and modern trends are slightly covered as well.

Russian Federal Tourism Agency provides information about top six tourism destinations for Russians in 2013, 2014 and their performance changes (e.g. see Table 3.1.1.). China (4th place) is in the list being one of the closest neighbors for northern part of the country and a great shopping destination. Other countries offer good climate, cheap seaside holidays and likely all-inclusive services, what Russians normally search for.

Table 3.1.1. Top six tourism destinations for Russians in 2013 and 2014 and their performance changes

Country	2013	2014	Performance changes
Turkey	3 078 563	3 278 405	+6%
Egypt	1 909 240	2 565 726	+34%
Greece	1 175 629	1 016 083	-14%
China	1 067 542	766 306	-28%
Thailand	1 034 977	933 759	-10%
Spain	1 012 811	982 256	-3%

Source: Федеральное агентство по туризму, 2014

Russian Federal Tourism Agency also posts information about the amount of Russian citizens' travels to European Union countries with the purpose of tourism. Figure 3.1.1. shows some of popular EU destinations, which are neighbor countries of Slovenia. Slovenia itself does not present in this list of the most popular EU destinations for Russian tourists.

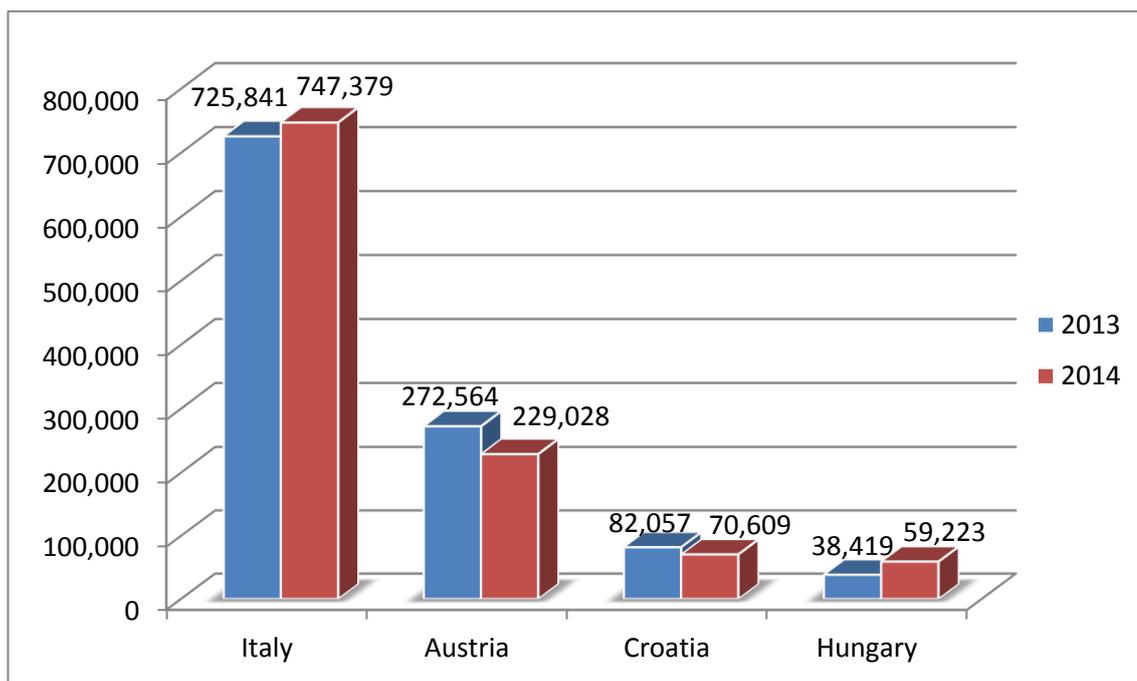


Figure 3.1.1. Number of Russian citizens travelled to some EU countries (Slovenia neighbors) with the purpose of tourism in 2013 and 2014 (Федеральное агентство по туризму, 2014)

According to the Slovenian Tourist Board, a number of Russian tourists' arrivals grows almost every year (e.g. see Figure 3.1.2.). In 2005, the amount of visits was 16 310, meanwhile in 2014 it had increased by three times and counted 56 156. Crisis years 2008-2009 and 2013-2014 provoked small decrease in arrivals as some percentage of Russians preferred not to spend on travelling.

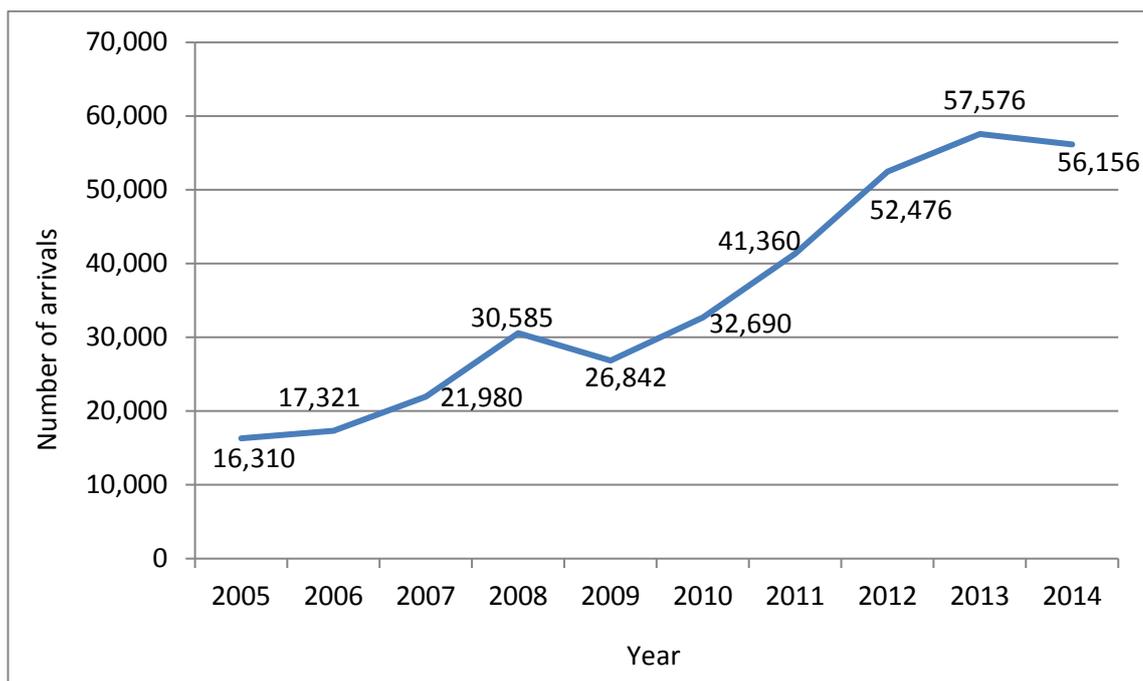


Figure 3.1.2. Number of arrivals generated by Russian tourists in Slovenia 2005-2014 (Slovenian Tourist Board, 2014)

Figure 3.1.3. indicates that the average length of stay of Russians in Slovenia also decreases while crisis by the reason of saving on holidays. During the most favorable year 2012, the average stay of Russian tourists counted 6.68 days. However, in 2014 the length of stay had dropped to 5.67 days and almost equaled 2008 crisis year's drop (5.43 days).

“The dead season” for Russian tourists in Slovenia is February, while the most visited months are June, July and August, when the majority of Russian citizens have holidays.

Concerning shares of overnight stays of Russian tourists in Slovenia in 2014 by types of accommodation facilities, absolute majority, what is 87.6 % goes to hotels, only 5.4% to private accommodations as rented rooms and dwellings, 2.4 % to apartment settlements and 4.6% to other accommodation facilities (Slovenian Tourist Board, 2014).

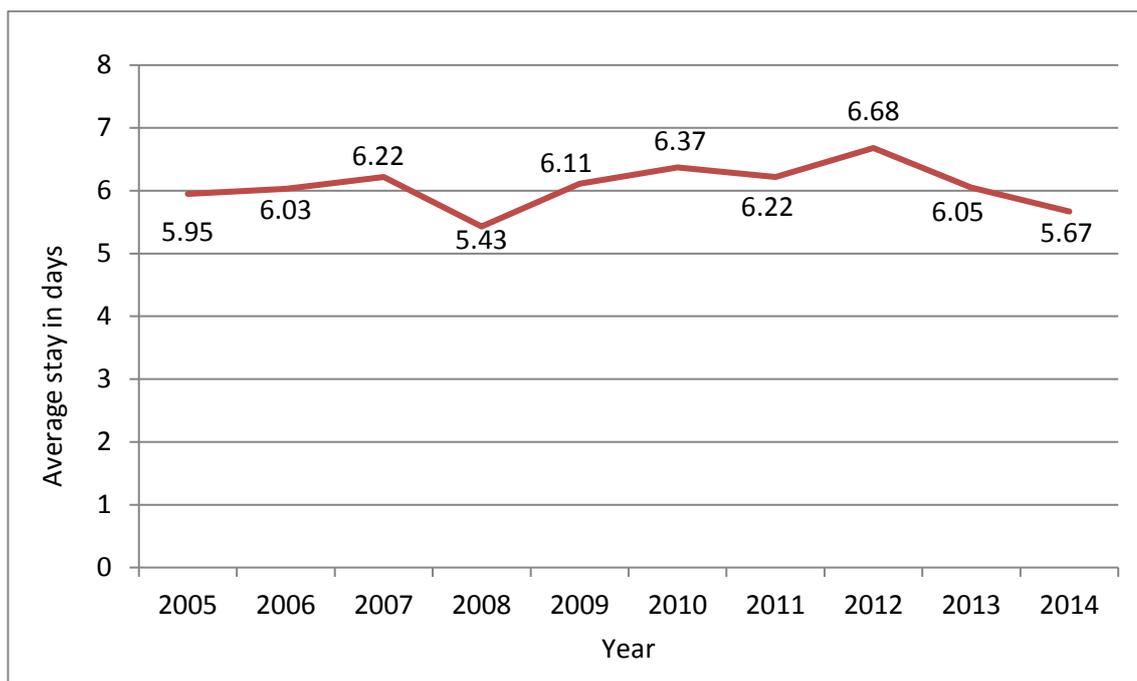


Figure 3.1.3. Russian tourists' average length of stay in days 2005-2014 (Slovenian Tourist Board, 2014)

Figure 3.1.4. features that the biggest overnight stays' share of Russian tourists goes to health and spa resorts (47.8%). Seaside resorts take 27.8% of share. This information proves that mostly Russians seek spa, wellness or health and seaside holidays in Slovenia. Only 10% are interested in mountain resorts and 8.3% in visiting the capital.

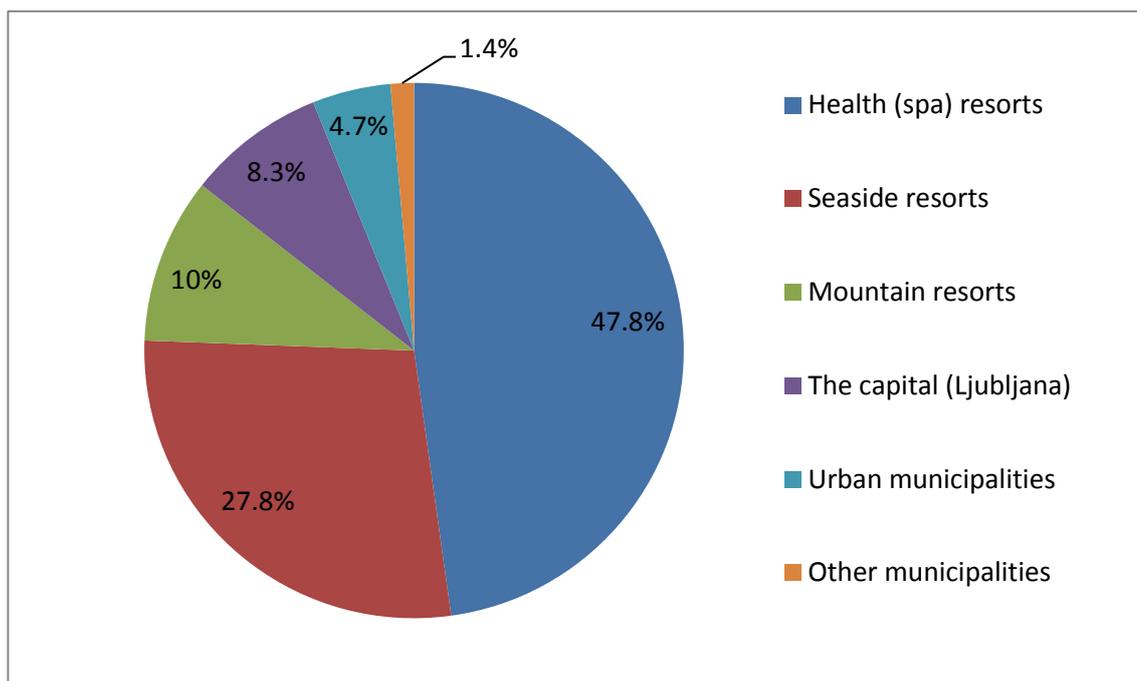


Figure 3.1.4. Share of overnight stays of Russian tourists in Slovenia in 2014 by types of municipalities (Slovenian Tourist Board, 2014)

It is important to emphasize that Russian leisure sociology and customer's behavior studies are quite limited as the country has just now gradually come into scientific reflection of modern events after a lot of historical upheavals. Especially researches concerning outbound tourism as a very new public phenomenon and even more recent spa and wellness phenomena, have suffered from not being explored.

«By 1858 many members of the younger generation, now prominent in the history of Russian literature or the socialist movement, had participated in tourism in the west for mostly health reasons» (Layton, 2009, p. 855). Approximately at that time the history of health tourism abroad has started for Russians. It cannot be characterized as a massive movement, being available just for high social classes.

However, only in the 1880s, the Russian consumer market for tourism was created, when Russia's first tourist agency, imitating the business of Thomas Cook, was established by Leopold Lipson. After the change of the political regime in 1917 travels abroad became very restricted.

«Until the early 1990s, the tourism industry in the USSR was primarily represented by internal tourism and, to a much lesser extent, by outbound and inbound tourism. Outbound and inbound tourism were poorly developed mostly because of political reasons. The formation of a new system of market relationships in the post-Soviet Russia had an undeniably positive impact on the tourism industry and market development» (Furmanov et al., 2012, p. 17). And truly, after the collapse of the Soviet Union, the situation has changed significantly.

Awara Group provides some general facts about modern Russian market and consumers. Firstly, Russians are well educated, demanding and skeptical buyers. They are especially loyal to premium brands. High level of luxury consumption is typical to Russians and not only to its wealthy class. Secondly, Russians are slow to trust new companies and they are not very accustomed to e-commerce. Thirdly, Russian consumers do not save on travelling and spend a significant amount of money abroad (on average \$1 000 per head and 72% of payments are in cash). The Russian market is a rapidly developing market. By 2025 Russia is expected to be the biggest consumer market in Europe (Awara Group, 2013).

The author Комиссарова (2014) insists, that Russian consumers cannot be measured by any existing model (ex. the American theory of generations), as Russians live in a very different reality. She claims that the Russian generation of the 90s is a lost generation for marketing. It had too large number of segments, since the rapidly changing events provoked very different practices and earnings in the absence of market experience.

However, later Russians had acquired market experience quickly and three psychological types of consumers, not depending on age, shaped clearly (Комиссарова, 2014):

1. Conservative consumers following patterns of 1980-1990s or “Traditionalists”. Most of Russia's population (50%) still stays in the stereotypes of the 90s, moving against the trend. These consumers suffer from market anachronism, that is, they take a decision on the basis of an old criteria of family passive stereotypes (what is useful and important for the family). “Traditionalists” give the same reactions as their ancestors, who have seen food shortages, famine and war. For example, when income falls, they start to save, however 45% of earnings are spent on food. These buyers are very interested in low prices.

2. New market experience chasers or “Common man”. For 40% of Russians revenue growth and acquisition of market experience are typical. These consumers follow the trend. For example, rest on dachas they replace with holidays in Egypt or Turkey, and visit these countries year in year out. “Common man” tends to learn and will to try new things, although the mechanism of decision-making is to copy the successful experience of the others, to behave like most of the friends and acquaintances.
3. Qualified consumers or “Innovators”. 10% of Russia's population sees the situation quite differently, creating a trend themselves. For these consumers, a healthy lifestyle is an attitude to life, not just cycling, like it would appear for previous group representative. “Innovators” first try and then bring novelties in their environment. This is the most promising group in terms of changes.

Suchwise, only 50% of Russian consumers are quite compliant to try something new, while other 50% move against the current.

The Russian market is highly segmented and only partially resonates with the West. The consumer acculturation theory suggests four categories, which describe modern Russian consumers' reactions (Prime & Triers, 2012):

- 1) marginalization (uncertainty, confusion, loss of orientation, anti-consumption behavior);
- 2) segregation (nostalgic consumer, traditionalist consumption and purism);
- 3) assimilation (western materialistic identity, western production and culture);
- 4) integration (positive combination of traditional Russian and modern foreign consumption practices).

Russian luxury consumption is worth mentioning as a type of Russians consumers' behavior. Some research proves that Russia becomes the prime mover of the luxury world market (Kaufmann et al., 2012). However, Russian luxury consumption differs from that of Western societies. Nowadays growth in desire for luxury goods are explained by the previous Soviet system, which officially condemned moneymaking and supplied ordinary Soviet citizens with things to meet their functional needs. Only the Soviet elite had excess to luxury products. The changed system, after the collapse of the Soviet Union, made considerable amount of luxury products and experiences accessible in the Russian market.

The All-Russian Public Opinion Research Centre held a questionnaire of Russians, trying to explore what are the most popular indicators of luxury. The highest ranked results include luxury cars, big apartments and traveling abroad (Kaufmann et al., 2012).

Euromonitor's market research forecasts following consumer trends in Russia (Euromonitor International, 2014):

1. Growing disposable incomes fuel consumer demand.

All segments of population in Russia mentioned their continuing income growth. Meanwhile income growth will be unequal, the strongest growth will be experienced by people with the highest income. These two tendencies have boosted the demand in all markets. However, many markets including leisure have become very competitive, with both international and domestic companies trying to attract even-more rational Russian consumer. Nowadays, the Russian market is compared with mature European markets, which may result in the need for differentiation and niche marketing, especially in the situation of dense companies' competition.

2. High-income earners have a growing appetite for luxury goods.

In 2008 there were 110 billionaires and 130 000 millionaires in Russia. Their wealth continue to grow faster than the income of other classes, thus the lifestyle and consumption preferences of the high class are very different. Top earners expect to receive exclusive luxury goods in order to demonstrate social status. Producers of luxury brands will have to provide innovative goods for conspicuous consumption of high-income earners, trying to differentiate their products from those offered to middle-income consumers, as well as from counterfeits, which are widely available in Russia.

3. Russia's changing demographics shape consumer markets.

Russia is the 9th populated country in the world. However, they expected a decline in numbers of population because of low birth rates, low life expectancy and high death rates. Lately birth rates start to recover as more families are provided with secure income and economic constraints are not any longer convincing them not to have children. This trend may result in growing market for babies and children. At the same time low life expectancy and small pensions will not let the sector of elderly retired people to develop, forcing them to restrict their spending even on necessities.

4. Consumers spend more on non-essentials.

1990s were hardly surviving times for Russian households, while 2000s have boosted consumers' optimism. Not only very rich people, but also middle-class started to spend on non-essential goods and use more sophisticated leisure opportunities. While there is a growing gap between richest and poorest in Russia, there is well-off middle class, which is quite promising for advertisers. This class is searching for balance cost, quality and enjoyment. They are gaining confidence and curiosity to shop on the high street, but are sensitive to prices.

5. Notable differences between Moscow and St. Petersburg, and the rest of the country.

In 2007, 76% of all Russians lived in urban areas and over 10% lived in St. Petersburg and Moscow. The gap between rural and urban areas is profound, but the difference between two main cities and other territory is even more noticeable. Mostly all investments during last years were focused on Moscow and St. Petersburg with their well-off consumers. Nowadays people of other big cities experienced income growth and as a result, more investors look for opportunities to put money into other developing cities, serving their new markets.

«Russia is complex because of its size, the diversity of nationalities who live there, and a set of consumer conventions and customs that are inordinately ‘foreign’ to many Westerners» (Strutton et al., 1995, p. 77). One of mentioned consumer customs is Russians' belief that foreign products are of better quality, style and reliability.

At least this trend existed till the 2008 global economic crisis. «As Russian income decreased during the economic downturn, they were forced to choose products with lower unit prices. This meant they had to buy local products, and in doing so, they discovered that their quality was satisfactory» (Prime & Triers, 2012, p. 5). Due to the crisis Russians realized that the products made in their own country equal those, produced in the West, but cost less having no advertised brand names. It is also remarkable that a decade of Westernization of Russian market produced opposite effect of customer's nostalgia for authentically Russian brand names and a return to original brand associations (Ostapenko, 2009).

Given information of modern Russian consumers' reactions show that full convergence of the West with the Russian market is rather unlikely and as a consequence future market

researchers will have to face more and more complex layers of Russian cultural change and hence consumption styles.

This subchapter presented Russian Federation citizens' travelling abroad statistics, marketing segmentation of Russian consumers and modern trends. Next subchapters offer the results of Russian spa, wellness and health market research in Slovenia.

3.2 Research preparation

Previous chapters provided general theoretical information about health, wellness and spa destinations, their management and competitiveness, Slovenia as a competitive wellness tourism destination, its health, wellness and spa resources.

Health, spa and wellness Russian consumers are not yet seriously studied as the trends have appeared very recently. Thereby research presented in this part of the paper is of current interest.

The research aim is to explore the competitiveness of Slovenia as a spa, wellness and health destination for the Russian market.

The main research question to be answered is whether Russian tourists find Slovenia as a satisfactory and competitive spa, wellness and health tourism destination with still unreleased potential and possibility to gain bigger percentage of Russian market.

There are two research methods used in the paper: secondary data collection and analysis and a questionnaire.

The quantitative research was chosen with the purpose of reaching a large group of people and receiving their opinion in the quickest way possible. Explanation and generalization of the results was a goal.

Secondary data collection and analysis was applied in the beginning of the empirical part of the paper in order to review the existing information about the Russian health, wellness and spa tourism market in Slovenia. Official statistics were used for the analysis.

The main part of the research was undertaken with a questionnaire method. The questionnaire consisted of 15 questions, most of which were closed type of questions and multiple choice, often with several answers possible. A five-point Likert scale was used for several questions where respondents had to rate their satisfaction. Several open questions were used where respondents' personal opinion was required.

The questions were compiled in such a way that the following information would be collected: demographic, number of visits and ways of traveling to the destination, reasons for visiting, competitiveness of the destination, important characteristics of wellness centers, problems faced during stay, overall satisfaction and possible managerial improvements.

At the end of the research, 103 questionnaires were collected through Google Forms service. The participants targeted were Russian tourists, who were staying in Slovenia for spa, wellness or health reasons.

The Google Forms questionnaire service was chosen for the convenience of Russian tourists staying in Slovenia on holidays. This method provided an opportunity of distributing via the internet.

However, the confidentiality of guests' database was the complication for this research. As a result, most of the respondents were invited personally to fulfil a questionnaire on portable computers in some of Slovenian health, wellness and spa resorts.

The data was analyzed by computing software, available in Google Forms. However, only closed questions were transformed to graphs, pie chart and tables automatically. Open questions were analyzed and classified mechanically with the help of an Excel file, additionally created by Google Forms.

Among the disadvantages of the chosen method are the need for participant to be «online» and possess some computer skills. Nevertheless, there are much more advantages, including minimal cost, design flexibility, no time and place frames for the respondents, simplicity of data gathering and analyzing.

Results of the research are presented in the form of figures and tables with some explanations, visualizing the information received from each of 15 questions. Discussion part of this chapter unites theoretical and research data in order to outline possible scenarios of Russian spa, wellness and health market development in Slovenia, which can be used for better control of this market, its satisfaction, growth and maintaining tourists' interest in a destination.

3.3 Results

Question 1. Gender (mark an appropriate answer)

The respondents participated in the questionnaires are 44.7% male and 55.3% female.

Question 2. Age Group (mark an appropriate answer)

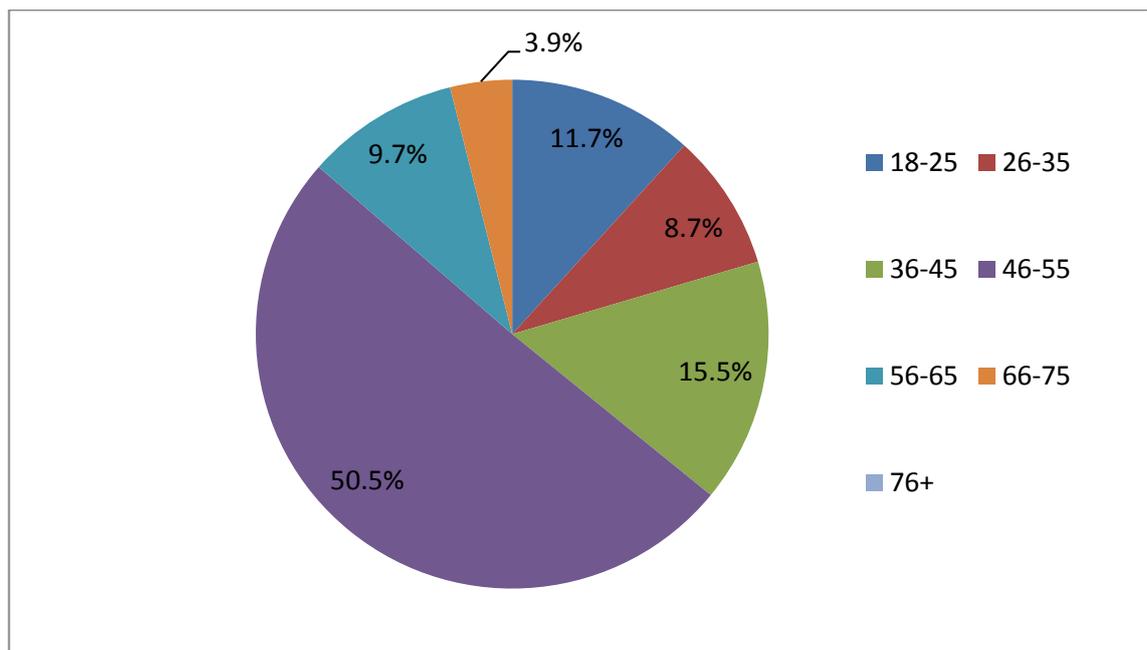


Figure 3.3.1. Age group of the respondents (compiled by the author)

For the reason of deeper analysis the respondents were also separated by age groups. 50.5% of them are from 46 to 55 years old. The second by percentage share is the group of 36-45 years old. These two groups of Russians are normally the wealthiest ones as they are of working age and were even probably to make savings over the years. They are the most travelling groups in general (Awara Group, 2013). 18-25 and 26-35 years old respectively cover 11.7% and 8.7% share. There are 9.7% of 56-65 group representatives

and only 3.9% of 66-75 group representatives. The group of 76 years old and more does not present.

The reduction in travelling ability of Russians aged around 56 years old may be explained by decrease in income as pensions are frequently small in the Russian Federation, as well as health reasons may not let a traveler cover long distances from his or her home town towards the destination (Slovenia in this particular case).

Question 3. Home town (write down an answer)

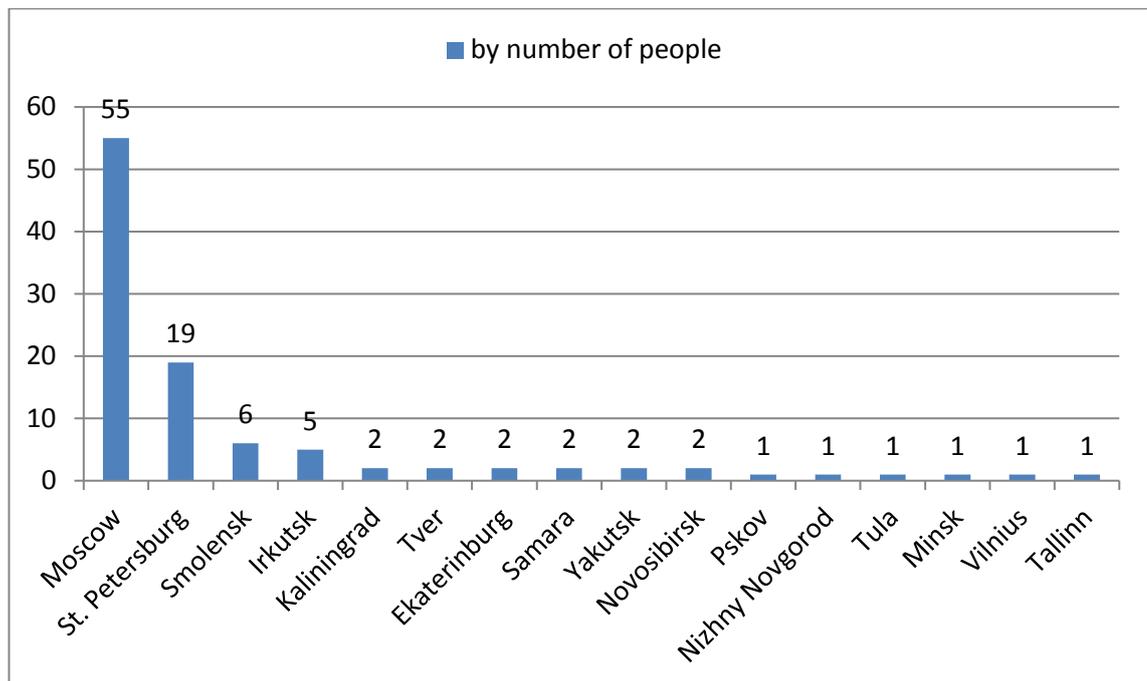


Figure 3.3.2. Home town of the respondents (compiled by the author)

Figure 3.3.2. covers the imaginative map of Russian tourists' home towns. 55 out of 103 respondents are living in Moscow and 19 respondents in St. Petersburg. These two cities are the official and north capitals of the Russian Federation, what characterizes them as the most populated towns or megalopolises and high income working areas (2x national average salary) (Awara Group, 2013). No wonder that 74 Russian tourists from 103 interviewed are coming from the largest cities.

However, this is not the only reason. Moscow and St. Petersburg are situated in the European part of Russia, which is closer to Slovenia and much better connected in terms of transport (Furmanov et al., 2012). From Moscow to Ljubljana, Slovenian capital, is

around 2 300 km, from St. Petersburg – around 2 400 km, while if a person travels from Yakutsk, the distance increases by 4 times and equals around 10 500 km. Transportation costs and time consumption for travelling will vary very significantly in this case.

From the European part of Russia, there are also Smolensk citizens – 6, Tver – 2, Samara – 2, Pskov – 1, Nizhny Novgorod – 1, Tula – 1. From Northern part of Russian Federation, there are tourists from Irkutsk – 5, Yakutsk – 2, Novosibirsk – 2. From Ural – 2 Ekaterinburg citizens, from Baltic region – 2 Kaliningrad citizens. There are also Russian travelers from other countries: Belarus, Minsk (1); Lithuania, Vilnius (1); Estonia, Tallinn (1).

Question 4. Is this your first visit to Slovenia? (mark an appropriate answer)

Almost half of the respondents (49.5%) visited Slovenia previously and other half (50.5%) did it just once. This numbers are quite impressive as they proof that Russian tourists find Slovenia destination attractive for coming back again and again.

Question 4.1 How many times have you visited this tourist destination in the past? (mark an appropriate answer)

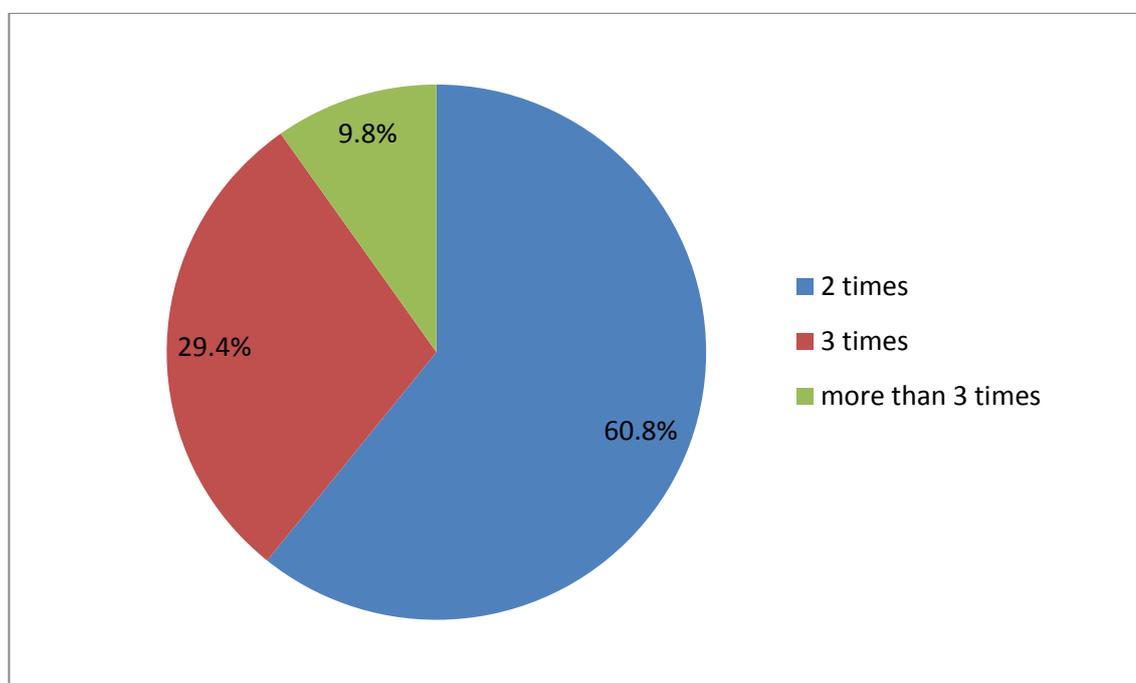


Figure 3.3.3. The number of times the respondents visited Slovenian in the past (compiled by the author)

60.8 % of Russian tourists visited Slovenia 2 times in the past, 29.4% of them returned 3 times and others (9.8%) were in Slovenia more than 3 times overall. This information proves that Russians may be brand loyal to a country as well.

Question 5. Did you use tour operator/agent services to reach Slovenia or travel independently? (mark an appropriate answer)

45.6% of respondents affirmed that they traveled independently, when 54.4% claimed that they used tour operator/agent services. This situation is very interesting for the Russian market, as the trust for organized holidays is shifting more and more to the side of independent travelling.

In this particular sample the shift might be caused by 49.5% (51 persons) of respondents, who visited Slovenia more than once and succeeded to make contacts with the receiving party or used Internet booking services, what helped them to return back. 31 respondents, who visited Slovenia twice or more, have traveled independently. However, 20 respondents with the same amount of visits to Slovenia still used tour operator/agent services.

Nevertheless, in general, Russian tourists gained travelling experience over the years after the collapse of Soviet Union and now they feel more confident while abroad. Moreover, the fraud with tour agents and operators' business, which happened several years ago in Russia, provoked mistrust for their services.

The choice to buy a tour package from tour operator/agent or travel independently does not seem to depend on age group or reasons for travelling, as all age groups and motives to travel are presented in similar numbers for both choices.

**Question 6. What are the main reasons for your visit to this tourist destination?
(mark one or several answers)**

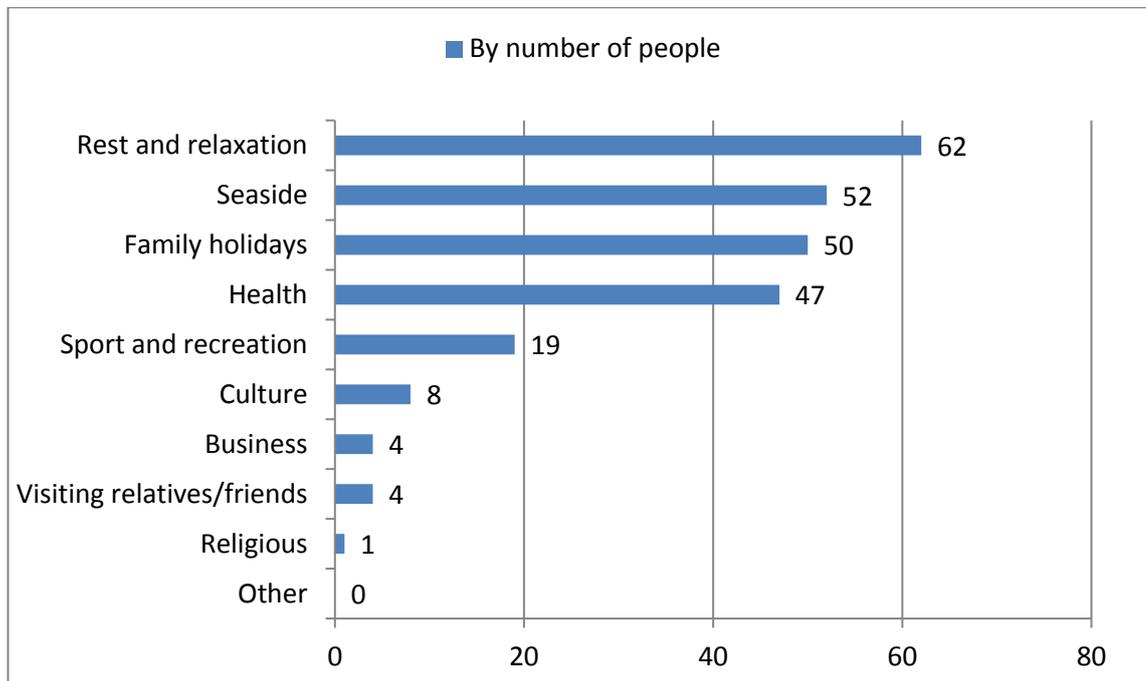


Figure 3.3.4. Main reasons of the respondents to visit Slovenia (compiled by the author)

The main reasons for Russian tourists to visit Slovenia appeared to be ‘rest and relaxation’, chosen by 62 people, ‘seaside holidays’ (52 people), ‘family holidays’ (50) and ‘health’ (47 persons). There is a clearly visible pattern that seaside and family holidays are most of the time a connected choice. This can be called classical holidays for Russian families as people from big cities and north regions search for different nature, milder climate and warm seas. Health and family holidays are rarely connected as health improvement reason is more individually oriented.

Only 19 tourists were led by sport and recreation motives, 8 by culture, 4 by business, 4 by visiting relatives and friends and 1 person had religious reasons to visit Slovenia.

Question 7. Have you ever been to other countries for wellness, spa or health tourism purposes? (mark the appropriate answer)

59.2% of the respondents visited other countries for wellness, spa or health tourism purposes. This impressive percentage shows that Russians are interested in wellness, spa and health tourism and that last 25 years they finally had a possibility to travel abroad for these reasons.

Question 7.1 Please, name these countries? (write down an answer)

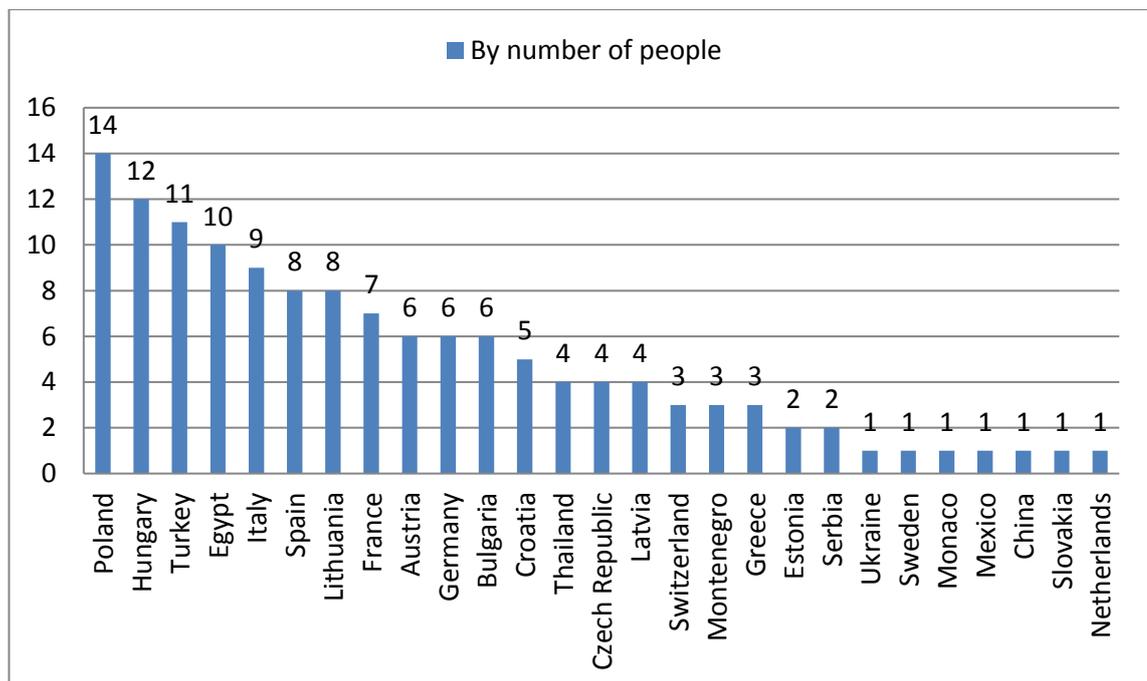


Figure 3.3.5. Other countries, which the respondents visited for wellness, spa or health tourism purposes (compiled by the author)

The majority of the respondents visited Poland (14 people) and Hungary (12 people) for wellness, spa or health tourism purposes, what is quite naturally as these countries are former Soviet Union parties, closer destinations and offer affordable prices for wellness holidays. Turkey (11 people) and Egypt (10 people) are second most visited destinations as they provide all-inclusive services, seaside and family holidays for good price, what a lot of Russians appreciate.

It is worth mentioning that during the previous year the organized tours to Egypt and Turkey were prohibited due to unsafe political situations in these countries. Thus other destinations received a good opportunity to target the Russian market instead.

From other European Union countries Italy leads with 9 people visits, Spain and Lithuania follow with 8 tourists, France – 7, Austria and Germany – 6. Bulgaria and Croatia were visited by 6 and 5 respondents respectively. Thailand, Czech Republic, Latvia are three times less popular than the leader of the diagram Poland (4 people visits), 3 visits – Switzerland, Montenegro, Greece, 2 – Estonia, Serbia, 1 – Ukraine, Sweden, Monaco, Mexico, China, Slovakia and Netherlands.

Next two questions (7.2 and 7.3) about advantages and disadvantages of Slovenia in comparison with other visited wellness destinations were open questions. The results are processed, translated and placed in tables under the most mentioned categories. The description column provides the most frequently used advantages and disadvantages, named by the respondents.

Question 7.2. What are the advantages of Slovenia in comparison with other countries you have visited for wellness, spa or health tourism? (shortly write down your answer)

Table 3.3.1. The advantages of Slovenia in comparison with other wellness, spa or health tourism destinations

Categories	Elements	Mentioned, times	Description
Nature	<ul style="list-style-type: none"> • A lot of greenery • Fresh air • Warm sea waters • Mountains • Thermal waters 	25	‘diversity of nature’, ‘beautiful’, ‘great’, ‘marvelous’, ‘stunning’, ‘lovely nature’
Climate		12	‘good’, ‘comfortable’, ‘warm and mild’, ‘Mediterranean climate’

Table 3.3.1. continued

Categories	Elements	Mentioned, times	Description
Services	<ul style="list-style-type: none"> • Spa and health services • Cuisine • Specialists 	22	‘wide choice, diversity of spa treatments’, ‘individuality of spa’, ‘good health programs’, ‘good cuisine’, ‘sauna without swimming suites’, ‘spa services near the sea shore’, ‘staff professionalism’
Safety & Atmosphere		9	‘safe country’, ‘personal safety’, ‘no political conflicts’, ‘favorable environment’, ‘homely atmosphere’, ‘desire to come back’
Price		7	‘loyal price’, ‘price meets the quality’, ‘lower price’
‘European’		6	‘European standard’, ‘European level of service’, ‘European quality’, ‘service without compulsion’, ‘country level of development’
Location		5	‘everything is close’, ‘short distance between the sea and mountains’, ‘walking routes’
Infrastructure		4	‘developed’, ‘good’, ‘worthy infrastructure’
Slavic language & Locals		3	
Less Russian Tourists		2	‘not very popular destination for Russians’
No advantages		2	

Source: compiled by the author

The absolute leader of Slovenian advantages is nature. 25 Russian guests mentioned that they are impressed by greenery, fresh air, warm sea waters, thermal waters and mountains. Almost all of them complimented Slovenian nature calling it at least ‘stunning’. Close to nature category is climate, which was found very ‘comfortable’ by 12 respondents.

Second by the amount of being mentioned (22 times) is the service category. Russian visitors liked the diversity of offered spa and health services, enjoyed Slovenian cuisine and found staff to be professional. After the world unrest and political conflicts happened lately, Russians start to appreciate safety and atmosphere reminding them of home (9 respondents' answers).

Only 7 respondents believed price to be an advantage of Slovenia as spa, wellness and health destination. This is logically a small number of people as the currency exchange rate was not very beneficial for those who decided to visit Euro Zone countries this year. The Russians have an expression ‘European standard’, which means that the thing is of a

good quality (Strutton et al., 1995). 6 respondents confirmed that Slovenia offered ‘European level of service’. 5 respondents were happy to find that the distance between natural attractions is short. Only four respondents mentioned infrastructure was good. 3 persons believed Slavic language and local people to be beneficial. 2 respondents mentioned that they liked Slovenia not to be occupied by their compatriots. And only 2 respondents said that Slovenia had no advantages in comparison with other spa, wellness and health destinations.

Question 7.3. What are the disadvantages of Slovenia in comparison with other countries you have visited for wellness, spa or health tourism? (shortly write down your answer)

Table 3.3.2. The disadvantages of Slovenia in comparison with other wellness, spa or health tourism destinations

Categories	Mentioned, times	Description
No disadvantages	20	
Personnel	17	‘unfriendly, rude staff’, ‘slow reaction on complaints’, ‘no Russian speaking workers’, ‘bad English’, ‘low qualification of personnel’, ‘less hospitable staff’, ‘poor service level’
Price	15	‘currency exchange rate’, ‘unreasonably expensive’, ‘exaggerated prices for spa services’
Organization of services	6	‘poor organization of some services’, ‘no smoking zones in spa’, ‘small, badly equipped beach’, ‘poor children's entertainment’, ‘lack of esthetics in spa’, ‘lack of Slovenian traditional treatments’
Transport	2	‘no direct flights’, ‘poor transport connection with Russian Federation’
Infrastructure	2	‘old hotels’
Visas	1	
Weather	1	‘sometimes unlucky with weather’
Destination	1	‘not promoted destination’
Spas	1	‘absence of very luxurious spas’
Other services	1	‘lower attractiveness of other journey elements: cuisine, night life, shopping’

Source: compiled by the author

20 respondents out of 61 have not seen any disadvantage of Slovenia in comparison with other spa, wellness and health destinations.

The next largest category of disadvantages is personnel (mentioned 17 times), what is regularly happens in tourism as human factor plays a crucial role there. One of the most frequently named issues was 'unfriendly, rude staff' and 'slow reaction on complaints'. Russian guests were also upset by staffs' poor Russian and English communication skills.

In connection with the previous table 15 respondents complained about unreasonably expensive spa services, which might be a result of spa, wellness and/or health hotels price policies and currency exchange rates.

6 respondents claimed 'poor organization of some services', what included children's entertainment, beach organization and absence of smoking zones in spa. 'Lack of esthetics and Slovenian traditional treatments in spa' was also emphasized.

Only 2 respondents were bothered with old infrastructure. If we take into consideration the previous table's information about the same category, one can see that Russian guests did not find Slovenian hotels either very advantageous, nor very disadvantageous.

One Russian tourist mentioned visa as a disadvantage. 'Bad weather', 'not promoted destination', 'absence of very luxurious spas', 'lower attractiveness of other journey elements: cuisine, night life, shopping' were each mentioned once.

Question 8. What are the most important characteristics of Slovenian wellness/spa/health centre for you? (mark one or several answers)

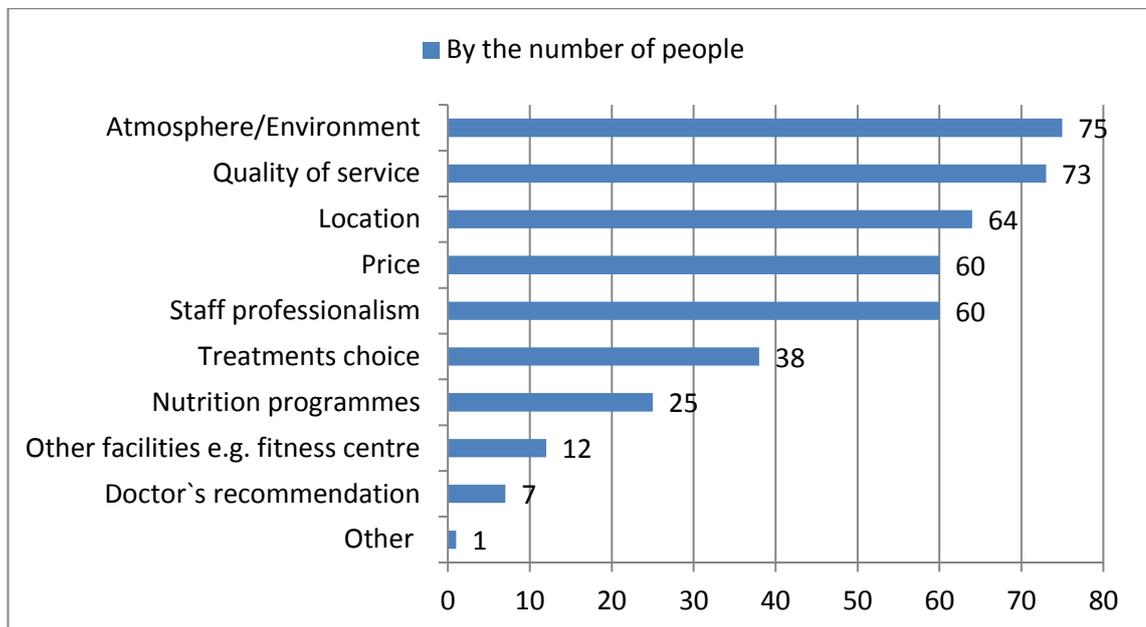


Figure 3.3.6. The most important characteristics of Slovenian wellness/spa/health centre, according to the respondents (compiled by the author)

75 people out of 103 respondents interviewed think that atmosphere/environment factor is the most important for them in Slovenian wellness/spa/health centre. Quality of service follows with 73 tourists' votes. Location (64 people), price and staff professionalism (60 people) took 3rd and 4th positions in the priority diagram. Most of the respondents chose all these characteristics together as the complex of them seemed to be beneficial.

Treatments choice was almost half as important, emphasized by 38 tourists. 25 respondents were positive about nutrition programs and 12 about other facilities. Only 7 persons consider doctor's recommendation, which may give an idea of future cooperation between Slovenian health resorts and Russian hospitals.

One respondent specified that the water is an important characteristic of Slovenian wellness/spa/health centre.

Question 9. What treatment would you most look for at Slovenian spa/wellness/health centre? (mark one or several answers)

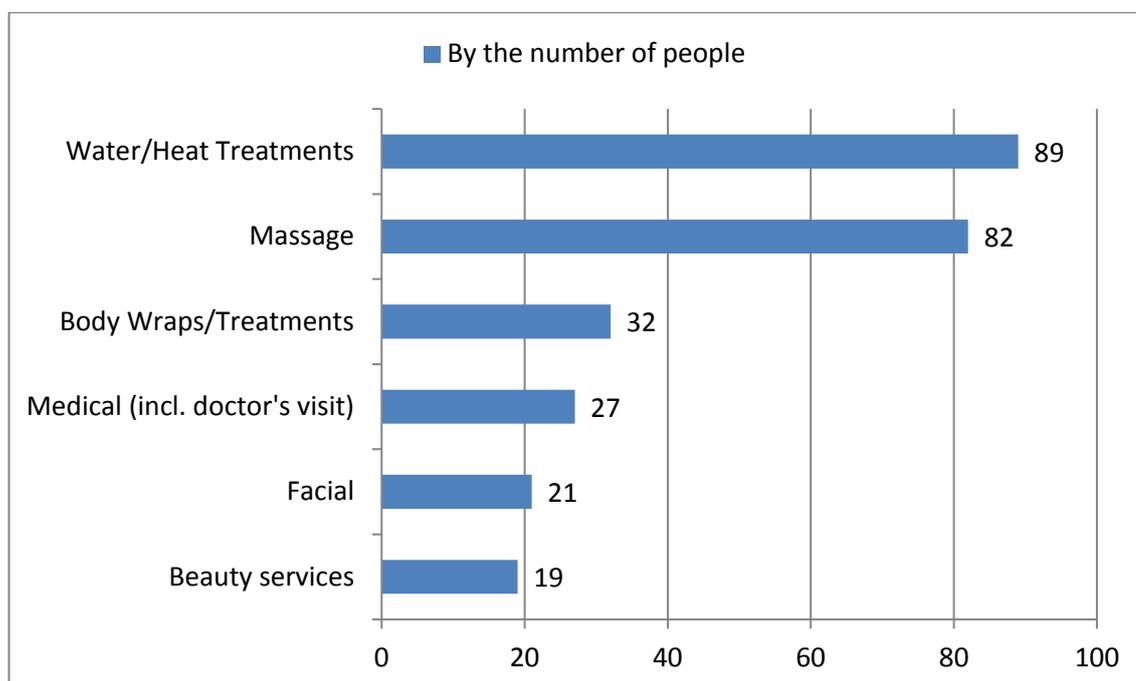


Figure 3.3.7. Treatments, which the respondents look for in a Slovenian spa/wellness/health centre (compiled by the author)

Absolute leaders for Russians are water/heat treatments (89 tourists' choice) and massages (82 tourist's choice). This is explained by the long Russian tradition of 'banyas', need for thermal and sea water and more trust in natural treatments like massages.

32 respondents chose body wraps/treatment, 27 – medical treatments, which require doctor`s consultation, 21 – facial treatments and 19 – beauty services.

Beauty services are visited only by women, as in Russia it is believed to be specifically women services. From 21 facial treatments – 18 are visited by women and from body wraps/treatments – 26.

Question 10. Is education on healthy lifestyle and well-being an important part of a wellness experience to you in Slovenia? (mark an appropriate answer)

Only 30.1% of Russian respondents believe that education on healthy lifestyle and well-being is an important part of their wellness experience in Slovenia. 20 out of 31 persons,

who answered positively, are women. In general healthy lifestyle is mostly supported by Russian women than man. The low interest can be explained by Russian national immunity to any education of 'how to live right' and desire not to have any limits during holidays.

Question 11. Are alternative therapies such as yoga, meditation something you would take part in when at Slovenian spa/wellness/health centre? (mark an appropriate answer)

The interest to alternative therapies is not much higher among Russian tourists than for education on healthy lifestyle, what is caused by the same reasons. Just 31.1% (32 persons) of the respondents participated in them when at Slovenian spa/wellness/health centre and 27 of them are women.

Nevertheless, there is always a percentage of visitors, who enjoy receiving educational information on health and participating in alternative therapies.

Question 12. Do you think beauty treatments must be offered in Slovenian spas/wellness/health centres (e.g. botox, eye treatments)? (mark an appropriate answer)

Here the situation is different as 40.8% (42 persons) of the respondents cannot see Slovenian spas/wellness/health centres without beauty treatments. 33 persons are female and 9 persons are male. Even if men do not visit beauty services, some of them think they are important for women to be presented.

Question 13. What were the most challenging problems that you face during your holidays in Slovenia? (mark one or several answers)

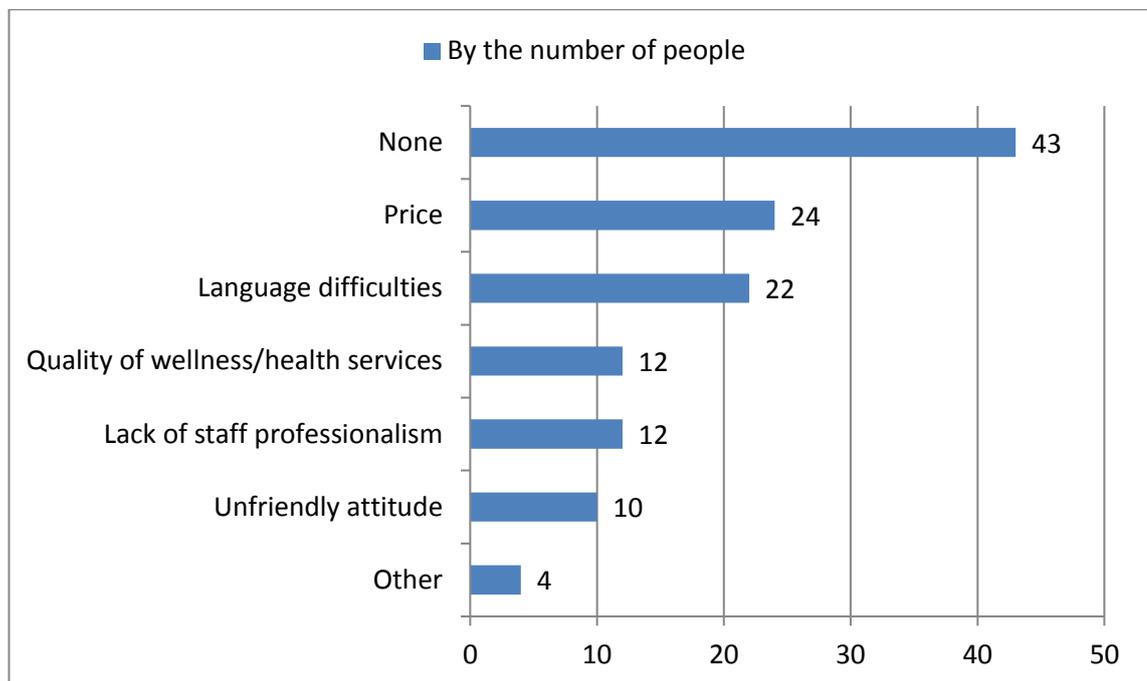


Figure 3.3.8. The most challenging problems the respondents have faced during holidays in Slovenia (compiled by the author)

43 respondents out of 103 have not experienced any problems visiting Slovenia, which is a good result for the receiving party. Being a price sensitive market, 24 Russians named price as a problem. 22 tourists faced language difficulties, 12 – quality of wellness/health services and other 12 – lack of staff professionalism, 10 – unfriendly attitudes. From other problems ‘unsafe entry into the water’, ‘difficulties with cancellation of treatments’, ‘unsociable staff’ were emphasized.

Question 14. To what extent do you agree with the following statements (1 means you completely disagree and 5 that you completely agree with it).

14.1. I am pleased that I decided to visit Slovenia

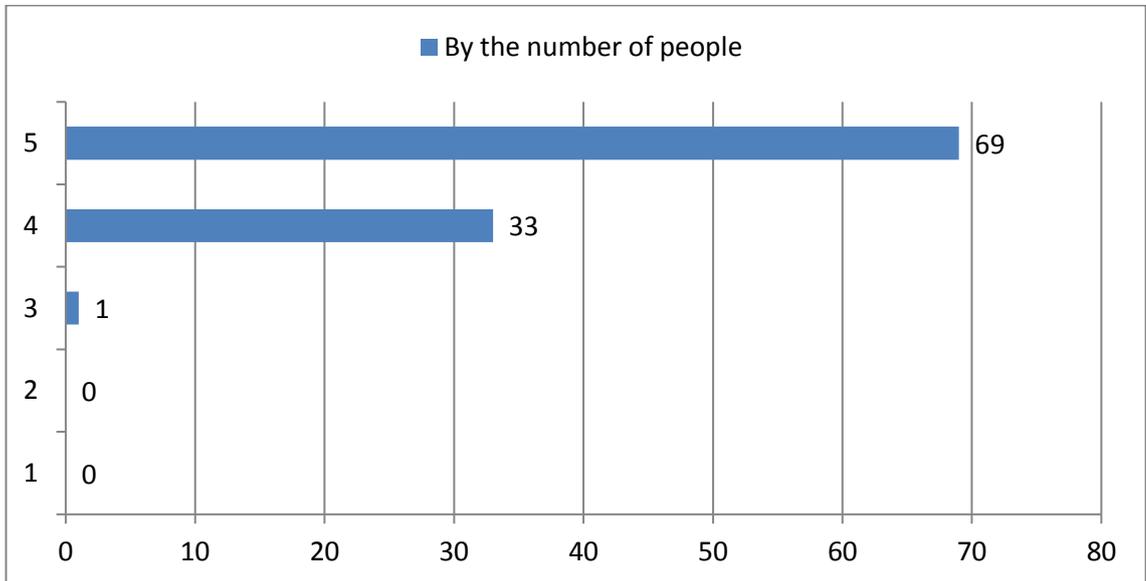


Figure 3.3.9. The respondents' satisfaction of visit to Slovenia (compiled by the author)

Almost every Russian tourist was very pleased to visit Slovenia. 69 people gave the highest possible mark to this statement, 33 respondents gave 4, and only one accessed it as 3.

14.2. I will return to this tourist destination

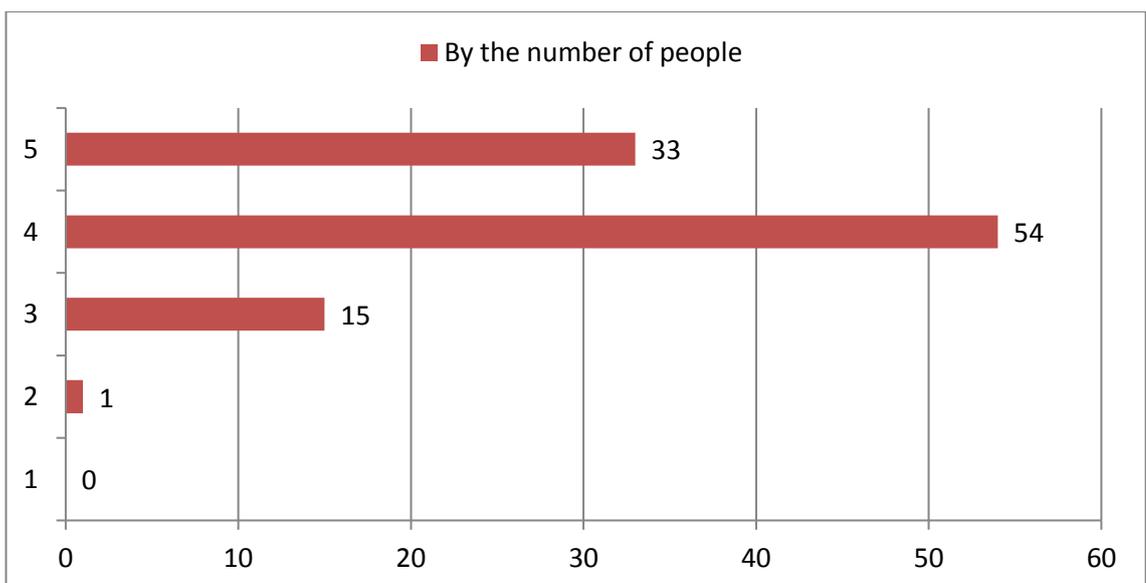


Figure 3.3.10. The respondents desire to return to Slovenia (compiled by the author)

33 Russian tourists feel absolutely confident that that they will return to Slovenia, and 54 respondents are inclined to do this. Only 16 people hesitate about it, which is a very good sign for the receiving party.

14.3. I feel at home in this tourist destination

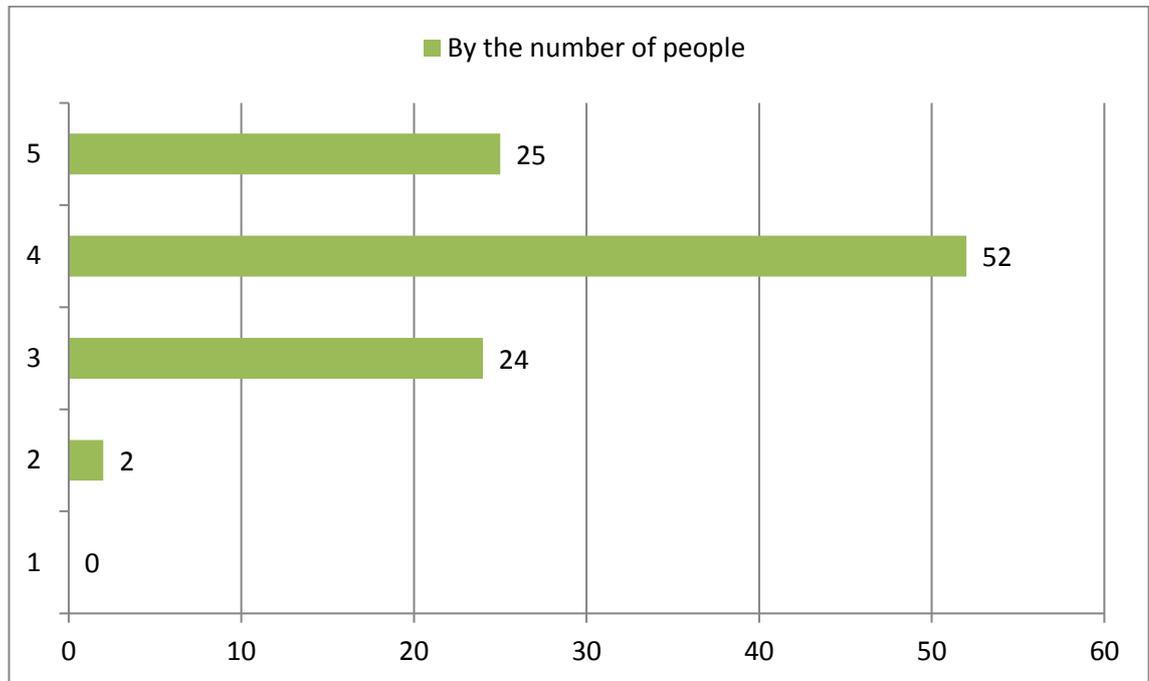


Figure 3.3.11. The respondents' feeling at home in Slovenia (compiled by the author)

25 Russian tourists feel at home in Slovenia and 52 almost agree with this statement. 26 respondents are hesitating about it, what was probably caused by language problems and/or unfriendly attitude they faced.

14.4. I am highly satisfied with spa, wellness and health services

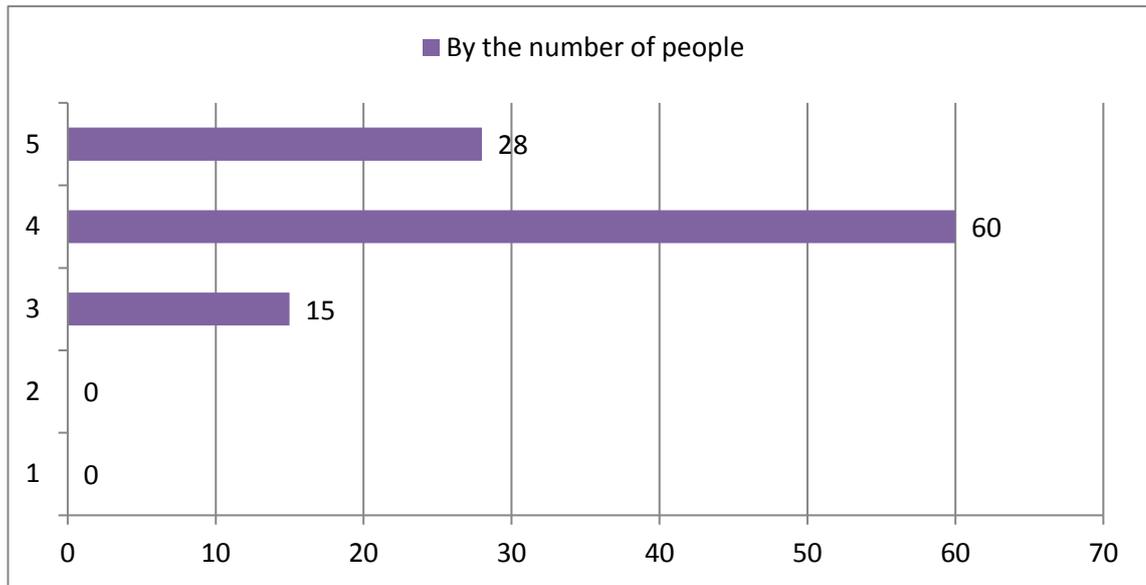


Figure 3.3.12. The respondents' satisfaction with spa, wellness and health services in Slovenia (compiled by the author)

28 respondents are highly satisfied with spa, wellness and health services in Slovenia, 60 tourists are simply satisfied, while 15 hesitate about the quality they have experienced.

14.5. I will speak highly of this tourist destination to my friends and colleagues

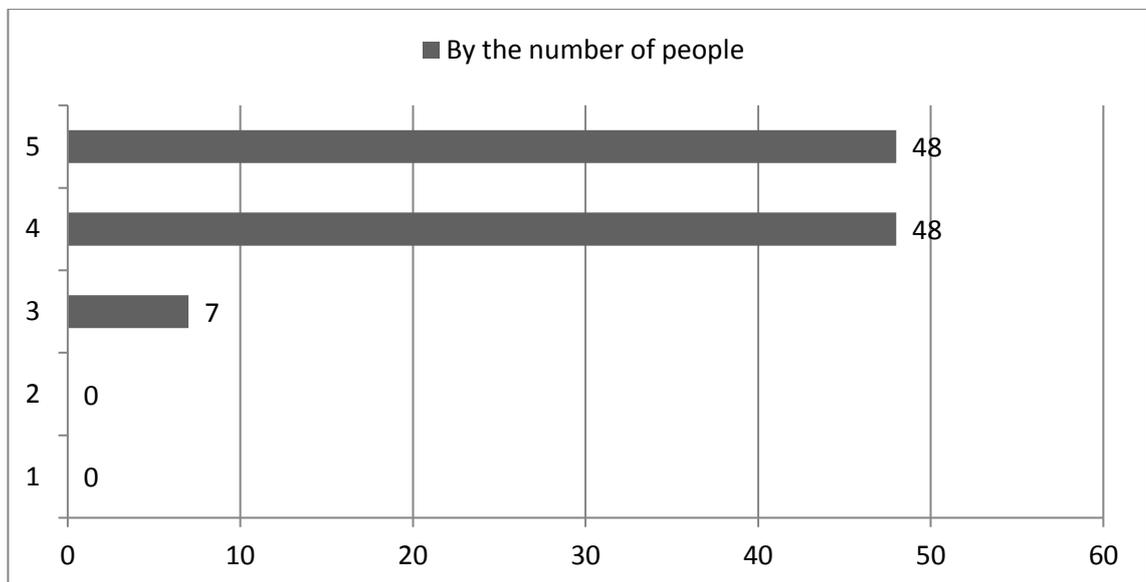


Figure 3.3.13. The respondents' promotion of Slovenia to their friends and colleagues (compiled by the author)

48 Russian respondents will speak very well about Slovenia to their friends and colleagues and 48 other will give positive descriptions too, what is good for receiving parties as Russians frequently trust their acquaintances (Комиссарова, 2014).

14.6. Staying at this tourist destination is worth every Euro paid

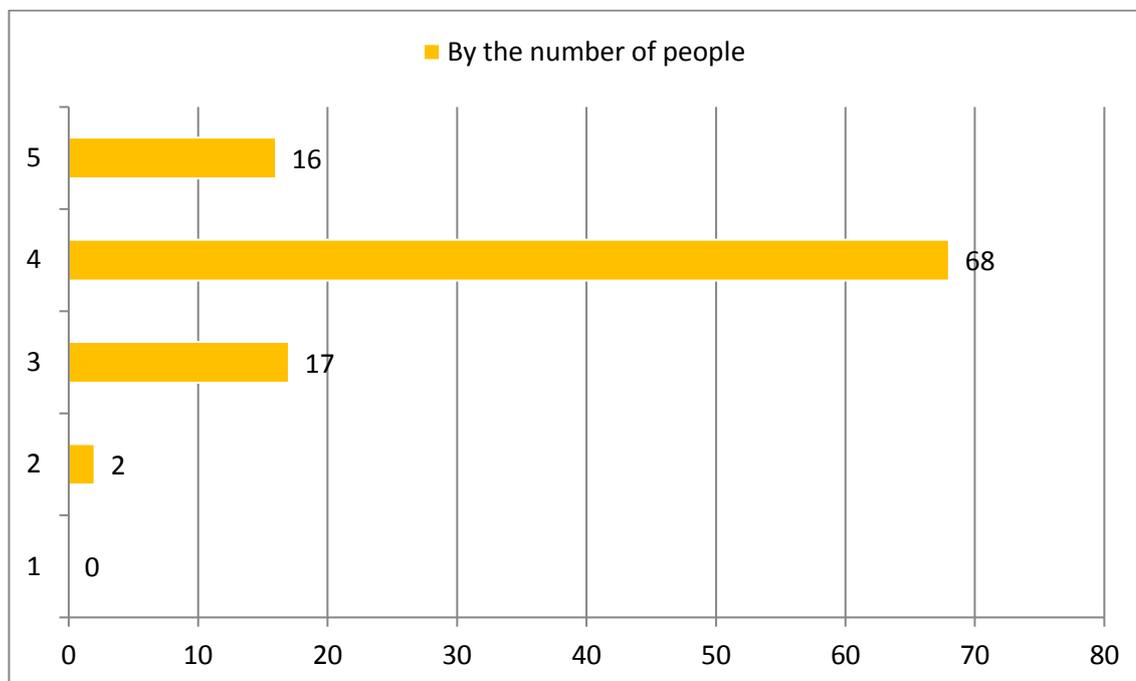


Figure 3.3.14. The respondents' agreement that visit to Slovenia worth paid money (compiled by the author)

Only 16 respondents believe that their Slovenia visit is worth every Euro paid. 68 Russian tourists are less confident about it. And 17 do not agree with the statement.

Next question (15) about factors which would improve tourist's experience in Slovenia was an opened question. The results are processed, translated and placed in the table under the most mentioned categories. The description column provides the most frequently used factors, named by the respondents. The table categories were also split into two groups 'Depending on the receiving party' and 'Not depending on the receiving party'. Thus first group maybe be improved by the hotels in the future in order to satisfied guests, when second group isn't under their control.

Question 15. What factor(s) would improve you experience in Slovenia? (write down an answer).

Table 3.3.3. Factors, which would improve the respondents experience in Slovenia

	Categories	Mentioned, times	Description
	None	24	
Depending on the receiving party	Organization of services	27	'easier booking and cancelation of spa services', 'less crowded beach', 'better work of the beach', 'safety on the beach', 'children`s club, area, programs in Russian language', 'new spa services', 'detox nutrition', 'included fitness program', 'bigger fitness center', 'excursions, offers for hiking and so on', 'developed night life', 'spa design', 'more traditional Slovenian spa procedures, rituals, cuisine'
	Personnel	21	'level of professionalism and personnel training', 'careful attention of managers to the tourists problems and their fast solution', 'staff`s desire to please guests', 'polite and smiley personnel', 'immediate satisfaction of tourists complaints', 'fast service', 'attention to tourists needs'
	Price	15	'more rational price for spa treatments'
	Quality of services	7	
	Language	6	'Russian speaking personnel', 'Russian TV', 'good knowledge of foreign language'
	Infrastructure	3	'modern hotels'
Not depending on the receiving party	Visas	6	'visa-free regime'
	Currency rate	2	
	Travelling time	2	'shorter flight'
	Weather	1	

Source: compiled by the author

24 respondents wrote that they did not wish to change anything in their holidays.

From depending on the receiving party factors, 27 Russian tourists would like better organization of services like 'better work of the beach', 'easier booking and cancelation of spa services', 'children's club, area, programs in Russian language', 'new spa treatments and other service offers'. 21 tourists wished for higher level of professionalism

and friendliness of staff as well as managers attention to their needs. More rational price for spa treatments would improve the holidays for 15 Russian guests. 7 persons mentioned quality of services, 6 – Russian speaking personnel, and 3 – modern hotels.

From not depending on the receiving party factors, visa-free regime, currency rate, travelling time and weather were named.

3.4 Discussion

The research demonstrated that Russians mostly perceive Slovenia as a health, wellness and spa tourism destination, according to the aims of visit (e.g. see Figure 3.3.4.). Information showed in the Figure 3.1.4. offered by Slovenian Tourist Board supports the statement.

Based on the «Developing a health and well-being tourism destination» model (Illing et al., 2014) and other main theoretical points, described in the previous chapters, and research results, the following conclusions and recommendations are listed below.

Endowed resources (nature, culture, authenticity, reputation)

Slovenia was marked well in comparison with other wellness destinations. The strongest sides are nature, climate and services. It is worth mentioning that self-identification research of opinion leaders and «I FEEL SLOVENIA» brand campaign (Konecnik Ruzzier, 2012) named nature as the core pull factor and the competitive advantage and included it in the marketing message for international promotion of the destination. That means the supply and the demand side have similar appreciation of this element. Since, nature and its resources are core products of Slovenia and are easily accessible for tourists, an authorized institution should constantly monitor the state of it in order to prevent undesirable changes or damage.

Culture was not very popular traveling motivation for Russian tourists (e.g. see Figure 3.3.4.), though should not be completely neglected. Cultural offerings might be combined in a package with wellness, especially since it is a trend (Smith and Puczkó, 2015).

The authenticity was not the focus of the research, nevertheless, it is another new trend (Smith and Puczkó, 2015), which should be researched in the future. Several tourists mentioned that they would add traditional Slovenian spa procedures, rituals and cuisine to make their experience better (e.g. see Table 3.3.3.). Perhaps, traditional treatments and rituals, natural cosmetics from local nature assets might become very popular among Russians and other visitors and add value to the wellness destination.

In consideration of Figures 3.3.9. – 3.3.14., it is clear that Russians have good attitude to Slovenia as wellness touristic destination. Tourists overall highly estimated their satisfaction of visit to Slovenia and its spa/wellness and health resorts, proved that they felt at home and showed their desire to return to Slovenia. Moreover, respondents claimed that they will promote Slovenia to their friends and colleagues. This information corresponds to the Table 2.1.1., where all foreign tourists' impressions about staying in Slovenia were collected. Overall, good reputation of touristic destination is a good base for continuing the attraction of Russian market.

Quality of services and Staff

As research proved staff professionalism and quality of services are important characteristics of Slovenian wellness/spa/health center for Russian guests (e.g. see Figure 3.3.6.). Notwithstanding, staff education, politeness, knowledge of languages, services' organization were mentioned by the respondents as disadvantages of Slovenia (e.g. see Table 3.3.2.; Figure 3.3.8.), what corresponds with the opinion of researchers on Slovenia competitiveness (Gomezelj Omerzel and Mihalič, 2008; Assaf and Knežević Cvelbar, 2011; Sibila Lebe et al., 2009).

Both quality of services and staff professionalism are vital for the wellness destination (Voigt and Pforr, 2014), thus managers should take the improvement of these elements very seriously. Among the competencies of personnel must be overall destination knowledge, social skills, the ability to identify customer expectations and service gaps. Refinement of the skills can be reached by trainings and language courses at the company and destination levels. Staff attitude to guests can be regulated by guidance of professional behavior.

Service quality tools (e.g. 5 gaps model, Ishikawa diagram, affinity chart, six sigma etc.) might be used to reveal the weaknesses in services and service design tools (e.g. user surveys, expert evaluation, customer journey etc.) to grant improved service experience.

Among the main competitors (e.g. see Figure 3.3.5.) could be named Poland, Hungary, Egypt and Turkey. Benchmarking tool can be used in order to compare the destinations offer.

Customer orientation, Hospitality, Sustainability

Likewise, the most favorable market to target will stay the same – Russians from big cities, mostly from European part of Russia (e.g. see Figure 3.3.2.), as they receive bigger salaries and are able to spend on travelling. Russians can be target as with the help of tour agents/operators or without their mediation, in other words directly.

Half of the guests traveled to Slovenia with families and returned to it twice (e.g. see Figure 3.3.3.). The most promising age groups are 46-55 and 36-45 years old, what unlikely to change at an early date (e.g. see Figure 3.3.1.). As it is written in the previous chapter, Russian tourists are loyal to brands and the birth rate growths (Euromonitor International, 2014), thus it is possible to conclude that holidays with children and baby services will be required as well as there is a good chance for Slovenia as a holiday brand to make Russian guests return year in year out.

Russian market having “Innovators” and “Common man” psychological types (50% of population), described above (Комиссарова, 2014), are friendly to be attracted. First “Innovators” must be interested and bring the tendency to visit Slovenia for “Common men”, who like to follow. This is how Egypt and Turkey were promoted (Комиссарова, 2014). Now when organized tourism to these countries is less popular, Slovenia can partly replace them as seaside and wellness destination.

Some researches and statistics prove the lack of interest to Slovenia in comparison with other EU countries. However, a growth of interest is forecasted for not yet explored destination (Furmanov et al., 2012). The only threat is economic crisis, which may prevent Russians to travel to Euro Zone countries.

To identify the target markets fully and to understand customers' needs, motivations and expectations future qualitative researches are required. The following methods can be useful: participant observation, interviews, focus groups, social media feedback analysis etc.

At best, Russian market trends include income growths (Euromonitor International, 2014). Many markets including leisure will become very competitive, so the receiving party should pay attention to differentiation and niche marketing. Assimilation of Russian culture with West is very unlikely (Prime & Triers, 2012), that is why further researching and monitoring of specifically Russian customers is very important.

Safety and atmosphere were mentioned as advantage of Slovenia in comparison with other health, wellness and spa destinations, though just 9 times (e.g. see Table 3.3.1.). Apart from products and services, tourists are buying emotions and improving hospitality makes wellness destination more competitive. Following dimensions of hospitality, explained by Ariffin (2013) can be taken into consideration and developed: personalization, warm welcoming, ability to be above and beyond the normal service delivery, sincerity, focus on physical and psychological comfort of tourists.

Sustainable development of tourism destination must embrace ecological, social and political, and economic directions. The national policy must include the strategy for sustainable development of the country.

Destination management (Collaboration, Concept and Demand, Operational activities, Quality level evaluation and improvement)

Some researchers discovered that Slovenian tourism industry is quite individualistic and there is a lack of collaboration between actors within the destination and between neighbor destinations (Konecnik Ruzzier, 2012). Collaboration might be a valuable strategy for Slovenia as it contributes to information exchange, cost-effective marketing, enhanced market visibility and more innovative product development and so force (Illing et al., 2014). Collaborative advantage could be an aim for wellness destinations like Slovenia, which do not have very powerful tourism industry players.

Russian tourists showed interest in quite traditional treatments as water/heat treatments and massages (e.g. see 3.3.7.). These treatments experience constant popularity (Smith and Puczkó, 2015), though new products development should proceed in conformity with demand and trends. Sport and recreation is another product for wellness/spa and health facilities to be offered in the future as a part of wellness experience. Growing interest in health issues inherent for some Russian segmented groups (Higher School..., 2014). There is an opportunity to expand Russian guests' treatments choice with education on healthy lifestyle, alternative therapies and nutrition programs. Beauty treatment must be presented anyway, as they are believed to be important by a big share of Russian tourists.

A destination itself and its attractions are not influencing the choice of a tourist by the extent it did before. Currently, a tourist pays attention to emotions that a destination can offer to enhance his or her life quality. Thus, marketing communication will endure a transformation at a destination level, when atmosphere, experience, ethics and conception will represent the core of a marketing message (Kirigs, 2013).

Nowadays economic and political situation in Russian Federation, led to the lack of positive emotions (Комиссарова, 2014). So Russian tourists will search for impressions, individual scenarios, and senses experiences, what Slovenian spas and wellness centers may offer. Luxury offers might be developed too. Russian luxury market will stay in spite of crisis (Kaufmann et al., 2012).

Russian tourists, believed that their stay in Slovenia may be improved in several categories, among the most popular were organization of services and price (e.g. see Table 3.3.3.; Figure 3.3.8.). This information corresponds with the opinion of Slovenian tourism stakeholders on the supply, who criticized the management the most (Gomezelj Omerzel, 2011).

Poor organization of services may significantly lower customer`s satisfaction. The tools like 5 gaps and customer journey mentioned above give opportunity to recognize the problem. Service questionnaire can provide managers with needed information as well. After the gaps are known, the service must be rearranged for the tourists benefit, meaning that every confusing and unpleasant experiences must be minimized. It may also concern expenditure of the range of services. Managers must also revise pricing policy and

accordance of price and quality. Some discounts or packages can be offered or the existing services must receive additional value, thus tourists will feel that the experience was worth the money they have paid.

Overall, monitoring quality provides managers with valuable information needed for decision-making and further improvement. The PDCA circle is one of the instruments, which might be used as well.

Destination development (Destination planning, Brand identity, Regional development, Regular monitoring and evaluating)

It is important that vision, mission, strategy and brand identity of Slovenia as tourism destination was developed in cooperation with opinion leaders (Konecnik Ruzzier, 2012), but it is also recommended to include local community in such a process. The branding campaign cannot be successful if community residents do not support the brand and do not live it (Illing et al., 2014).

Slovenia is not a big country; meanwhile it is divided by 12 regions, which differ from each other significantly, so it may be reasonable to have regional development strategy (includes infrastructure, ecology, economy and social component) for every region separately.

To sum up, there are ten elements of competitiveness that must be regularly monitored and evaluated: physiography and climate, culture and history, mix of activities, tourism superstructure, awareness/image, special events, entertainment, infrastructure, accessibility, positioning/branding (Illing et al., 2014).

Macro environment

Slovenia as every wellness destination exists in the macro environment, which requires systematic monitoring. This will allow proactive measures in preventing potential problems at the destination level.

According to the research results, the main research question whether Russian tourists find Slovenia as a satisfactory and competitive spa, wellness and health tourism destination with still unreleased potential and possibility to gain bigger percentage of

Russian market was answered positively. However, it also implies continuous work in the destination management and the destination development.

CONCLUSION

Russian Federation citizens are a new market for international tourism industry, which has appeared just 26 years ago. Almost immediately Russian market became desirable for most touristic destinations. However, this market is very complicated, heterogeneous and not widely explored.

This paper collected the thematic literature, concerning overview of Slovenia as a competitive tourism destination, its health, wellness and spa resources, Russian tourists` traveling statistics, Russian consumers` market segmentation and modern trends.

While Russian customers are researched in general, spa and wellness Russian tourists are not yet well explored, as these types of tourism are quite new to Russians. In order to contribute to this sphere the research of Russian spa, wellness and health market in Slovenia was prepared. The study included 103 Russian participants, who shared their opinion about spa/wellness or health experiences in Slovenia. Thus, the research met the aim of exploring the competitiveness of Slovenia as spa, wellness and health destination for Russian market.

The analysis of the research results shows that the main research question whether Russian tourists find Slovenia as a satisfactory and competitive spa, wellness and health tourism destination with still unreleased potential and possibility to gain bigger percentage of Russian market can be answered positively.

Altogether, the research showed that nature and climate, safety and atmosphere, health, spa and wellness services are competitive advantage of Slovenia, according to Russian tourists. This information matches with the self-identification research of opinion leaders, what means that the opinion of supply and receiver sides are identical in this question.

The research did identify the following competitiveness problems: low level of staff education, weak management, not always good enough quality of service and price to quality ratio, what mostly corresponds with the opinion of researchers on Slovenia competitiveness.

Recommendations on following criteria were offered:

- Endowed resources (monitoring the state of nature and its resource; wellness and culture package offer; traditional treatments and rituals offer; further attraction of Russian market based on good reputation of the destination)
- Quality of services (variety of tools useful for measuring quality of services)
- Staff (trainings and language courses essential for staff competencies)
- Development areas (the most favorable market to target; future researches needed; development of hospitality and sustainable development strategy)
- Destination management (collaborative advantage; new products development; change in marketing message; improving service organization and price policy)
- Destination development (branding campaign; regional development; regular monitoring and evaluating of the elements of competitiveness)
- Macro environment (systematic monitoring of society, economy, politics, ecology and technology).

Modern Russian consumers' reactions show that full convergence of West and Russian markets is rather unlikely. Therefore, future Russian market researches will be needed as more and more complex layers of Russian cultural change and hence consumption styles will form.

Following studies may explore Russian spa, wellness and health markets in different destinations and assess the competitiveness of a tourism destination. Other market like German or Italian in Slovenia could be researched in similar way. Qualitative analysis for needs, motivations and behavior of Russian tourists in Slovenia is needed. Demand for new trends like authenticity in wellness destination may be done.

Overall, although this Thesis only focused on one health tourism destination (Slovenia) and one market (Russians), many of the recommendations could also be extremely useful

for other health tourism destinations hoping to attract and retain Russian health tourists, and for any health tourism destinations hoping to be more competitive in the future.

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RESÜMEE

SLOVEENIA – VENE TURU SPAA-, WELLNESS'I- JA TERVISETURISMI SIHTKOHT Sakalova Katsiaryna

Pärast Nõukogude Liidu lagunemist 1991. Aastal, sai turismisektor uue turu – Venemaa. Nüüdseks 26. aasta möödudes pole see turg ikka veel täielikult avastatud, mõistetud selle mitmetahulisust, keerukust ja ajaloolist fenomeni. On tuntud teadmine, et Venemaa külastajad on eelistatud paljudes turismisihtkohtades, seetõttu on oluline jätkata uuringuid Venemaalt pärit puhkajate sotsioloogias, nende soove, vajadusi ja käitumist turismisektoris. Igat mitte-jälgitud ja mitte-kontrollitud turgu ja sealt pärit külastajaid on raske, kui mitte võimatu hoida või meelitada oma sihtkohta. Seda tuleb sügavuti uurida ja analüüsida, et olukorda parandada ja arendada. Probleemist lähtuvalt on käesolev uurimistöökäsitlemas põhiomadusi Sloveenia spaaturul suunatud venelastele.

Antud töö eemärkideks on:

- 1) anda ülevaade Sloveenia spaa-, wellness'i- ja terviseturismi hetkeolukorrast;
- 2) mõista Venemaa turistide puhkuse sotsioloogiat ja kliendikäitumist;
- 3) viia läbi venelastele suunatud uuring spaa, wellness'i ja terviseturismi eelistustest Sloveenias.

Uuringumeetodid, mida kasutati, olid teoreetiline ja statistiline analüüs ning küsimustik. Magistritöö koosneb kolmest peatükist. Esimene ja teine peatükk on teoreetilised, mis hõlmavad endas Sloveenia, kui spaa-, wellness'i- ja terviseturismisihtkohana, statistikalist informatsiooni vene turistidest Sloveenias ja vene klientide üldist motivatsiooni, vajadusi, elustiili ja klienditüüpe. Kolmas peatükk keskendub uuringu osale, milles tuuakse välja „Vene spaa, wellness'i ja terviseturistid Sloveenias“ küsimustikust selgunud tulemused.

Tulemused näitavad, et hüpotees „Vene turistid peavad Sloveeniat meeldivaks ja konkurentsivõimeliseks spaa- wellness'i- ja terviseturismi sihtkohaks, jättes osa potentsiaali sellest kasutamata, ning Venemaa turul tuntuse kasvatamine on võimalik,“ leidis kinnitust. Selle baasil on magistritöös toodud välja mõned edasised arenguvõimalused spaa/wellness ja terviseturismi kohandamisele vene turule.

Antud magistritöö annab edasi olulist informatsiooni vene klientide käitumisest üldiselt, kui ka sealhulgas ülevaate spaa/wellness'i ja terviseturistide käitumisest Sloveenias, mis omakorda võimaldab mõista hetkeolukorda ja turul toimuvat, kontrollida võimalusi ja turgu paremini ning luua uusi arengustrateegiaid.

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