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**AN ANALYSIS OF RUSSIAN-SPEAKING  
GUESTS: EXPERIENCE OF ESTONIAN SPAS**

Master Thesis

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## INTRODUCTION

Prior to defining and elaborating on the concepts that will be used in this thesis, it is vital to explain why the particular topic for the research was chosen by the author. According to the trends of globalization all over the world which very closely touch the sphere of hospitality, there is a necessity to coordinate the business activity by understanding the special features of international customers. While spas are nowadays developing very fast, people from many countries are interested in them. However different nationalities have their own opinion and perception about how the spa servicescapes should be organized. That is why there is a general opinion that it is important to develop the flexible service schemes which can be adopted by spas and used for the wide variety of customers' groups.

There are many theoretical frameworks which explain how different cultures give different meanings to the relationships among people. This includes the meaning which they give to some elements of the environment as well while building the interaction with the other members of the activities. Furthermore, a lot of works are written about the recognition and respect for the cultural differences. This became a very popular topic in the international relations too during the world-wide processes of self-recognition and cultural wars between different countries. However, the topic cannot be finished only by supporting the stereotypical views about cultures. The international companies cannot be oriented and directed only by the stereotypes which are so deeply rooted in the society's beliefs. So, the new research has to be conducted to understand how these differences can be reconciled (Trompenaars, 2003).

This Master's thesis topic is "An analysis of Russian-speaking Guests: Experience of Estonian Spas". The author of this paper accomplished her training period of the internship placement in Pühajärve Spa and Holiday Resort and decided to take the sample from this

experience for the particular study. Concerning the current study, there are several objectives that have been chosen for this particular research. They include:

1. According to the critical reading review, one of the main objectives is to analyze the importance of Russian-speaking tourists' target market in the Wellness and Spa Industry in Estonia.
2. It can be useful to evaluate the differences in the Wellness and Spa Supply of products and services in Estonia, as there can be noticed some kind of traditions and regularities of the Estonian Wellness providers.
3. As a demand matter the Russian-speaking visitors' expectations and needs are of the interest for the author of this thesis.
4. As a result of this particular study, it is necessary to make the recommendations for Estonian spas in general about the maintaining the Russian-speaking target market.

It is interesting to analyze does the customer choice depend on the nationality and cultural background and how it affects the customer's satisfaction of service. Based on such knowledge the spa employees may better understand which exactly meaning they bring to a customer and which result they want to achieve from the interaction with a client. What needs to be changed? According to Trompenaars (2003) all the change processes have one similarity in the need for diagnosis of the existing value system and comparing it with the ideal value system. While the values are created by interactions between human actors and this is an ongoing process, the companies are striving for the development and perfection.

The hypothesis for the research is following: Russian-speaking target market matters to the Wellness and Spa Sector in Estonia. The cultural differences give a challenge for the spa companies' service providers to guarantee the high-quality standards for the international clientele. However, the Estonian and Russian people always have had the long historical bonds which still are developing. The author of this thesis decided to take this particular target market because of apparent similarity of the Estonian and Russian traditions concerning the health tourism. However, while these countries seem to be very close in their historical development, some differences can be found during the study which targets the expectations and experiences of Russian-speaking people in Estonia.

All the aspects of service process in the spa company with which consumer can interact (e.g. its personnel, its physical facilities, and other visible elements) can cause the different results (Bitner, Booms and Tetreault 1990, p.72). Because of the limitation of the study

size it was decided to embrace only customers from Russia, Ukraine and Belorussia during the research. Furthermore, such kind of focus could help the researcher to have a deeper insight to the countries which are close to each other historically, geographically and socially, but to analyze do Russian customers play an important role to the Estonian spa service providers and are they striving to develop the cooperation with this particular segment.

For the better accomplishment of this research the author decided to take several tasks for this study:

- *Analysis of the thematic literature.* It is important to analyze the previous works of different researches who especially paid attention to this particular problem of reconciling the cultural differences before conducting your own research. Based on the conversations with the supervisor, the literature topics necessary for the conduction of this research can include articles, books and publications about the different traditions of the Russian-speaking countries and Nordic states concerning the Wellness and Spa services, general materials about the wellness development theories, different expectations of the customers about the service in spa, Russian-speaking target market issues importance in Estonia.
- *Creating the questionnaire for the Russian-speaking tourists coming to Estonian spas.* Formulation of questions necessary for conducting the research, its selection, its translation into necessary work languages.
- *The carrying out of the questionnaire in the Pühajärve Spa and Holiday Resort.* Depending on the aims of the research finding the useful ambiance to collect the data.
- *Choice of the research methods and its justification.* The main method which will be used in this paper is the questionnaire for the Russian-speaking customers from Russia, Ukraine, Belorussia, concerning their experience in Estonian spas.
- *Preparation and conduction of the research and making conclusions of the research.* Finding of the respondents for the survey provided and the interviewees, taking notes and making first assumptions concerning the preliminary results. Analysis of the results of the survey and making conclusions
- *Collecting the results and processing the data.* Processing of the survey and interview results, taking all the used data into consideration and making final conclusions depending on the research aim.

Research methods which were used are:

- Theoretical analysis and literature review.
- Self-administered survey approach.
- Discussion and questionnaire results' analysis for making the recommendations for the future.

The paper consists of three main chapters where every of them is divided into the two subchapters. The first chapter describes the theoretical approaches of the Wellness and Spa development all over the world. The first subchapter is about the supply of the Wellness and Spa products which are offered nowadays and becoming the new trends for the industry development. On the contrary, the second one talks about the demand which is expressed by the customers who from the global market for the particular sphere. The second chapter provides the overview of the Spa industry in Estonia and such countries as Russia, Ukraine and Belorussia and the detailed process of the research accomplishment by the author of this thesis. The first subchapter plays an important role for the aims of this study because it makes it clear that the countries with the close historical and cultural bonds can be very different concerning the health tourism and spa industry trends. Here the theoretical knowledge is mixed together with the results and information which were collected during the present study. The third chapter brings together the theory which was used and reviewed in the first two chapters and applies it to the real data analysis. According to these conclusions, the recommendations are given for the global Estonian spa market concerning the Russian-speaking customers' profiles and needs.

All in all, this Master's thesis includes the theoretical and empirical study. The paper has an introduction, main body, conclusion, 53 references, 6 appendices and a summary (Резюме). The empirical study's results are shown by the 8 figures and 3 tables created and adapted by the author.

The author of this thesis would like to thank her supervisor, Melanie Kay Smith, PhD, for her professional guidance supporting and encouraging the author to write and complete this Master's thesis.

# **1. THEORETICAL APPROACH OF WELLNESS AND SPA DEVELOPMENT: SERVICES AND EXPERIENCES**

## **1.1 Supply of the Wellness and Spa Industry Products**

Because of the absence of the clear definition of the term spa tourism, and the wide variance of what constitutes a spa there is even much more confusion among the spa industry providers. Some of the spa hotels claim that water is a fundamental component to every spa, while others don't pay so much attention on it in the definition. Some of the spas decided to provide health-focused services where the emphasis is on health maintenance and illness prevention including exercise, healthy eating diet, and relaxation especially for enhancing the balance between body, mind and soul. There is another definition which is quite arguable that spa means: "a place geographically based on mineral or thermal springs or seawater, or a fitness club that offers a variety of treatments, services, and facilities aimed at achieving medicinal or leisure benefits for its clients." This definition includes the three main components of spas: location, facilities and procedures provided, and the reason for visiting. Jenner and Smith (2000) claimed that the visits to spas are one of the earliest forms of health tourism. Spas were created to use the healing properties of such treatments the thousands of years ago, and they became an important part of the social structure in different cultures (Vierville, 2003; Spaa, 2002).

The usage of therapeutic baths got such popularity that it became of one the most important element of medical spas. Furthermore, public interest in baths began to peak during the last ten years and they were included in the spa menu of bigger spas, not only in medical ones, but also in wellness hotels for relaxation and elimination of stress (Spaa, 2002). Nowadays the value of prevention of the illnesses, healthy lifestyles, and relaxation has found its place in the spas to address these needs of a modern society (Register, 2005).

The Kentucky-based International Spa Association (ISPA), a professional organization which was founded in 1991, has been recognized worldwide as the voice of the spa industry, representing more than 3,200 health and wellness-oriented facilities and providers in 83 countries. This organization aims at advance of the spa industry by providing invaluable educational and networking opportunities, which are based on promoting the value of the spa experience. Therefore the specialists of this organization don't mention water in definition of spa, arguing that "a spa serves as an educational and cultural institution that promotes and integrates individual wellness, health and fitness as well as social well-being, harmony and balance through wellness, prevention, therapy and rehabilitation of body, mind and soul" (Loveseed, 1998, p. 48). Seven years later, the ISPA offered an all-encompassing, holistic definition, declaring that spas are "devoted to enhancing overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit" (Mintel, 2005). The summary for the term spa tourism can be following: "Spa tourism which focuses on the relaxation or healing of the body using mainly water-based treatments; such as, mineral or thermal pools, steam rooms; and saunas. Emphasis tends to be focused on curing, rehabilitating, or resting the body." (Smith and Puczkó, 2009, p. 85)

All in all, today's spa is a place where people can get the healing and nourishing treatments for their mind, body, and spirit. Tourists name several reasons for the spa visiting; they include fitness exercises, stress management, relaxation of mind, pampering and pleasure, medical treatments for restoring health and wellness. The modern spa is an interesting combination of ancient traditions and modern mechanical wonders. However, the heart of the modern spa, just as the ancient spa, is water and the rituals that evolve around it. The Wellness and Spa industry is going forward in its progress and spread, people from all over the world are becoming involved in these processes. The new groups of the stakeholders arouse. Nowadays Health and Wellness tourism accumulates quite big sums of money and people have to take difficult decisions about the aims for which these money can be used.

During the past ten years the worldwide spa industry has grown significantly which is worth in the region of US \$40 billion (Haden, 2007). There is a clear vision that if the interest of people in leisure facilities is aroused more than before, then it proves that customers are looking for more than simple relaxation during a holiday (Lynch, 2002). Harmsworth (2004, p. 173) declares that "the spa market is one of the fastest growing leisure sectors, where societal trends and aspirations find instant reflection in the developments on both the demand and supply sides. The market is divided, each segment



catering for different customer needs, which continuously change in line with social and lifestyle changes.” While the academic study and researches about the spa industry has progressed, spas have become a target for the sophisticated consumer groups.

However, there is a need to classify the spa tourists while the descriptions of them are very limited in terms of who they are and what motives and factors are behind their visit (Tawil, 2011). Previous research about the spa tourists groups was focused on their classification based on the reasons why they visit spas. Such studies were mostly connected with the behaviors and attitudes of people which affected their interest to take the small holiday and have some rest. Nowadays for the managers of the spa hotels it is more interesting what are the motives and/or factors which became the incentives for the customers’ choice of the particular spa, how they are choosing the treatments which the hotels offer and how it affects their experiences and satisfaction.

The awareness of the modern people about their health conditions and the restoration of health can indicate that the society is changing towards a new life style which gives the new possibilities as well as creates challenges for the spa service providers. Needless to say, that the opinion about the term “health” has also changed significantly. Now the experts tell that the “health is not understood as the mere absence of disease any more, but as a philosophy of life and a worthwhile goal for life and everyday” (cited in Fontanari and Kern, 2003, p. 20). This change in attitudes concerning the health is developed by the work of Messerli and Oyama (2004), where they quote the Hamburg-based trend watcher Matthias Horx, “Never before in the history of humankind has health been so highly valued. Health no longer means the absence of disease, but indicates an active lifestyle choice aimed at combating stress and, increasingly, countering psychological problems.” There are many considerations about the health term’s understanding, and one of them says that “Health is the extent to which an individual or a group is able to realize aspirations and satisfy needs, and to change or cope with the environment. It is a resource for everyday life, not the objective of living; it is a positive concept, emphasizing social and personal resources as well as physical capabilities” (Smith and Puczkó, 2009, p. 40)

Because of the new demands and expectations of the world travelers, the spa business started to boom very fast. According to Harmsworth (2004) if the visit to a spa was successful, up to 90% of clients have returned for an extra visit. Messerli and Oyama (2004) made a research that the visitors are looking for some new and meaningful experiences which can bring the uniqueness to their life. The spa client nowadays is well

informed, more quality conscious, independent, and harder to entertain and satisfied. Furthermore, these factors and some more, including better health awareness, challenge for the usage of alternative therapies, and better environmental and psychological awareness, that enhance demand for spa travelling addressing the need for time out, rejuvenation, and deeper experience (Grihault, 2007). In order to response to such challenges created by the sophisticated customers, the service providers have to be updated with the newest trends concerning the development of Wellness and Spa Industry. There is a strategy which is taken by many huge international companies where the main focus is given to the exceeding of the customers' expectations (e.g. Disney, Ritz-Carlton, Singapore Airlines, Four Seasons and others). The main point is to pay attention to every client's comment and even hint which the professional staff is taught to catch from the customer. Different methods of the employees' empowerment are used in order to encourage staff to improve the quality of services. For example, Ritz-Carlton can provide any employee with up to \$2,000 to rectify a problem or exceed a customer's expectations (Solnet, Kandampully and Kralj, 2010).

There are several key factors for the successful spa development which are described by Langvinienė and Sekliuckienė (2009). They include the presence of the good location with lots of facilities and the mixture of the beautiful landmarks and natural attractions, different types of accommodation which can be organized by the service provider of resort spa, and the great variety of services located near the spa: health packages with treatments, accessibility to medical spa procedures or wellness spa. The secondary influence factors can be grouped in such a way: personalized programs, which are usually made according to the customer's wishes and his/her health conditions, a wide choice of treatments in menu, and others. Some research about the Russian-speaking countries show, that there is a need for further development of spas based on the world wellness and spa trends, clearer customers' profiles and more individualized treatment packages. Spa services are not limited by new entrants to this sphere. There are a lot of differences in realizing the marketing techniques of a medical spa services and a wellness spa. Leisure services of wellness spa suppliers are getting its popularity during the recent years. This is why the leisure culture and traditions are becoming increasingly important to understand and learn.

There are several considerations about the definition of the term "customer". First of all, the terms "customer" - someone to be served - and "citizen-consumer" more likely to represent the welfare service users (Clarke, Cochrane and McLaughlin, 1994). A little bit different approach was offered by Kettl (1997) explaining customer as a preferable to the

concept of the client - someone to be managed. The relationship between the customers and the service provider is always a complex one because of many points of interaction. It is important to see how the expected quality of service will be reflected during the service encounter. This concerns the different service spheres, thus, in this particular thesis the author would like to go into the hospitality and spa services deeper. If the customer feels that the experience which he got is better than expectations it causes the higher levels of satisfaction (Wirtz and Bateson, 1995), and on the contrary the performance worse than expectations results in customer dissatisfaction. Customers are the main reason of the services development. They participate to some degree in the production of the service.

Customers' perceived value is also an important factor which affects customer satisfaction, the image of the hotel, and further recommendations of the organization by the customer to others. This is a proved fact that customer satisfaction could positively affect corporate image (Hu (Sunny), Kandampully, Juwaheer, 2009). Moreover, a more favorable image of the firm can cause a positive reaction from the customers in their choice. However, it should be added that the activities which are devoted to only satisfying customers may not be sufficient in a strong competition. Executive management has to target on improving the customer perceptions of overall service quality and enhancing the clients' perceived value and not only trying to improve the customers' satisfaction levels.

Personalization is a very important concept nowadays. Many spa service providers can boast that their services and treatments are highly personalized and individually chosen. Mittal and Lassar (1996) described a "personalization" factor which plays a role of socialization during the interaction between service employees and their customers. In their study this factor was delivered as the most important determinant of perceived service quality and of customer satisfaction while service encounter with customers is quite interactive.

Hartline and Ferrell (1996) pointed out several other elements which form the holistic customer experience including friendliness, enthusiasm and attentiveness of service providers. The service provider's efforts to satisfy the customers can be related to Parasuraman, Zeithaml and Berry's (1988) empathy dimension. The intrinsic motivation of the employee goes from the job satisfaction, and the better-motivated staff can be more successful and friendly with the clients (Mohr and Bitner, 1995). But the scientists noticed some kind of contradiction while Mohr and Bitner's (1995) declared that if the service provider didn't work adequately for the customers, they were never satisfied, however

sometimes very high efforts of employees also don't guarantee satisfaction of the customers.

Mostly, it is common for potential customers of hospitality industry to seek out the opinions of previous customers during the process of purchasing decision, and this process is being facilitated by many hospitality and tourism related websites that can provide clients with all the necessary information. Such reaction is explained by the intuitive awareness of prospective customers about the word-of-mouth recommendations which are fuelled by previous satisfactory experiences for their fellow consumers (Solnet, Kandampully and Kralj, 2010). Customers also believe that these described experiences are in part a reflection of an organization's attitude to its clientele.

## **1.2 The demand for the Wellness and Spa Services**

The new kind of tourist wants to get higher-standard experiences, faster service, variable choice, social responsibility and better satisfaction of all his needs, including the need in pampering. This doesn't depend on the types of tourism. The fluid identity emerges in the area of domestic tourism as well as the international travel. There are more possibilities now to have a holiday even in the 5 star resorts. While the Earth is affected by the lack of useful resources a mindset of a great generation of tourists starts to behave in a different way.

The first ideas which found the reflection in book of Yan Yeoman (2012) were described by the author in his article "Tomorrow's tourist: fluid and simple identities" (Yeoman, 2010) where he paid a more detailed attention to the future tourist as the new kind of personality which is needed for tourism to continue its progress. While the tourism became the global trend and there appeared more wealthy people around the globe people got the opportunity to take a holiday break in any place in the world, even the abnormal and obviously very expensive day trip into outer space with Virgin Galactic. The scientist describes the new identity which is called fluid identity meaning that the people become more interested in the unusual experiences, bigger money expenditures in return to luxury, higher living standards together with the better quality of life, where tourism plays an important role. The main feature of this concept is that such kind of identity is not defined by boundaries of the choice concerning the consumption of tourism products and services. In contrast, while the wealth decreases then this identity becomes simpler. There is again a new desire for getting something simpler appears.

The differences in the society's income rates arouse the challenge for the balance of power in tourism. The tourist is the power base which becomes an engine for the global tourism development, adaptation and changes. There is no mystery that every tourism provider wants the improvements in his sphere year by year. But in reality there are much more hurdles which can cause problems for tourism. The newer type of the clientele for this sphere can cause different misunderstandings and difficulties in the relations with the tourism service provider.

Another important feature of the fluid identity is that it is very hard to understand which class the person belongs to as the human relationships are not restricted by such elements as the birth, family belonging, but the most important is the complex of features which the person gets during his life cycle through education, income rates and influence of modern travel and pampering which helps to broaden people's choices.

The international travelling is becoming more than just couple of days' holiday, while the time of a visit is mostly prolonged, and people would like to have a deeper insight into the culture of destinations. As it was noticed above longevity is a key notion associated with fluid identity while people understand that if they lead healthy life style and live longer, their experience choice is broadening and bring more satisfaction and life enjoyment. The parents of nowadays tourists could not afford such experiences as they can try now or want to do. And connected with the sense of longevity they will search for experiences which will restore their health and return their beauty and powers. The growing middle classes of the world can now afford luxury and they are eager to pay for getting the things of their dreams.

Health and medical tourism is the important trend in this rush for the rejuvenating mind, body and soul. According to these trends (Yeoman, Introduction, 2012) people also got the chance to reconsider their lives and ask the question to themselves who they are. They would like to try the new unusual conditions and their reactions in adaptation to this unknown ambience. There are two kinds of the desire for travelling. One level is the form of escapism, where people would like to have small breaks from their works and relax. At another level, tourists are interested in ethnicity and there is a demand for something simple in a sense of tourism premises and attractions. This creates a new challenge for the stakeholders where they have to decide how to find a balance which will include both of these visions into one system.

Another concept is the growing interest of tourists for bargains, so called economic term - mercurial consumption, the last minute offers can be ordered everywhere and in different spheres, starting from the designer clothes and till the airplane tickets sales.

There is a quite high demand in the spa resorts too nowadays. It is explained by the attractiveness of the areas which are located far from the largest cities and give people the feeling of freedom and peace to enjoy the natural beauty and the complete relaxation. Resort spa can be called as the one of the largest sub-categories of the spa industry in the list after the day spa. The destination and medical spa sub-classes are taking the next position after the resort spa. Travelers, who are coming to a resort spa, are not directed by the pure necessity or some kind of health problems, but they have in mind the idea about the relaxation, leisure activities and having a break from their every day routine. There are no limits for them to relax as they used to do it at home, but sometimes even in the higher proportions. They can sleep till the midday, eat not very healthy food, but the one which help them to enjoy their holidays, attend fitness classes and have different types of relaxing treatments only for the pampering.

The customers are eager to take part in many recreational and social activities which are provided on the resorts. The variety of medical services is usually not needed inside the resort spa centre. However, there should be the accessibility to conventional medicine if the clients ask. The supplier has to think about the possibility to provide such services if the customers express such a demand. While the relaxation and pampering are given the primary role, the small choice of medical treatments can be an additional attraction for visitors of the resort spa. The majority of resort spas usually include the traditional services and treatments in their menu. Their offer can have such activities as traditional massage therapy, physiotherapy, osteopathy, programs to stop smoking, weight management, and others.

There also some interesting ideas (Langviniene, Sekliuckiene, 2009) about the necessary promotion tools for the spa resort. The authors emphasize that it should start from involving the small children who are coming to resorts with parents in the wellness and spa education. It is explained by the consideration that these children will become the new generation of the spa and wellness services consumers. The same education can be provided for men while they are still the smallest part of users of the spa services. The correct explanation of the use of spa services can attract men to visit spas more often and exclude the feeling of feminine activities types. The last attribute to describe the resorts spa

is a price. A pricing have to arouse people's interest and be an attractive tool for tourists who would like to broaden their knowledge about the leisure services. Sophisticated clients are eager to use additional services for extra charge.

Weiermair and Mathies (2004) give the list of the main elements of a resort spa according to the basic concept:

1. Professionals (sport scientists, beauticians, nutrition scientists).
2. Programs (diet, fitness package, peeling).
3. Facilities (sauna, wellness centers, hotels).
4. Wellness bricks. These are the elements which are related to specialization: medical or wellness spa. However, there is a trend nowadays for the mixed medical-wellness hotels, resorts and spa, because they have to meet the challenges which appear from the educated customers.

Changes in profile of a client also have different results concerning the spa development. Usually for the last decades of the 20th century the majority of clients were women. The age categories included middle aged and elderly people. Hence, the latest researches (Langviniene, Sekliuckiene, 2009) show that the number of younger (less than 30 years old) users of wellness premises increased greatly. The gender changes and priorities are obvious as well. The number of male clients is increasing year by year. Technology innovation helps to collect necessary information about consumers, in order to be better familiar with their preferences, wishes and expectations. This provides the better possibilities for providing the personalized services according to the desires of every individual.

As it was notice above women were usually the primary users of spas. However, the last surveys have shown that men got an important niche in the international spa market. Such changes have created a necessity to offer special treatments made and designed especially for this part of the clientele. The usual age of the spa users who form the core consumer base for the world spa tourism industry is about 45-60 years old, so called the Baby Boomer generation. The global spa industry can be divided into two big sectors which are grouped according to the visitation aims of the clients. The first market group consists of people whose primary goal is to maintain their health conditions and recover from some kind of diseases. The second segment includes those visitors who are seeking more

differentiated forms of tourism, including the obsession with better well being, beauty, recreation, and stress elimination. That is why the spa sectors are sometimes divided as the wellness and medical sectors.

The new challenge for the spa industry is to continue to transform the spa industry from the only medical sphere to the active form of health tourism and provide people with new experiences. However, the initial literature about spa tourism was describing itself as a small segment of health and medical tourism, while not to provide implications for the further research where the spa tourism will play the main role. The study of Tawil (2011) has revealed the certain types of the spa tourists. He created several categories which can explain some characteristics of the spa clients according to their behavioral patterns and their wishes and expectations of the spas where they spend their holidays.

First of all, the group called Aristocrats is mostly older rich people with the primary purpose to have some rest and relaxation or have a rehabilitation period after it was recommended by their doctors. The well-established facilities and treatments of a best quality are very important for them. They are always neat, and attentive to smaller details including the holistic design of the spa and its cleanliness. From such details their satisfaction depends. When making their choice, they mostly pay attention to the official advertisements to the Web sites of the hotels but the word of mouth they usually put under question.

The second group is Explorers who are interested in the whole spa service experience. They are not against to travel by their own, and their choice depends on the uniqueness of the hotel's or resort's location. These people are eager to find new interesting adventures, and they are not afraid of trying something unusual.

The Socialisers like to travel or to be surrounded by the group of other people. The study says that they are mostly females who would like to get the best quality service and who are paying attention to other people's suggestions. They are looking for well-developed facilities such as different types of massages and other treatments, fancy restaurants, modern cafes, and healthy food.

The Budgeters are relatively young and they are dependent on their financial circumstances. They would like to find affordable spas and treatments such as massage and swimming pools. They usually don't travel too far from their homes.



However, the author (Tawil, 2011) claimed that the data was not enough for the complete study and he suggested that his classification of spa tourists could be developed better during the next research. The biggest limitation for this broader study was that the motives and factors for the people's visit were based on a single dimension and were constructed using quantitative market research, which may be not as informative as it is needed.

There are national differences in the concepts of spa also. The American wellness resorts are mostly directed to the pure relaxation and pampering. While European spas show the demand firstly to improve the health conditions of people or prevent the disease. However, the division for the medical and wellness spa categories has become similar for East and West quite recently. Customers of wellness resorts are free to choose all services that are provided on the resort, they can be included into the package or some of them can be ordered by extra charge. The clients of medical spa resorts have to consult the doctors in order to select the procedures which will be beneficial for their health and will not include any contradictions according their medical recommendations.

There are several elements that were described by the authors (Langvinienė, Sekliuckienė, 2009) useful for the wellness resorts:

1. Resort wellness and spa services firstly use the attractions of the natural surroundings of the area as the main element of spa ambience and relaxation.
2. Comfortable accommodations are the second matter which should be accessible to the customers.
3. The choice of spa services of different types is provided on the territory of the hotel in spa resort.

The extra factors of influence for the successful development were named as supplementary attributes, including the modern facilities, and opportunities for additional activities on the resort. Some of the recommendations for the spa managements are described as improving the quality of wellness and spa services based on the contemporary concepts and world trends, maintaining a staff, focusing on popular traditional treatment services those like classic massages, bath procedures, balneology therapy, and others. All these can help to respond adequately to the customers' needs concerning their wellness leisure time spending.

## **2. THE SPA INDUSTRY IN ESTONIA AND RUSSIAN-SPEAKING COUNTRIES**

### **2.1. Background of the Wellness and Spa industries in Estonia and Russian-speaking countries**

The Baltic countries (Estonia, Latvia, and Lithuania) all have a long tradition of health and wellness tourism which has more similarities with Central and Eastern Europe and Russia than with Scandinavia. There are many traditional thermal baths, rehabilitation centers and sanatoriums, the majority of which are located on the Baltic Sea coast. All these resorts and health centers are used for healing as well as leisure and the number of Russian and Russian-speaking guests visiting the resorts is increasing very fast. The deals of buying the properties are also popular nowadays in these regions. Apparently, no other country has as many spa hotels per capita than Estonia at more than 40 and still developing.

The Estonian SPA Association implemented a quality system for medical spa hotels in 2008 which was extended to wellness spas and centers in 2012 (Estonian spas, 2011). Concerning the current study of this particular thesis it is necessary to make a small introduction to the history of the spa development practices in Estonia. Many considerations of health and wellness as a concept created different understandings of these terms all around the world for different cultures. Concerning the Russian-speaking countries and the Baltic States, the term health is closely related to physical and medical healing. Such kind of traditional interpretation has been followed by the development of the medical tourism in Estonia. The spas were mostly connected to the popular resorts in Estonia. In 1820, Doctor Carl Abraham Hunnius started to work as a county physician in Haapsalu. During the years when he was treating his patients, he learnt about popular medicine and the healing properties of sea mud. He tested the new method of mud therapy

which was called pelotherapy on his relatives and patients, and got the positive results. In 1825 the first hydro and pelotherapy establishment was built on the coast of Eeslaht Bay at Haapsalu on the initiative of Doctor Hunnius.

Following this event, similar spas were built in Pärnu (1838), Saaremaa (1840), and Narva-Jõesuu (1872), with quite high numbers of visitors (Kallas, 2003). Haapsalu was recognized by the Russian czars, and members of the imperial household visited Haapsalu in 1852, 1856, 1857, 1859, and 1871 (Schlossmann, 1939). The czars Alexander I, Alexander II, Alexander III, and Nicholas II made some visits to Haapsalu to restore their health and enjoy the peace. Even the famous Russian composer Peter Tchaikovsky spent his summer in Haapsalu in 1867, where he composed part of his first opera “The Voyevoda” and the cycle of instrumental music “Souvenir de Hapsal”. The Russian painter Nicholas Roerich also devoted his well-known paintings “Beyond the Seas Are Great Lands and Varangian Sea” date from his last visit in 1910. Pärnu was included in the list of Russian imperial health resorts in 1890 and such great official recognition encouraged the Town Council to publish advertisements in the biggest newspapers in Moscow and St Petersburg (Kask, 2007).

Estonia in its turn has been an important route for the trade between Europe and Russia (Jesse, Kruuda, 2006). During the 50 years of relative isolation behind the Iron Curtain Estonia’s economic and political position was quite unstable. However, the recent changes gave this country a chance to re-establish its historical relations with the west. The Estonian health system got the opportunity to enhance its quality while using the new medicines and technologies which were available through the connections with other European countries. The borders were opened for professional cooperation also in different spheres, including tourism, trade and medicine. Estonia became a popular destination for the nearest Scandinavian countries to which the prices of Estonian medical services were relatively low and this attracted people from other neighbor countries to start the health tourism wave to Estonia.

Historically, Estonia has closer cultural ties to the northern neighbor Finland. One of the main similarities is the same linguistic group. Estonian language is different from other Baltic languages. Helsinki is very close to Tallinn and can be easily reached by ferry. In comparison, the capital of Latvia, Riga, is 307 km distant from Tallinn and 395 km from St Petersburg in Russia. According to the Estonian tourist board, the Finnish tourists flow is very high bringing about 70 percent foreign tourists to Estonia. Close distance and lower

prices are good motivational factors for the Finnish people. In 2003, Estonia had to 3.4 million foreign tourists including 53% from Finland and 12% from Latvia. Others were the Russian Federation, Sweden and Lithuania. When Estonia joined the European Union in May 2004, the tourism sphere gained about 20% in its rise compared to 2003.

Proximity, similar spa tradition, and reasonable costs were the main reasons which attracted above all elderly Finns; their number is increasing during the last years significantly. The resort management in Estonia is mostly given to the resorts' local business communities and public authorities, while a loyal staff and tourist base give to such microclusters (Kase et al. 2004) more opportunities of mobilization to involve external capital besides their own savings. The construction of second homes summer apartments, summer houses and villas provided the visitors with a closer connection with the destination. There are several elements which gave the possibility for the resort milieu development; however the main one is the systematic work of local authorities, who encouraged business people and house owners to invest in tourism infrastructure (Kask, Raagma, 2010).

While the spa tourism of Estonia is a sphere which is very attractive for the Finnish people, it is now its wave of success which embraces other neighboring countries. Low cost, high standards of care, and fast development of services bring to Estonia more and more foreign visitors from such countries as Finland, Russia, Latvia, and Sweden. The number of foreign visitors to Estonian spas has risen significantly from 12 000 in 1994 to 200 000 in 2004. During this period, most of the spas decided to modernize their services and provide the combination of medical spa treatments and wellness-oriented procedures. These made it possible to attract people not only to cure their diseases and restore the health, but also to coordinate the balance between mind, body and spirit by providing people the chance to prevent the illness and relax from the hectic life style. But the lack of information and the language barrier were the main barriers for the better promotion of the Estonian spa services for the foreign people.

In the last years the Russia was the highest rising foreign market in Estonia and it will continue to grow. Presumably, Russian tourist can be interested in cultural heritages, SPA and city tourism. It is important for the Wellness companies to understand that people's image of a destination is created by their general knowledge and feeling, on the other hand an external influence, such as friends and relatives or word-of-mouth is also relevant (Tooman, 2010). The Enterprise Estonia Foundation (EAS) is the representative body

responsible for implementing Estonian tourism policy. This organization has established the Turismiarenduskeskus (Tourism Development Centre), so called the Estonian Tourist Board (ETB). The goals of the ETB include marketing Estonia as a tourist destination, domestic tourism marketing, product development, market research of main target markets, development and administration of the national tourist information system and participation in the work of international organizations. There is the National Tourism Development Plan for 2007 - 2013 where the overall budget for tourism development is described (ca. 206 million Euros) and is mostly financed through EAS/ETB from EU structural funds and the state budget (Enterprise Estonia, 2010). The documents which describe the plans for the Estonian tourism development are the "Introduce Estonia" Brand Manual (2009) and "Introduce Estonia" sub-strategy of tourism instructions for the focus topic of a wellness holiday (2009). The strategy which EAS would like to develop in order to present Estonia as a travel destination includes four main topics - city holiday, cultural holiday, nature holiday and wellness holiday (Tooman, 2010). The particular research objective is to analyze deeper and promote the sphere of Wellness holiday image of Estonia for Russian-speaking clientele. Concerning the literature base there are still not enough theoretical materials for this specific topic.

One of the main research aims was to identify and compare the customs and traditions of Estonian and Russian-speaking countries in the sphere of hospitality and particularly in the Health tourism. That is why the author of this thesis wanted to find the greater insight into the several studies of foreign scientists concerning these issues. Among many articles the research of Swerdlow and Cummings (2000) presented the comparison of Western (particularly American) hospitality differences with the Russian hospitality sphere adaptation to the world trends in this sphere. After the political stage called perestroika the lodging industry in Russia has become a successful exception to the difficulties that business has faced. However, the distance between the Russian and Western hospitality sector still remained huge. When Western travel was developing quite fast, more foreign trade, and entrepreneurship have encouraged their success, while Russian economy had to make some changes in order to adapt to the new conditions.

During the communist movement Central and the Soviet Union's spas or thermal baths entered a new phase of development while many Western European spas were declining, with treatment mainly sponsored by the state or the trade unions in their specialized facilities. The democratization of access to the spas and a narrow specialization in medical treatment were the main distinctive features of the spas in those countries during that

period of time. The appearance of the spas was changed dramatically. A dominating feature of their physical planning became the trade-union rest houses, hotels and sanatoria. Spas became 'healing combinats' where people could use the mineral waters, climate and other local natural resources in order to restore their health. The accommodation facilities were typically large buildings with mineral water basins and healing devices, with a residential part, dining facilities and meeting halls. There were almost no other special services. The Baltic States, Central and Eastern Europe and Russia have much in common in terms of their traditions of medical thermal tourism, sanatoria and rehabilitation.

Concerning the hospitality traditions and the destination image of Russian-speaking countries, there is an interesting study of Professor Markel "The Destination Image of Ukraine: The Challenges and Breakthroughs in Ukraine's Hospitality Industry" (2012) which is based on the research of the cultural image of the destination. It is obvious that the Eastern Europe tourism is in a sense relatively young (Jansen-Verbeke, 1996). Because of the decades being under government control in the majority of Russian-speaking countries the hospitality industry there was not very fast developed. The borders were closed for the Western visitors. During the Soviet times the majority of tourist visitors lived in so-called "sanatoriums". These were some sort of hybrids between traditional hotels and rehabilitation facility where tourists could take some simple in-patient procedures such as mud-baths, massages, cold and hot showers, mineral baths and other treatments. These types of hospitality facilities were quite popular. While Estonia was included in the USSR, it had the similar sanatorium organizations which were well-known and used by many Russian tourists. Such kind of accommodations was "all-included" and usually was offered as packages with accommodations, meals, procedures and even entertainment (Light, 2000). Nowadays Eastern Europe's destination image is primarily directed to the cultural tourism sphere (Hudges & Allen, 2005). That is why Ukraine can be interested in the new wave of the hospitality traditions which are represented in Estonia.

Such kind of features has both advantages and disadvantages. One of the main advantages is that the cultural tourism can be extremely beneficial for countries' political and economical promotional reasons (Light, 2000). The research of Stepchenkova & Morrison (2006) investigated what destination image of Russia is projected via Internet. Specifically, they looked at tour operators' websites both Russian and foreign (American). The study results showed several important trends. First, it was very clear that the efforts of the Russia's promotion as a tourist destination on foreign markets were not enough and quite scarce. The disproportion of the advertisements of the well-known regions and less known

areas is very prominent. There can be found more information about the heritage and cultural tourism facilities than those of modern amenities.

There are some interesting facts which were unveiled in the study devoted to the developing Estonia as a Wellness destination (Tooman, 2010). First of all, it is still virtually unknown that Estonia has a reputation of a wellness destination. People from different countries better know about the Estonia's image as a medical spa holiday destination which is attractive by its price levels and medical premises. However, the future of the Estonia's image as a Wellness destination seems quite positive as foreign people see a high potential of this country to be a prestigious wellness holiday destination on the basis of "Introduce Estonia" sub-strategy of tourism Instructions. Hence, the joined actions of the specialists in Wellness sphere are needed to make the further progress possible. Nowadays the strategy is non-existent today (Tooman, 2010), while there are many contradictions and circumstances which can slow down the development of creating the image of Estonia as a Wellness destination.

While the author of this thesis would like to generalize the most popular Russian-speaking countries, there is something to be said about the Russia's neighboring country –Ukraine. There is a lot of underdeveloped potential for different kind of tourism in Ukraine. The scenic blend natural landscapes together with rich historical heritage make this country attractive for the adventure seekers. Moreover, Ukraine is increasingly becoming one of the most important European countries where a great variety of world events takes place. For example, the famous FIFA soccer championship was hold in Kiev, the capital of Ukraine in 2012. There are also the world's most successful hotel chains who would like to develop their business in this country, for example Hilton hotel chain. However, the tourism companies claim that there are a lot of issues to be done and solved in order the hospitality industry market could be better (Iarmolenko, 2011). That is why the cooperation of Ukraine and Estonia can be mutually valuable. While Ukraine is still seeking its niche in the tourism sphere, the experience of the faster developing partner can play a great role in such kind of orientation.

Lack of necessary informative sources for tourists and the good tourism development program are the main limitations on the way to build the successful destination image of Ukraine. However, if Ukraine pays more attention on the Estonian resorts' practices and provide the both-side exchange of the Wellness tourism specialists, the condition of the Tourism industry may change for better in these countries. On the other hand there can be

found few advantages if people don't have the clear destination image, because there are many opportunities to improve this image and not to simply correct it. In reality, the negative destination image Ukraine still takes place in the minds of potential tourists. The increased influx of Ukraine tourists to Estonia can be explained by the wish to find the higher European standards of hospitality at affordable price. For example, in Ukraine the tour operators declare ecologically friendly tourist accommodations, local-grown food free of GMO, clean air and water without any pollution. But such advertisements on the websites might not reflect the actual conditions. And such issues not only do not help the current destination image but also have a potential to further damage negative destination image. While Estonia in its turn promote and provide the locally-grown ecologically-friendly food, rubbish recycling, safe water purification (water in Estonia can be consumed from the normal tap of the central water system), environmental protection (e.g. many natural parks are protected against the industrial engineering or acquisition of land). For instance, the Pühajärve Spa and Holiday Resort even provide for its guests the eco-breakfasts made of fresh high-quality food with eco-labels and organized the eco-shop in their hotel with different kind of products including cosmetics which contains about 99% of natural ingredients and not-tested on animals, herbal teas, unusual chocolate with many healthy elements and natural fresh juices. Otepää Nature Park (Looduspark) in its turn does not except the plans of building on these lands if the plan does not suit the ecological norms which are legal on this area. The executive comitee has to look through every case very carefully, and the decision is made through the special conference.

Concerning the Estonian resorts' development the author analyzed the article of Kask and Raagma (2010). The scientists gave the overview of the formation of Estonian coastal resorts, including Haapsalu, Kuressaare and Pärnu in historical retrospective. The spa tourism sector is well-developed in Western Estonia while it has overcome the transformation during last 180 years, based on an enterprising culture (Raagmaa, 1995) and tradition of being hospitable which Estonians brought through many generations with visitors with different cultural backgrounds. One of the concepts that the scientists present in their studies is that every destination has its unique spirit of place or genius loci describing the success of these destinations. Such kind of spirit of every resort destination in Estonia is becoming familiar for several generations of visitors bringing the positive holiday experiences. Sense of place, its individual environment, as elaborated by Relph (1976; 1996), makes a place and its ambience comfortable for people. This experience



includes the visitors' perceptions about the physical, social and cultural environment of the particular place.

The quality of a place depends on a human context which represents the mixture of visitors' memories and expectations, by stories of real and imagined events, and historical experiences located there (Walter 1981, 141). Even in the 19<sup>th</sup> century the Estonian government was making efforts to develop high-class seaside services and increase its popularity through advertising. The heritage of the pre-war resorts of Western Estonia became a nostalgic ideal landscape with its well maintained parks and green areas, attractive architecture and beach. After the closing of the eastern border the Estonian seaside resorts came through the reorientation to Western markets and to new products. The very fast development and favorable image of the resorts on the western coast attracted more investments in the spa and hotel sectors; in addition the tourism-related and industrial projects were taken into consideration for the future perspective. What was interesting for the foreign tourists are well-maintained urban environment and the brand new hotels and spas of Western Estonia.

While looking for the literature sources concerning the Estonian hospitality traditions, the author of this thesis found interesting the journal article of Vadi and Meri (2005). The scientists were trying to apply the Hofstede model to the Estonian hotel industry. As far as for the thesis' author the question about universality of the regularities of human behavior and to what extent one culture's behavior patterns are applicable to another, the researches of this particular article wanted to find the position of Estonian hospitality in the frameworks of Hofstede's model. There is an obvious proof that organizational operations depend on values of the host culture, hence the level of this impact varies from one country to another. While describing the methodology used in this article, some features of the Hofstede study were pointed out. The scientist (Hofstede, 2003) emphasizes that he looked for the values that are common for all people. The main element which he considered was the relation to power, conflict, and attitudes toward an individual (rooted in the relations between the individual and the society, as well as in gender roles). Next finding was that the national culture impacts greatly to the differences of the employees in the same company while accomplishing the work-related assignments.

Originally, the Russian-speaking countries were not included into the study of Hofstede (1984). However, scientists are trying to apply his results to the replication studies and compare different countries of Eastern Europe with the indices which Hofstede provides.

Such attempt was made by Professor Mockaitis (2005) who compared Baltic countries with Poland. Estonian indices were based on estimates (Hofstede, 2001). It was noticed that even if these countries share similar history and institutional environment, but the true cultural differences make them individually-developed countries with their own unique characteristics.

Such interactions as the interaction between leader and follower, the leading role in organizations, decision making process of the employer and employees, and the level of participation are influenced by the cultural differences of these countries. The most important goal which was set in this study (Mockaitis, 2005) was the prediction of the differences in attitudes about the leadership factors in Lithuania, Estonia, and Poland. There is an idea that even apparently similar cultures can possess many variations concerning the attitudes about leadership, and the explanation can be described by cultural differences.

Despite a relatively similar institutional environment, the national cultural values of Lithuania takes a middle position between Estonia and Poland which concerns almost all dimensions. Culture was called the main cause which gives the different results with respect to the indices for these countries. The strict style of supervision will bring the negative consequences in Estonia because in this country the relationships between the managers and employees are mostly based on interdependence and mutual trust. The cooperation, individual opinion and ideas are also valuable in the Estonian working spheres. In comparison, Lithuanian employees are more willing to be coordinated by the persuasive leader, who can make independent decisions and lead his own style of subordination than in Estonia. That is why there is a possibility to organize more formal relations, and this will not cause the embarrassment inside the collective.

Initiative and participation in the decision-making process is a better alternative concerning the Estonian working processes. According to the Hofstede's vision the low power distance implies that superiors and employees can act interdependently bringing their own attitude to the process and developing the new ideas for the better cooperation and , and subordinates are willing to take the individual initiative associated with decision making and organization's success. Another feature is the high individualism which is closely connected to the low power distance. The low masculinity of Estonia is also characterized by consensus and balance between the attitudes of coworkers. Lithuania in its turn possesses a higher power distance, high masculinity and low level of individualism, so the

participation of the employees in decision-making process will be shown in a different way. This proves the fact that the stereotypes about the similar cultural backgrounds of three Baltic States are comparatively different in values and attitudes is concerning the leadership and subordination. Such studies (Jesse, Kruuda, 2006) can provide new insights for adapting the cultural differences to multinationals in those companies which provide the leisure, tourism and wellness tourism attractions.

In the next research (Vadi, Meri, 2005) it was surprisingly understood that Estonians consider themselves individualistic, whereas several culture researchers claim that Estonians are collectivistic. The main reason could be that under individualism-collectivism categories Estonians understand the extent to which it is preferred to act individually or within a group, thus, some researchers of national culture define these concepts with regard to the extent of emotional and intellectual connection to the group. In individualistic cultures all business partners are treated equally.

Based on the survey results (Vadi, Meri, 2005), Estonian attendants were more independent while acting on their working place, expecting advice rather than orders from their bosses, and were more willing to negotiate. At the same time they didn't need the detailed work-related instructions and regulations. Furthermore, Estonians are not very collectivistic. Such conclusion was based on the findings that almost 40% of the Estonians thought that during the employees' recruitment the decision of the human resource manager should not be influenced by advice or personal acquaintances. The power distance and uncertainty avoidance are lower concerning the Estonian attendants. In such country case, the Estonian cultural type helps to solve the situations according to the rules and regulations (Hofstede, 2003).

## **2.2 An analysis of the Russian-speaking guests' experiences in Estonian Spas**

In every research there is a need to serve a purpose, answer questions, or prove a hypothesis, and all use some combination of special methods to find and analyze what kind of information is important to answer the question. When faced with the issue of choosing an appropriate survey method, the following factors had to be taken into account: the time available for collecting data is quite limited, and there is, more likely, only one interviewer available for collecting information. Due to these two constraints, a self-administered survey approach was chosen as the most appropriate method of data collection.

Furthermore, the author decided that a combination of hand delivery, administration per e-mail can be used in order to reach as many respondents as possible.

The aim of the questionnaire development is to develop a questionnaire suitable for a self-administered survey according to the purpose of the study. Therefore, the questions have to be very clear and unambiguous, and motivational for respondents. Furthermore, the standardized questions and the element of anonymity associated with the questionnaire survey technique enhance the chances of getting honest responses. The aim here is to try to ensure that differences in responses to the survey questions can be interpreted as reflecting differences among respondents, and not the differences in the processes that produced the answers. Concerning the current study it was necessary to collect the facts of being visiting the Estonian spas by the Russian-speaking clients, activities which they like to do there, expectations and aspirations about the quality standards while the conformity of the Russian-speaking clients' demand for the spa services in Estonia with the supply and offer of the Estonian Wellness stakeholders was one of the main objective of the study. The author of this paper thinks that the both open-ended and closed questions can be used in the survey. Additional open-ended questions are included to ask the respondents to explain the feelings experienced during the service encounter (e.g. during the spa procedure or treatment) or the comments about the services which they used and liked or didn't like.

Questions relating to the respondents' profile were placed at the end of the questionnaire since the author feels that private topics should be avoided until the end. These questions are designed to capture the respondents' profiles in terms of nationality, age, gender, education, marital status, and profession. The question relating to nationality is designed as an open-ended question; however, as this particular study aims at the Russian-speaking target market, then the choice of the nationalities shouldn't be very broad. In contrast, a choice of potential answers will be given for all the remaining questions. Respondents are asked to tick the appropriate answer.

Talking about the limitations of the study, there can be some difficulties to explain to the respondents the terms "service encounter" as well as the term "service" itself. Another problem which can appear is the fact that respondents may confuse the topic of interest with "word-of-mouth behavior" and indicated incidents in which other customers could tell them about a good service provider, thus inciting them to go to the particular spa service provider.

Moreover, as it was noticed during analysis some questions could contain value-judgments and be possibly leading questions (e.g. Do you think that the spa service in Estonia is better developed than in your country?). In addition, the closed questions do not allow for creativity or for the respondent to develop ideas and only give them the alternative to choose. Also the problem of the data collection can be caused by the heterogeneity in the group of respondents. While the author of this thesis chose quite similar group of people in accordance to their ethnic backgrounds other matters could affect the results. The most important are different levels of income or different social class and education. Usually, the response rates for such questionnaires are usually higher for homogeneous groups because they are more likely to identify with the goals of the study. Lack of financial resources and the short period of conducting the survey also affected the results of this research, while for more accurate results it could be needed to visit different kind of spas all over Estonia (especially those which are interesting and popular among Russian-speaking clientele) and address the questionnaires to the much bigger number of respondents. These should be avoided as respondents have a tendency to give researchers the answers they think the researchers expect.

Scientific inquiry has to be as objective as possible to reduce biased interpretations of results. The chief characteristic which differentiates the scientific method from other methods of acquiring knowledge is that researches want to let reality speak for itself, supporting a theory when a theory's predicted results are confirmed and challenging a theory when its predictions could prove false. There is a difficulty to identify evidence while different researches seek for their own evidence and experience is frequently incorporated at any stage in the research process. This was the difficulty for the author of this thesis too. First of all while starting the literature review, the author gained many different ideas from the scientists who used various research methods to prove their theory. However, to understand which research method can be good for the particular study on the initial stage is quite difficult. Many iterations may be required to gather sufficient evidence to answer the research question with confidence, however, the time limitations couldn't allow to produce further experiments. While the theory can seem quite adequate and holistic, the questions in the survey can cause misunderstandings by the respondents if to talk to them by scientific expressions. That is why the simplification of the questions and the words used created more difficulties for the author of the particular research while simplicity of results is not always suitable for the theoretical background of the research. Improvements in theoretical scientific understanding are usually the result of a gradual

synthesis of the previous results of different experiments and conclusions of many researchers having their own point of view.

Scientific knowledge is closely tied to empirical findings, and the falsification is always possible during the new experimental observation incompatible with it is found. If to broaden the matter, no theory can be considered completely certain, while the considerations depend on the particular researcher. Other scientists can propose a new theory or the small modifications to the previous theory in order to explain the new evidence. There is always a place for uncertainty of the measurements.

The questionnaire which was conducted by the author was based on the previous study research during the International Educational Course Norbatour organized and financed by the NordPlus Organization. This course was devoted to the topic of “Tourism research and methodology” in the frames of the “Nordic Baltic Studies in Tourism Research” program. One of the tasks for this course was the creation and conduction of the survey for the local people and the tourist in the city of Pärnu, Estonia. It was accomplished by the guidance of Professor Jarkko Saarinen (University of Oulu, Finland) during the second week of April 2012. Based on the respondents’ criticism of the previous author’s survey formatting, the questions have been reformulated to specify the aim of this particular research and to eliminate the terms that aren’t understood correctly. In addition, to prevent confusion, it can be important to include examples of the type of information required.

The survey results were analyzed with Windows 7 software Excel. The results of these questionnaires are shown on the figures by the author of this master thesis. First of all the data base was created where the author united the codebook with all the questions from the questionnaire. The numbers were used to code the suitable descriptive categories in order to simplify the further calculations. The first calculation method which was used is the counting frequencies concerning the answers for every question of the questionnaire. After that it was decided that the percentage rate will be appropriate measure to see the thresholds of the answers of different customer groups. For this reason the Pivot Table in Excel was used adapting the results into percentage.

During the calculations and the data analysis it was decided by the author of this thesis that it could be interesting to group the customers according to their physiological characteristics (including age and gender) and compare the answers of these groups in the questions connected to the preferences of the Wellness and Spa services of every group.

For this particular reason the creation of the Cross Tabulations was necessary. The results for this particular analysis are presented by the author using the tables and diagrams.

Before the preparation of the thesis the author decided to use the qualitative interview research method as an additional method for analyzing the information gathered from the two main sources – the customers and the stakeholders. For the customers the questionnaires were developed and for the stakeholders the author made small interviews which could clarify the strategy of the case study hotel concerning dealing with the Russian-speaking customers.

The method of qualitative interview research is unique because the researcher becomes the instrument for data collection. Qualitative interview research can be supplementary method which contrasts with previously described quantitative survey approach, where a conscious effort is made to find an objective instrument between the researcher and the research participants. Interview research relies on direct, usually immediate, interaction between the researcher and participant which helps the researcher to draw on the best of human qualities or features when conducting an interview: trust, thoughtful investigation, empathy and reflective listening. Interview can be seen as conversations between the interviewer and the interviewee to obtain information concerning the particular research. According to McNamara, interviews are an important tool used to depict the story behind the interviewees' experiences (1999).

The researches usually carry out interviews for two main purposes. They include recruiting staffs to determine the academic background, experience and special skills (leadership or ability to work in teams) and promoting an employee, especially for deciding whether or not the employee deserves to be promoted to a higher position in the organization. Therefore, interview which is a qualitative analysis tool is convenient and useful for many reasons in organizations, and can be a very useful tool for researchers as well.

In this particular research the author had to decide who will be the participants, and why and how they will be chosen. On this stage of the research preparation the author saw her interviewees as the spa hotels' managers (general managers, sales and marketing department managers) who can provide the organization's opinion about its target market and the marketing tools which they use in attracting the new visitors to their spas. It is important to grasp the nature of the interaction between researcher and participant that allowed data to be collected or generated.

There is a need to follow some rules when carrying out the interviews. The interviewer, regardless of interview style, is responsible for ethical, respectful inquiry relevant to the research purpose and questions.

- The interviewee responds honestly to questions or participates in discussion with the researcher to provide ideas or answers that offer insight into his or her perceptions, understandings, or experiences of personal, social, or organizational dimensions of the subject of the study.
- The research purpose and questions serve as the framework and offer focus and boundaries to the interactions between researcher and interviewee.
- The research environment provides a context for the study. Depending on the nature of the study, the environment may be significant to the researcher's understanding of the interviewee.

Researchers and research participants need to know what is expected of them, why, and when. All parties are clear about the purpose of the study, the use of the data and the parameters of the data collection.

Qualitative researchers often use purposeful sampling when selecting people to interview. Constructed or generated sample frames can be used where an existing frame is not available. The author of this thesis suggests the way to construct a frame is by working through organizations while accomplishing her practical training there. Researchers can generate sample frames by approaching people in a particular organization (like the spa hotel), location, setting, or meeting. This method is best used to identify people who are willing to consider taking part in the study, seeking their permission to contact them privately to discuss the study in detail (Ritchie et al., 2003). The insiders can use social capital and social/professional networks to gain entry into the special communities and find people willing to participate in interviews in the particular study. Being a participant in the processes of the company helps to build trust or rapport based on shared experiences or values.

If the interview is carried out by the known and trusted colleague, people are more likely to give it proper consideration than if it had arrived from a stranger. Insider assistants can also help by establishing credibility for the study and thereby encouraging honesty and commitment on the part of interviewees.

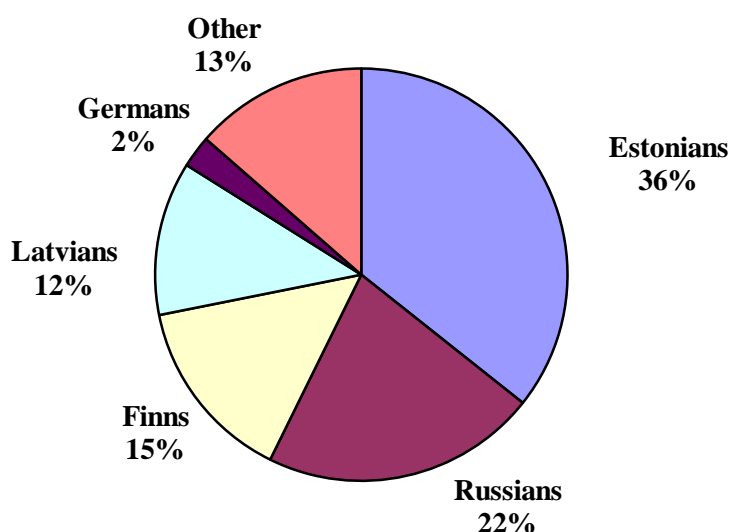


For this particular master thesis qualitative research relies on the interviews and observations of the operational process in the workplace of the author. The gained qualitative results are not anonymous and according to agreements with the respondents illustrative answers and descriptions are used in the analysis of this particular research. However, after the beginning of the research conduction there appeared the problem of the lack of the respondents for the interview. The limitations included the ending stage of the high season while many people of the managerial staff were involved into the busy dealings with the annual reports analysis and the other part of the stakeholders were out of the offices during the dates of the author's training period because of the business trips and conferences with partners.

That is why the author could take only two interviews from the stakeholders of the Pühajärve Spa and Holiday Resort. The semi-structured interviews with two stakeholders from the managerial staff were held, including the marketing manager Liina Lambot-Lepp and the spa manager Triin Saareots of the Pühajärve Spa and Holiday Resort. All in all, it was decided that for the complete research the number of two interviews are not enough that is why the data collected during this stage was used in the review of the internship placement as a secondary source. The information which was gathered during the personal conversations with the people directly connected to the place which was chosen for sample could give the understanding of the personal opinion and the awareness of the stakeholders concerning the cooperation with the Russian-speaking customers.

The whole study research conducted from October 2012 to April 2013 consisted of the theoretical materials analysis concerning the topics of general wellness and spa concept development and cross-cultural studies in particular, analysis of statistics available from the websites of ISPA and Estonian Spa Association (Eesti Spa Liit). The survey with the representatives of providers and stakeholders in wellness and spa health tourism using face-to-face interviews and questionnaire-based customers' survey in Estonian spa Pühajärve Spa and Holiday Resort were carried out. The spa guests' survey was conducted during the period of the 1<sup>st</sup> – 31<sup>st</sup> of March 2013 using the questionnaire in Russian language as the main target group was only Russian-speaking tourists. The author of this thesis collected the survey information by herself while being involved into the daily activities of the particular spa, and in the face-to-face communication with the customers. The personal interaction with clients in a relaxing atmosphere could help to get the less-biased answers and observe the natural reaction to the questions and the researcher. For this particular research the questionnaires forms of 100 respondents were collected.

It is necessary to provide small introductory background of the placement where the author of this thesis was enrolled into the professional activities and collected all the useful information for accomplishing this research. According to the information collected in the Tourism Centre of Otepää, there is obvious two touristic seasons; the high seasons are winter (December, January, and February) and summer (June, July, August). Still the accommodation occupancy in the summer time is higher through the all municipality area. In winter time the main part of visitors stays in Otepää city area because of the big events. According to Otepää geographical location, provided facilities and market trends, the main visitors in Otepää are: Inland tourists, Finns, Latvians, Russians, and Germans (see Figure 1). That means that the tourists from Russia take quite big share in the target market for the region. The biggest number of visitors are Estonians followed by the Russians, Finns and Latvians and about the same number like Finnish visitors are the visitors from other nationalities. Most of the visitors are the adults, followed by the young people, pensioners and the lowest number of the visitors is forming children.



**Figure 1.** The nationality of people visiting the regional hotels and attractions according to the Otepää Tourism Information Centre

While working upon the research for this particular thesis the author found the better placement to conduct her survey. During the period of 1<sup>st</sup> – 31<sup>st</sup> of March 2013 the master student was enrolled into the internship in Pühajärve Spa and Holiday Resort. During the period of this practice the author could observe and participate directly in the daily activities of the hotel and the spa department, had the opportunity to be introduced to several treatments and had the personal communication with the practitioners, as well as

communication with clients of the necessary for the research type and collect all the useful data for the study.

Here are some words to be said about the placement itself and the reasons according to which the author chose this particular destination for her research. Pühajärve Spa & Holiday Resort is located on the shores of Estonia's most beautiful lake, close to the nation's winter capital, Otepää. This area is one of the most popular destinations for the leisure activities in Estonia, there are a lot of internal tourists as well as foreign ones. The resort provides a great variety of options for tourists who enjoy the relaxing spa stays and for the people who like more active holidays alike.

The spa centre consists of two units: the former medical rehabilitation centre nowadays has been developed into a modern and cozy health spa that provides help and relief in case of joint pains, various chronic illnesses, and tense muscles and accumulated stress. For additional relaxation the clients can enjoy various massage baths. All treatments are performed by trained professionals, including therapists specially trained in acupuncture, reiki and oriental massage and physical therapists. There are a lot of possibilities for better pampering with the choice of luxurious body treatments. The spa uses professional cosmetic brands of the following suppliers: the products by Darphin, Gerard's and Babor. For the hand and feet care the Alessandro product line is applied. Complementary beauty services of a beautician and hairdresser are provided to. Lots of attention is paid to the holistic concept of the spa design and philosophy: cozy interior, the pleasant music and attentive service ensure the joy of the complete experience.

The outstanding feature is that In February 2009 Pühajärve Spa & Holiday Resort came first in the organic food category of the Green Key awards held among accommodation establishments. Ecologically pure food is offered by the resort as part of its breakfast buffet and in group menus. As an environmentally friendly business, the resort was awarded the Green Key as early as 2003.

During the preparation of the research the interviews with the managers of the hotel were conducted. To sum up, there are few conclusions which can be noticed according to the local people and executive staff's opinion about the area of this particular resort. First of all, the majority of the International visitors highly valued Otepää magnificent beauty of natural landscape, especially the panorama of Otepää lakes from hotel windows and balconies. Peace and quietness was valued more often. Also possibility to do different

kinds of sport in summer and winter time; the convenient location of the hotel; the price accessibility of hotel service and variety of hotel offers for different activities; inexpensive inventory rent. Some visitors attract the attention of hotel architectural concept. Some people prefer to be at one with nature and choose remote places in campings in a forest area.

Next table is representing the adapted annual hotel's statistic made by the Marketing and Sales department of the Pühajärve Spa & Holiday Resort. Here the Estonian (domestic) target market share is compared with the Russian-speaking countries' visitors (international market) share for the years 2011-2012. It is clear that Russian people are prevailing in this rate. This proves the importance and better access of the people from Russian cities than from Ukraine and Belorussia. Such results were also confirmed by the interview answers of the managers who told that people from such cities as Moscow, St Petersburg and Pskov are the primary target market for them during the International Tourism Workshops and Fairs.

**Table 1.** The dynamics of the Russian-speaking customers' visitation to the Pühajärve Spa and Holiday resort for the years 2011-2012

| Rooms |             | 01.01.2011-31.12.2011 |        |          |        |        |        |        |        |
|-------|-------------|-----------------------|--------|----------|--------|--------|--------|--------|--------|
|       |             | Adults                |        | Children |        | Total  |        | Rooms  |        |
|       |             | Visits                | Nights | Visits   | Nights | Visits | Nights | Visits | Nights |
| EE    | Estonia     | 12304                 | 18951  | 1652     | 2896   | 13956  | 21847  | 6648   | 10289  |
| RU    | Russia      | 592                   | 1969   | 77       | 220    | 669    | 2189   | 321    | 1085   |
| BY    | Belorus-sia | 1                     | 4      | 0        | 0      | 1      | 4      | 0      | 0      |
|       |             |                       |        |          |        |        |        |        |        |
| Rooms |             | 01.01.2012-31.12.2012 |        |          |        |        |        |        |        |
|       |             | Adults                |        | Children |        | Total  |        | Rooms  |        |
|       |             | Visits                | Nights | Visits   | Nights | Visits | Nights | Visits | Nights |
| EE    | Estonia     | 14338                 | 20501  | 2073     | 3560   | 16461  | 24061  | 7676   | 11044  |
| RU    | Russia      | 916                   | 2901   | 152      | 559    | 1068   | 3460   | 468    | 1480   |
| BY    | Belorus-sia | 37                    | 121    | 0        | 0      | 37     | 121    | 22     | 76     |
|       | Ukraine     | 11                    | 11     | 0        | 0      | 11     | 11     | 5      | 5      |

**Source:** Annual statistical report of the Pühajärve Spa and Holiday resort made by the Marketing and Sales department 2011-2012

On the contrary, Ukraine and Belorussia are not covered by the special promotional programs of this particular hotel. While in 2011 the visitors from Ukraine even were not included in the list which could be understood that even if there were some representatives from this country, but they were really so few that could be included in the graph “Others”.

Then in 2012 the positive dynamics is clear, the number of Ukrainian tourists has increased slightly and were awarded the place on the general table of visitors of this hotel. The overnights for adults of guests from Russia (especially such cities as Moscow, St Petersburg, and Pskov) have grown almost for 1000 per year which says about the positive results of the marketing strategies, good feedback and high level of satisfaction of the previous visitors. The visits from Belorussian guests showed remarkable results while their number of nights spent in the hotel increased almost in 30 times. On the general picture they are still remaining as the one of the lowest number of foreign visitors for this spa, but in particular this situation says about the better awareness of this quite remote country about the Estonian spas and the Pühajärve Spa & Holiday Resort especially.

## **3. RESULTS AND DISCUSSION**

### **3.1. The analysis conclusions**

The following results represent the analysis of data which was collected during the preparation of the particular research and master thesis. The information was gathered using the questionnaire results among 100 customers of the Pühajärve Spa and Holiday Resort. In recent years the increasing number of Russian-speaking visitors has been noticed in the area of the hotel. The number of Estonians and Finns has decreased; the number of Russians has increased slightly. Mainly Russian-speaking middle-aged people are coming for holidays to this place. There were 73 female and 27 male respondents, mostly of the age from 24 till 47 years old. Such kind of the age groups was also confirmed by Liina Lambot-Lepp who told that the bigger number of the customers are usually middle-aged people of 30 to 50 years old. They are mostly coming with families, because as the manager supposes it is not very common that Russian-speaking people are coming alone. The coding method was used during the analysis which simplified the calculation process and the adaptation of the answers' results.

Talking about the theoretical background discussed in the previous chapters, there have been recognized some changes in profile of a client also have different results concerning the spa development. Obviously, for the last decades of the 20th century the majority of clients were women of the middle age. While the research of Langviniene Neringa and Sekliuckiene Jurgita (2009) showed that the number of younger (less than 30 years old) customer groups of wellness services increased greatly. This tendency has been proved by the particular research, while the number of the clients of the 24-30 years old was about 26 percent of all the respondents. Only one person from this number was a man, other 25 people were women. However, in general, the percent of men visiting spa has risen significantly during the recent years. That means the author of this thesis has proved the

above named theory concerning the gender changes as well with the bigger number of male clients in the Wellness centers.

The survey included the topics concerning the reasons and motivations in choosing the particular spa destination, the expectations of the customers, and their preferences in the treatments' choice, educational level, gender, age, and recommendations concerning the development of the spa services in Estonia. Questionnaires were in Russian language as it is the main target group of visitors for this particular research. However, the author also translated the survey into English language in order to present it as attachment and an illustration of the original questionnaire. The analysis of results followed the deductive route.

The author of this paper was using the illustrative examples of some tables and graphs to present the results for better understanding and visually. There are few open questions in the questionnaires that is why the author is using the citations from the survey answers which are wrote in italics. Most of the respondents were tourists from Russia, especially from such cities as Moscow, St Petersburg and Pskov of the middle age. So, as a conclusion it can be noticed that among the Russian-speaking category of clientele in the Pühajärve Spa and Holiday Resort the people from Russia prevail.

The first part of enquiry was about the general expectations of the customers and their experience. The purpose of this part was to gain the first data about the people's considerations of Estonian spas in general. On the first question about the previous experience of visiting Estonia only 37% of tourists answered positively, and 63% of the customers decided to visit this country first time in their life. However, in general it can be noticed that the percentage of customers who are constantly coming to Estonia for several years can show the progress of the connections with loyal group of Russian tourists. Concerning those people who already visited Estonia during their holidays, in the second question the frequency of times of their previous experiences varied between 1 and 30 times. People who answered that they were about 30 times in Estonia in reality owns the accommodation in this country, that is why the 90 days annual visa can permit them to come there quite often. Actually, this gives an interesting thought that Estonia is attractive for the Russian citizens also as a potential country to buy the accommodation there, and the one positive answer from 100 respondents is quite high rate if to look more carefully. It is not clear if it can be considered as a real percentage, because there were some limitations.

First of all, the bigger number of respondents is needed if to make a research about the accommodation deals of Russians in Estonia, then the respondents group was too specific considering mostly the sophisticated travelers who are interested in healthy life styles, and finally, as there was no such question about the interest in buying accommodation in Estonia in the particular survey, then the author is not sure if other 99 respondents don't have an apartment in this country. But all in all, this was an interesting case. Such wide movement of interest to buy the accommodation in Estonia by Russian citizens started after Estonia joined the European Union. The transparent borders to the Shengen Zone, similar social system, reduced barriers in a matter of the expenditures and limit in investments to Estonia, and good accessibility to Estonia gave Russian people a chance to buy the accommodation in this country and get the 90 days annual visa which allows them to visit European countries without any problems with the consulates.

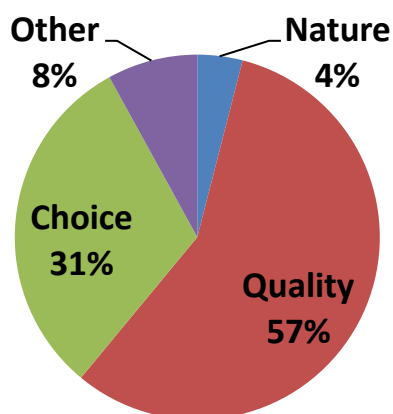
The third question in the survey was about the expectations of the customers and they had to choose between positive or negative answer if they got everything that they expected or not. And the dynamics which the author got was quite good. Some problems with the perceived quality appeared only in 11% of cases, other 89 % gave the strong positive response. The problematic issues were offered to fill in for the question number four. This can mean that there is not a big gap between the perceived and received quality in Estonian spas according to the Russian-speaking customers. The high rate of satisfaction by the services can mean that most of the Russian tourists who come to Estonia to visit the local spas don't expect something unusual and luxurious; however, the services which they get there exceed their expectations. Such dynamics can be seen also through the online customer feedbacks concerning the Estonian spas. Most of people who were answering the particular survey told that they were hesitating in their wish to visit Estonia.

First of all, in Russia, Ukraine and Belorussia the stereotypes about Estonia are still strong. And society of these countries cannot understand that Estonia has become the member of the EU quite successful in its development. This why tourists are thinking about spending their holidays in Estonia, they mostly hear such warnings that only sanatorium-types rehabilitation hotels can be found in Estonia. This creates the pre-considered opinion about the medically-based holiday hotels which cannot have some new and popular treatments or services. Followed by these perceptions people get the feeling of a little cultural shock when reach their final destination. The services of high quality of the European standards amaze the customers.



The reasons for visitation and attractions were included in the fifth question. In accordance with the internal studies of the Pühajärve Spa & Holiday Resort on the Russian market insights the purpose of visit in more than half of the cases is holiday. Additionally leisure travel, including visiting friends and relatives, and business trips are also essential. An increasing share of travelers from Russia stays in their own purchased property abroad or with friends or relatives. Apart from relaxation and leisure activities the favorite occupation of Russian tourists is shopping. More educated visitors with a higher spending budget are also interested in history, culture and foreign traditions and increasingly like to participate in sporting activities as a part of active tourism.

The answers for this question formulated some contradictions with the first author's theory of the previous question. 57% of the respondents confirmed that the main reason for their visits is the high quality of spa and hospitality services in Estonian spa and holiday resorts (see Figure 2). This means that more than a half of the respondents already knew that the services should be well-developed. Then, the theory about the lower expectations cannot be completely true. It seems that the other 43% could be not sure in the quality of services before the trip. However, the high percent of sophisticated clientele who already were prepared to get some new and interesting experiences says about the better awareness of the Russian-speaking clients about the spa procedures and the quality standards. Moreover, this means that those people travel often and in different countries they could try and then compare the spa services. It must be taken into consideration, that the respondents were mostly from the biggest cities of Russia, Ukraine and Belorussia, such as Moscow, St Petersburg, Kiev and Minsk. These mega polis cities are also developing very fast and during the last decade they are gathering information from the Western countries about the hospitality and tourism novelties. The lowest percent of the respondents pointed out that the nature of Estonia itself was interesting for them to see. The second popular category was the choice of services. This was described in the terms of the great choice of the treatments and services in spa complex.



**Figure 2.** The main reasons of the Russian-speaking clients for visiting Estonian spas.

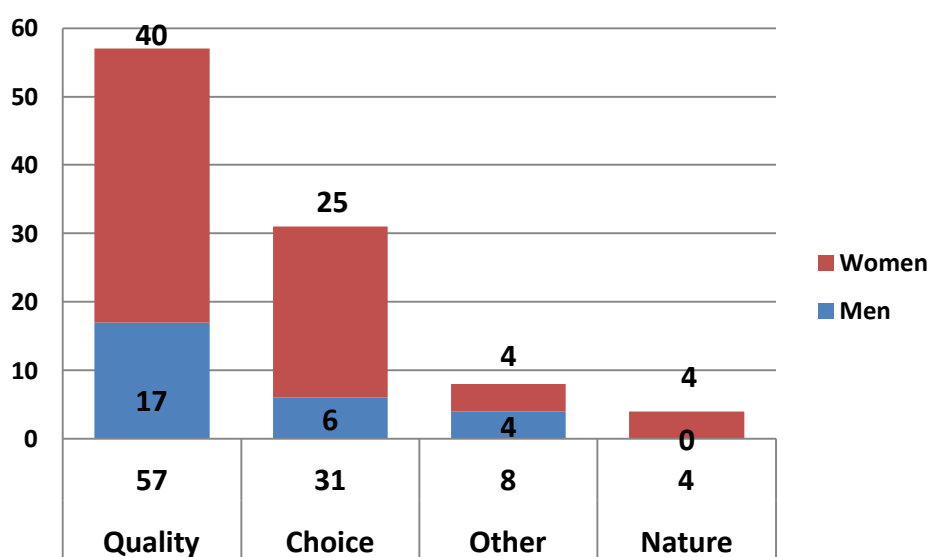
According to the comparative figure of the answers of men and women (see Figure 3), it is seen that mostly women are concerned about the motivational issues. However, in the general, 17 men from 27 respondents of this gender answered that the main motivation for them was quality. This means that almost 50 % of the male respondents are aware about the quality standards and quite sophisticated in the sphere of spa. Actually, nowadays there are can be noticed the changes in the Russian-speaking men's views about the spa treatments for men. Needless to say, that the stereotypes about the male customers of the spa and beauty salons are still strong in the Russian mentality. If the man goes to the hairdresser and to the fitness center and gym – it is seen as the sign of masculinity and the wish to look neat. However, if man wants to use some kind of facial treatments, wraps or scrubs, these can be interpreted as a feminine occupations and gay manifestation. It is a generally accepted fact that the better loyalty for the homosexual orientation is formulated in the society and country, the more frequently men use the spa treatments. In Russian-speaking countries such considerations are seen as the conservative views based on the religious, social and political circumstances. On the other hand specialists tell that this can be defined only by the misunderstanding, narrow mindedness and unwillingness to try something new. But the positive dynamics in a better attitude to the special treatments for men is already seen. People who are aware about the travelling possibilities, development of the health tourism and spa trends, are eager to try the new procedures and think that not only women can use such kind of relaxing, stress relieving and health restoring services.

Based on such considerations, many of the international spas started to focus men in particular. It is declared by the spa professionals that men usually pay more attention to the stress relieving and relaxation rather than their look. That is why they create the special

relaxation programs and packages especially chosen for the male customers. Then the choice of the cosmetic and aroma oils has been widened and is advised to the client before the procedure. Moreover, some of the spas offer the separate rooms for the male visitors; the main difference is usually in the color spectrum of the furniture and design. The intensiveness of such treatments as massage, wraps or other body treatments also plays an important role for men. Because women are more sensitive and cannot accept the rough massage, while the same procedure can seem too weak for men who are usually have a bigger body mass and the muscles which are not so sensitive to the tension.

Concerning the particular case of the Pühajärve Spa & Holiday Resort the hotel also developed the special men package. And according to the international trends it is focused on the stress relieving. It includes the swimming pool visitation in the morning hours, classical massage or the Chinese massage, Alessandro treatment for hands and the salt chamber stay. All the procedures are highly recommended for the balance restoration.

In the list of other reasons there were mentioned the possibilities for the active leisure activities (especially for the case of Otepää area), cultural tours and business trips and organization of the conferences. In this category male and female respondents' score was equal.



**Figure 3.** The comparative figures for the main reasons of the Russian-speaking clients for visiting Estonian spas.

In the sixth question the group type and travelling preferences were noticed. The answers were grouped into two possible variants. The first answer was for those who prefer to travel by their own. The second answer included travelers who spend their holidays as couples, with the full family composition, one parent with children, or with siblings. Only 15 % of the respondents preferred to travel and discover Estonian spas alone. And the majority of 85 % usually visit wellness and Spa centers in Estonia with their relatives or friends. This means that the different spas in Estonia can offer the variety of services which are suitable for many groups of visitors including the tourists with children.

The seventh question was about the organization of a trip. If it was organized by the travel specialist or it was not needed. The majority of the respondents told that they booked and organized the trip by themselves. 70 % of tourists trusted the travel companies to organize the tour package for them. While the percentage of the tourists' own bookings has grown significantly in the recent time still to 30 %. Such high percent of the independent bookings shows relative simplicity in reaching Estonia. This can be accompanied by the faster Estonian visa applying process, simplicity in finding the transport possibilities and the quite low prices for the tickets and services.

Booking habits of Russian-speaking customers are determined by their lack of foreign language knowledge and the desire for all-inclusive services. Later in during the preparation and consumption phase they are accompanied by Russian speaking tour guides who assist them and help them with occurring problems. Tour guides wait for new arrivals at the airport and keep in contact during the entire stay at the destination. Consequently even without any foreign language knowledge they can always rely on the local tour guide which gives them great security.

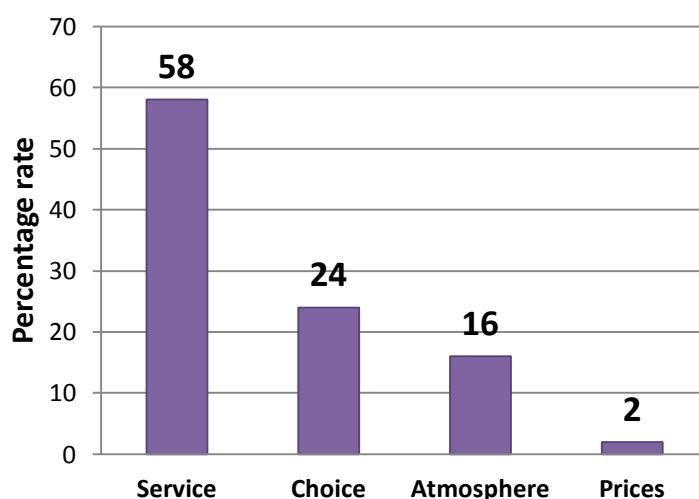
What is most important for them is that a package tour contains all the elements they need to travel to and stay at the destination. It involves the air tickets, the airport coach transfer, the lodging, the meals and the medical treatments. They simply need to select the prepared package they desire and the native tour operators handle the implementation. This is a very convenient way of booking for Russian, Belorussian and Ukrainian leisure travelers, who prefer to choose an all-inclusive package where they do not have to organize tourism product elements and can focus on relaxation.

The eighth question was about the satisfaction with the service in the particular hotel, here the Pühajärve Spa and Holiday Resort. The majority of the client of 97 % answered

positively. Only 3 % of respondents encountered a couple of problems. They were described in the ninth question. Mostly they were connected with the overcrowdings in the swimming pool during the end of the week and also sometimes the impossibility to get the procedure upon arrival to the spa center while it should be booked in advance.

In the next question the customers had to answer if they consider the standards and quality of the spa services higher in Estonia than in their own countries. Surprisingly, 100 % of the respondents gave the positive response. That means that the Russian-speaking customers are aware about the quality of the same spa services in their home countries and still value the Estonian spas more.

The motivations were included in the eleventh question. The customers could choose from the general atmosphere and design, good service, choice of the treatments, good accessibility, other.



**Figure 4.** The motivations of the Russian-speaking clientele

As a proof of the previous question results the willingness to get the better service is the most important motivation for customers from the Russian-speaking countries. 58% of the respondents are concerned about the quality standards of the Estonian spas. Moreover, 24 % of the clients also think that the choice of the treatments and services in Estonian spa hotels is also necessary. Wellness and Spa hotels in Estonia are striving for the maintaining the high quality standards in their premises because of the several reasons.

The government receives revenue from tourism tax; the hotels receive an increasing number of guests from Russian tour operators. Not only is their number significant on the

tourism market of the Otepää area and projected to grow further but several characteristics make Russian, Belorussian, and Ukrainian customers appealing for the local suppliers. First of all shopping and purchasing souvenirs are part of their main activities during their stay in the city. They are one of the few nationalities who are not concerned about sales prices and have the sufficient capital to actually buy the product or service they desire on the destination. This unique combination of demand and strong purchasing power holds great business potential for Estonia. This is another improvement on past tendencies when Russian speaking customers preferred one week stays.



**Figure 5.** Main Consumer Trends for Russian-speaking Visitors in Estonia

Generally speaking about further adaptation of the local tourism sphere to meet the needs and expectations of the Russian-speaking market the key aspect is communication. This involves both face to face interactions, promotion through printed material and online information sources. Previous experience reveals that Russian speaking guests do not know foreign languages well enough to communicate abroad. A tourist profile provides up-to-date information for the management of a business operation about the needs, wants, dislikes and consumer trends of a certain visitor group. In this case the group involves all the outbound tourists from the Russian Federation, Belorussia and Ukraine in Estonia.

Figure 4 shows six trends which describe the main social and financial characteristics of tourists from Russian-speaking countries. They provide information regarding their purchasing power, language knowledge, relationship with other European nationalities, choice of tourism services, booking habits and interest in local real estate.

As it was noticed in the theoretic chapter that according to the newest trends (Yeoman, Introduction, 2012) the growing interest of tourists for bargains became an important characteristic of the tourism offers. However, based on the findings of this particular research, it can be pointed out that this trend does not concern the Russian-speaking customers of the Estonian resorts so much, as only 2 percent of the respondents answered that the price was the most important motivational factor for them to choose the travel destination. That means that those tourists who are coming from the post-Soviet countries are not bothered by the mercurial consumption concept.

Sales prices do not concern visitors from the three case study countries as it was written before. Generally, they not only can find the products and services which are not available in their home countries but the quality-price ratio is really favorable for them in Estonia. Basically Estonia offers them unique medical and wellness possibilities at an affordable price. That means that the theory which is described by Ian Yeoman (Introduction, 2012) about the new type of tourist is not applied to the Russian-speaking people coming to Estonia. While there is mentioned the concept of mercurial consumption the Russian people don't pay a lot of attention to it as the European people do. Of course, those ones living in the big cities and who are aware of the last minute offers can be interested in looking for something cheaper and more suitable for them. But usually, if there is a question about the quality, then they prefer to pay more but to be sure that they will get the better services.

This is seen as a Russian logic created by the Soviet times. The higher the price the better quality of the services they think. And as it was noticed in the research results, the tourists from the Russian-speaking countries are mostly coming to the spas in order to get the luxury Wellness treatments which they are not able to get in their own country. That is why they understand the costliness as a reasonable price for their comfort and satisfaction. On the contrary, people who are up-to-date with the newest trends in tourism sphere understand that the low price does not necessarily mean the low quality. Obviously, so called hot deals happen during the week or some days before the expecting arrival dates and the hotels don't have the full house yet. Because of these circumstances they have to

decrease the prices and make very beneficial deal offers in order to attract at least some people to the hotel and not to get loss of revenues. Understanding this gives the sophisticated Russian-speaking customers the possibility to spend their holiday in places where they couldn't go before because of the high prices. Among those visitors who participated in the survey for this particular research only two people answered that they were motivated by the price rates primarily. Others even if were thinking about the price levels didn't make it the main element for choosing the holidays in Estonia.

On the contrary, it is a very interesting matter that only women are thinking about the better deal and cheaper services. This can be explained by the fact that those female respondents who ticked the price as a main motivation are the single travelers. And they due to the low finance situation or the lack of the sponsor (e.g. husband) cannot afford some of the more expensive services.

Of course in the case of Estonia the health tourism is one of the top performing sectors nowadays. The hotels which located in the resort areas and have a standard of 4-5 stars can have reasonably higher prices. This feature of health tourism combined with the extended stays and the strong demand on both the domestic and international markets makes it a profitable business. The Russian-speaking tourists coming from the bigger cities have strong purchasing power supported by their high and competitive salaries. On the contrary, people from more remote regions living in the small towns cannot afford such types of holidays even if they are aware about these possibilities and wish to try them at least once.

In the next table there can be seen the differences in the motivational factors meaning for the female and male clients. Thus, the prices and the choice of the treatments and services are only factors which are the inherent traits of women who are coming to Estonian spas. While men are more concerned about the quality of the services and getting the holistic experience during their holidays. Hence, in these categories they are almost of the same opinion with their wives. It is interesting, that nobody considered distance and accessibility as a main motivational factor for them. Because usually in Russian-speaking countries the stereotypes about the small distance to Estonia which motivates the tourists to come still prevail. That means that the author of this thesis could unveil this kind of social myth. The Russian interest to Estonian spas does not have anything common with the political situation between those countries.

**Table 2.** The comparative table of the motivations for male and female respondents



| Customers     | Motivations |         |        |        |       |
|---------------|-------------|---------|--------|--------|-------|
|               | Atmosphere  | Service | Choice | Prices | Total |
| <b>Female</b> | 9           | 38      | 24     | 2      | 73    |
| <b>Male</b>   | 7           | 20      | 0      | 0      | 27    |
| <b>Total</b>  | 16          | 58      | 7      | 2      | 100   |

**Source:** Author's made based on the questionnaire's data collected

Nowadays it is not only the high society who can afford an extended medical treatment but the upper middle class as well. However, such specialties like dentists, teachers and engineers who are seen to be high-paid in other foreign countries are actually underpaid in Russia especially. Usually these categories of professionals are included into the State budgeters' list and don't get very high salaries in the majority of Russian cities. The exceptions only include the Northern part of Russia and the cities of Moscow and St Petersburg, where the severe living conditions or compatible competitiveness of different companies can cause much higher salary rates than they are in small cities. People who can find the well-paid jobs include business men, trade sellers and dealers, tour operators and the employees of the tourism and hospitality sectors. These categories of workers have enough income to purchase package tours to Europe, and Estonia in particular.

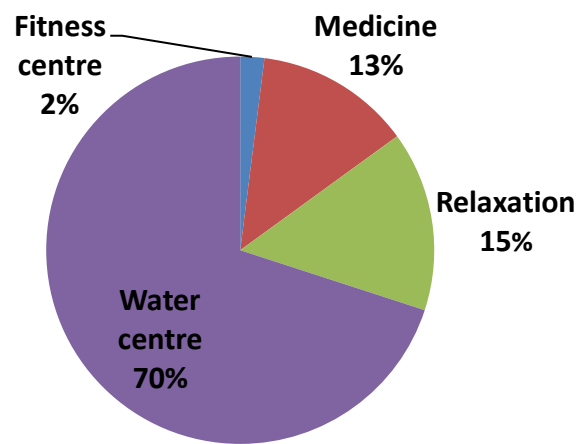
The price level of all the elements of the Estonian local tourism product, including hotel rates, medical treatments, entrance fees and material goods compared to a Russian income are reasonable while still representing high quality. Spas, water based treatments and health therapies have a long tradition in Estonia however the same is not true for Russia or Ukraine. Such wellness facilities which are offered on the Estonian market are simply not present on the Russian market. This can be proved for example high interest of Russian-speaking tourists in the salt chamber. Such kind of treatment is not developed in these countries; the only similar thing which Russian-speaking spas and sanatoriums can boast is salt inhalation treatment. In these countries a healthy salary is truly competitive on an international level however they face the problem that domestic suppliers in health tourism are either not able to satisfy their high needs and expectations or offer too expensive prices. The difference could reach up to twice or three times the prices offered in Estonia.

As for Otepää the reasonable prices, the traditional spa culture together with the pristine nature create a unique selling point for the destination in the eyes of the potential Russian, Belorussian and Ukrainian customers. At this point it is important to mention that this nationality group is highly brand and quality oriented. Mostly, based on the survey results

they prefer the upscale hotels with at least 4 star rating and an all-inclusive service providing meals, treatments and programs during their stay. However, in case of Pühajärve Spa and Holiday Resort, which has 3-star standardization, the quality of treatments and services are highly valued and also attractive for customers of this particular group without orientation on the star rating.

Concerning the most popular services the customers could choose from the list of fitness center, medical treatments, relaxation procedures, water centre and other. Surprisingly, 70% of the respondents answered that their favorite leisure attraction is the water center. Such result seemed for the author to be interesting because the water center is not usually seen as something unusual or unique. There are many water centers in Russia, Ukraine and Belorussia, and they are quite popular among the local customers. Then there appeared a question why still it is chosen as a best service which Russian-speaking customers would like to use frequently in Estonian spas. In order to understand such kind of regularities the author of this paper looked through the secondary materials concerning the circumstances which make the Russian customers pay much attention to the water-based leisure. Then the reason was found in the priority which is given to the water centers in Russia, Ukraine and Belorussia.

This kind of premises in the Russian-speaking countries is considered to be the occupations for rich people who can afford luxury. This fact is based on the price levels for the monthly tickets to the water centers in these countries. The lowest prices in Moscow vary from 150 to 250 euro/per month. Such kind of services is not accessible for the middle class people who get the salary about 300-350 euro/per month. While the Western European countries and Estonia in particular, made these kinds of service offers quite normal for the middle class clients who would like to visit these centers at least twice a week on weekends. These differences in attitude to the luxury and necessary services in spa made the Russian-speaking clients satisfied with the profitable conditions of the water center visitation. In the case hotel of Pühajärve Spa and Holiday Resort the visits to the water center are included for all the customers of the hotel. However, the time of visits depends on the type of package. For the simplest packages the swimming pool hours start from 7 a.m. till 12 a.m. For few packages the swimming pool is available during the whole day. And the percent of the swimming pool cost is not very high in comparison with the total cost of every single visit what makes the spa hotel more attractive for the Russian-speaking tourists.



**Figure 6.** The most popular Wellness services for Russian-speaking clientele in Estonian spas

The purpose of relieving the stress is also true in the case of Russian speaking guests however; they do not always keep the norms of behavior in the public places of a spa. Occasionally they wear swimming suits in the sauna or they do not change into appropriate clothing for meals.

Aside from health care Russian, Belorussian and Ukrainian visitors participate in the active tourism the region has to offer. Bicycle touring and Nordic walking are the two most popular recreational activities. Talking about the Pühajärve Spa and Holiday Resort, the centre has a wide selection of rentable bicycles in excellent condition for a reasonable price during the summer time. The summer leisure possibilities also include the renting of the tennis, badminton, and basketball equipment. Nordic walking is also an outdoor sport which can be practiced regardless of age or physical condition. These activities are excellent to promote the human health besides the swimming pool bathing and the medical treatments.

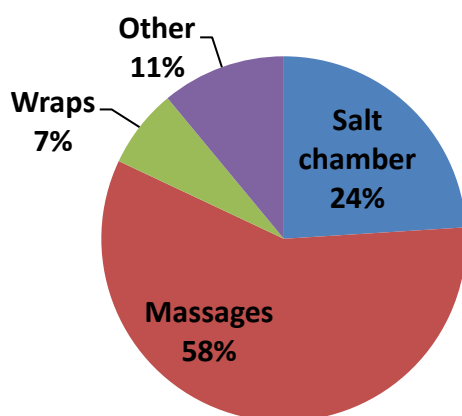
For Russian-speaking customers the traditional native wellness treatments are also important. And while they are eager to try something new, they also want to find some kind of services which are familiar to them. The most important service for them still remains saunas or how they are called in Russian - Banya. This kind of tendency is manifested because of the severe climate conditions in which Russians live, they always had to adapt their bodies to survive in coldest winters and unpredictable summers.

The methods used by generations of Russian people are:

- The Russian steam bath (BANYA)
- Phytotherapy and honey treatments
- Special massage

In brief the Russian Banya is a combination of mild humidity (70%) generated by a fragrant steam, and a comfortable temperature (up to 70C°). This proportion is the most favorable for a human body, providing optimal conditions for deep detoxification. Local herbs, honey and berries are also chosen to accompany “banya” treatments.

The treatments which customers tried in the Estonian spas could be chosen from the options in the question number 13. The answers which were offered by the author included salt chamber, new types of massages, new types of wraps, and other, where the client could write another treatment which didn’t present in these categories. The most popular treatment still remains the massage with 58% of approval by the customers.



**Figure 7.** The new kinds of treatments which the Russian-speaking customers wanted to try

Furthermore, this is proved both by women and men where the share of female respondents is 40 people, and the male customers in its turn is 18 people from 27 ones in total. The second place the salt chamber takes which was named by the 17 women and 7 men. Wraps are called only by the 7 women who wanted to try some holistic treatments imagined as luxury ones. Such kind of small percent people who want to try the luxury body treatments can be explained by the relatively high price of these procedures because of the prolonged time of performance and the high costs of the cosmetic products used. The fact that men did not use such kind of treatments is explained by the stereotypes that

these services are too feminine and seen as an offense of their masculinity. 9 women and 2 men answered that they wanted to try something new and unusual that is why they related Aurveda, Cryo Sauna, Hammam to the category Other (see Table 3). Not so many Russian-speaking customers are brave enough to try something different from the traditional wellness treatments.

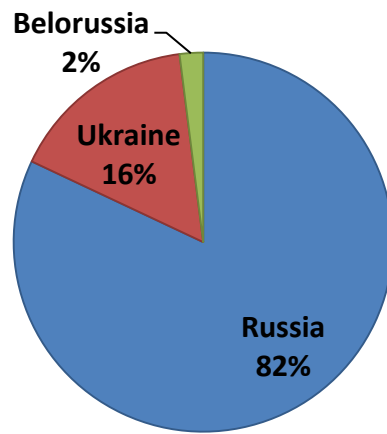
**Table 3.** The cross tabulation of the treatments' use categorized by gender

| <b>Customers</b> | <b>Treatments</b>   |                 |              |              |              |
|------------------|---------------------|-----------------|--------------|--------------|--------------|
| <b>Gender</b>    | <b>Salt chamber</b> | <b>Massages</b> | <b>Wraps</b> | <b>Other</b> | <b>Total</b> |
| <b>Female</b>    | 17                  | 40              | 7            | 9            | 73           |
| <b>Male</b>      | 7                   | 18              | 0            | 2            | 27           |
| <b>Total</b>     | 24                  | 58              | 7            | 11           | 100          |

**Source:** Author's made based on the questionnaire's data collected

Based on the interview results with the managers of the hotel such kind of the services' choice was considered to be the most interesting one for the Russian-speaking countries. They are swimming a lot, and they like to visit the water centre as often as possible. In winter the customers like good skiing trails and the fact that the Pühajärve Spa and Holiday Resort are renting the ski equipment is important too. During the summer period riding bicycles and tennis are the main occupations of Russian-speaking customers.

The next group of questions was devoted to the customers' profiles. Concerning the country mix, it was noticed that the visitors from Russian Federation is the biggest share of the tourists coming to the Pühajärve Spa and Holiday Resort. The geographical proximity certainly played an important role in the case of the Estonian spa supply meeting the Russian demand. Estonia is definitely not a long haul destination for Russian and Ukrainian passengers and the distance between the two countries is covered by the aviation industry which is a time effective, affordable and comfortable mode of transportation. A Moscow-Tallinn flight takes approximately 1.5 hours which is a very short trip.



**Figure 8.** The country mix general shares

Public safety in the resort city must be also excellent where streets, parks and homes are protected and both residents and tourists can take a quiet stroll during the night without any concerns. Russian speaking guests are arriving in great numbers all around the year and it is very common to come across signs, advertisements, menu cards and brochures in Estonia. This provides a sense of Russian-Estonian bond especially since tourism suppliers are training their staff to speak Russian.

### 3.2 Recommendations

While in 2011 the development of the Russian-speaking clientele in Estonia showed remarkable progress, the 2012 tourism from Russia demonstrated the biggest increase in absolute figures. According to the Q4/2012 report *European Tourism In 2012: Trends & Prospects* by the European Travel Commission, Russia remained the fastest growing target market within Europe, and Estonia in particular. As in previous years, tourism from Russia continued to increase gradually in their most popular destination Tallinn (+23%), however, the other regions of Estonia are also interesting for the tourists from Russian-speaking countries. It is also noticed by the slight decrease of the interest to Tallinn because of the active promotion by various regions and entrepreneurs who would like to develop new spheres of tourism and innovational attractions with many kinds of leisure facilities.

In July 2012 the Russian Touristic Company Travel.ru made a research concerning the expectations of Russians from Moscow St Petersburg regions about the spa tourism to Estonia. Based on results, 47 % of Russian people visiting Europe regularly use their vacation time for enhancing their health, while in Europe this number is not bigger than 25

%. Only one third of Russian tourists visit spas by their doctors' prescriptions. The majority of Russian people would like to get the luxury relaxation treatments and have the rest from daily routine. However, from the number of people participated in this survey, only 7% visited spas in Estonia, but 50% of respondents wanted to visit them. Most of people in Russia believe in the word of mouth and the recommendations of the friends and relatives while thinking about going abroad for the spa tourism. Russian tourists are having rest in Estonian spas on average 7 days per one visit, while Europeans prefer to spend long weekends there.

The primary treatments which Russian guests take are mostly wellness and preventative ones. The less interest is paid to the programs which promote the quality of life while only 39% of Russian tourists use them. In 2013 the research about the mud therapies will start, and in the spa hotels the new programs will be offered. The motto for this program will be „If having holidays – then in Estonia!“. The year of restoration tourism and active life style will be followed by the program 2014-2020 when the global concept of perennial tourism in Estonia will be developed.

Based on the previous results of this particular study, it can be recommended for the Estonian spa providers that the Russian-speaking guests expect guest essentials to be prepared in the rooms like bath robes and slippers and services such as in-room safety deposit boxes and wireless internet connection on the entire premise. Such luxury services as sauna world, steam room, salt chamber, thermal bath, swimming pool and a hydro pool with music and light effects are really popular among the Russian speaking guests and are basic parts of their expectations. Talking about the case study resort - Pühajärve Spa and Holiday Resort these Russian-speaking tourists demands were taken into consideration and now they are preparing for the expanding of the water centre and building new wing of the spa premises.

They also seek warm hospitality and Russian language knowledge among the staff members especially in the front office area where receptionists and concierges are in direct contact with the guests. This also matters for shopping in the city where they tend to visit boutique stores offering local cultural souvenirs.

In terms of language knowledge the mutual experience of local businesses is that Russian-speaking guests rarely know other languages. This is a problematic issue and can lead to misunderstandings and frustration on both sides. Clearly the host community has to adapt

to this situation and develop their Russian knowledge and find ways to communicate more efficiently. In real-world practice this means that staff members participate in Russian language courses. Of course some employees already have a basic vocabulary with essential words and expressions however this is not enough for the future. Predictions show that the number of Russian-speaking tourists will continue to rise and local suppliers need to prepare to meet their expectations.

Mrs Liina Lambot-Lepp claimed that an important aim of Pühajärve Spa and Holiday Resort is to expand further toward the Russian market and receive more guests from this region while still maintaining other nationalities as well. Russian is a complex language with a different alphabetic writing system - the Cyrillic script; therefore the language development of the labor force may take several weeks. For now Russian tour guides or translators help the work of the front office staff to do group check-ins fluently and Russian translators help the doctors to communicate with the guests. The results reflect that generally customers from Russia, Belorussia, and Ukraine are satisfied with the in-house services although they had some concerns. The most criticisms are related to the lack of Russian speaking staff members and promotional material in Cyrillic script.

In terms of accommodation they always prefer the upscale hotels offering all-inclusive service. It is highly important for them to receive all the pre-paid services within the hotel with meals, spa facility, treatments and animation programs like yoga or aqua fitness. They expect high quality in every service offered by the hotel.

They also need the help of the tour guide or a translator during check-in and guest orientation, basic Russian language knowledge from the front office desk agents and Russian television channels in the rooms. Moreover it can be learnt that these customers prefer paying in cash rather than with credit cards. Seasonality is not a key issue when examining their number of arrivals through the year.

The present Russian speaking tourist wave is not a temporal trend but a prosperous market segment which will continue to increase on long term. Local tourism players have already made steps in satisfying this Russian demand even more professionally and their adaptation is still happening.

Residents involved in tourism are constantly developing in order to better meet the expectations of the Russian, Belorussian and Ukrainian markets. The core points of their progress are in connection with human resources, marketing activities and cultural



assimilation based on the findings of this thesis. There have been encountered numerous signs of this adaptation in the Estonian resorts areas and according to the interviews service providers see incoming tourists from the Russian-speaking countries as valuable guests.

The adaptation of the labor force focuses on language development. Previously Estonian, Finnish and Swedish were the most essential languages in the tourism and hospitality sector of Estonia. At this time Russian forms part of this language group. Hoteliers need to understand the requests and problems defined by Russian speaking guests during their stay. Doctors and dentists must be able to communicate with them about symptoms, past medical history and the required treatments. Desk agents in the Tourism information centers have to explain about upcoming programs, exhibitions and bicycle rental. Shops and boutiques owners need trained staff members with the intention of explaining about products and realizing sales effectively. These are only a couple of reasons why communication is so important in the adaptation in Estonian resort cities. Accordingly staff members take part in Russian language courses, hotel managers employ Russian translators to assist the front office staff during check-ins and help the work of the in-house medical staff. Russian language knowledge is a great advantage for job applicants and becoming an elementary skill in local hotels.

Yet the basic requirement for implementing such actions in real life is still the constant cooperation between the government, the suppliers and the residents of the Estonian resorts regions. The lack of foreign language knowledge among Russian-speaking visitors can cause communication gaps at the destination. This issue was discovered earlier and by now promotional brochures and hotel forms are written in Cyrillic script and employees participate in language courses. The online content on the websites of the government, hotels, spas, dental and medical clinics are also available in Russian.

Cultural friction is generated by the different nationality views and behaviors. Such differences can only be handled with excellent communication skills. The most sensitive complaints are handled by the supervisors or the managers so they should be excellent communicators. This quality can be improved further with communication trainings where they could learn how to handle difficult guests or occurring conflicts between the guests.

This is strongly recommended that national holidays in the Russian Federation should be considered when setting prices and planning marketing campaigns. The main holidays are the New Year Holiday (1-6 of January), Orthodox Christmas Day (7<sup>th</sup> of January),

Defender of the Fatherland Day (23<sup>rd</sup> of February), May Day (1<sup>st</sup> of May) and Victory Day (9<sup>th</sup> of May). Normally when a public holiday falls on a Saturday or Sunday the free days continue from the next Monday. This creates bridge holidays with weekends when Russian tourists have the time to travel and rest. These dates should be targeted by Estonian spas with advertisements, discounts and special programs for guests from Russia, Belorussia and Ukraine.

In the author's opinion guests would like to see more of their own culture in Estonia. The so-called "banya", which is basically a Russian sauna, could be added to the spa facilities of Estonian spa complexes. The "banya" is cross between the Finnish sauna and the Turkish bath combining heat and steam in a wooden cabin. The ritual involves a special massage with a bunch of oak twigs soaked in water. It is an excellent wellness treatment for relieving stress and relaxing. The Russian language courses could be supported with communicational trainings for the managers and supervisors of the hotels enabling them to professionally handle requests or complaints by guests with different national background.

After getting all the possible data the author aimed at the adaptation of this information to the previous secondary research which was accomplished in the theoretical sphere. And first of all, it was interesting for the author, what kind of categories of tourists can be related the Russian tourists visiting Estonian spas according to the study of Tawil (2011). Taken everything into consideration, it was noticed that there are three groups of spa tourists from the Broad Typology of Spa Tourists can be identified.

First one is Explorers. These are the biggest group of respondents who are interested in the holistic and professional spa service experience. Some of them were not against to travel by their own if the conditions and the high standard quality could satisfy them. This group included mostly women of the age 24-30 years old. They were very active in the sport activities and were not afraid to try new interesting services or treatments (e.g. Aurveda). However, the active families with children also were included in this group. They can be described also as the Adventurers Type (see Appendix 1.). These people are quite curious and interested in trying new facilities and treatments which can be found in exotic destinations with various facilities and treatments.

The second is Socialisers who always like to travel in the group of other people. The theory of Tawil was proved by the particular research that these visitors are mostly females who would like to get the top-notch quality service and who are motivated by other people's suggestions. They are looking for well-developed premises with the variety of

treatments (e.g. different kind of massages, wraps), fancy restaurants, and healthy food. These women are of the middle age of 35-45 years old and have well-paid jobs which allow them to travel often and be aware of the different tourism destinations. They are travelling with their husbands and children, or with friends. This is a Social-oriented Type according to the Constructed Typology of Spa Tourists (see Appendix 1.). Rest and relaxation, variety of entertainments for different kind of leisure, and short distance to the resort destination are the main elements of the best holidays for them.

The Budgeters is the smallest and the last group. As it was noticed that the prices do not concern the Russian-speaking guests to Estonian spas so much, but still this factor was named by other people as the additional motivation. These people are relatively young and they are usually short of budget. In the case study of this research they are young women (students or starting the career young specialists) and they would like to find affordable spas and treatments such as massage and swimming pools (which was described as a luxury service in their countries of residence). Distance is an additional stimulus for them as they usually don't want to travel far from their residence place. Long distance means more tickets costs and in general enhance of the total trip price. This is the Low-Cost Physical Motivated Type tourists whose primary goal is to find the destination with the low price services, physical needs' satisfaction and affordable treatments and facilities.

This kind of spa tourists' typology provides a multi-dimensional approach that is based on the destination facility choice process. The dimensions which were applied to this research included The Health Dimension which is connected to the reasons of the spa visiting; The Choice Dimension, which was shown by the motivational factor affecting the choice of one spa destination over another based on the quality standards; and The Experience Dimension, which became quite important feature for the 21<sup>st</sup> century tourists. All these dimensions were used as a guide for the questions of the survey for customers, in order to ensure no important issues are overlooked. The author decided that this kind of research orientation could provide an important grounding for the systematic exploration of the customer profiles. While the concretization of the tourists' types could help to better understand the customers' expectations and experiences in the spas of Estonia.

As every research connected with the analysis of the real people considerations, emotions and other qualitative characteristics there are a number of limitations which can make the data conclusions quite subjective and depending on the author's analytical skills and knowledge. The particular research also had a few limitations which did not directly affect

the results of the research, but could be argued they could provide an insight or guidance for future research and for the Wellness and Spa industry as a whole.

One of the main limitations of this study related to the literature base. During the initial stages of the research, the limited amount of publications related to spa tourists' experience proved challenging. The classification of the Russian-speaking spa tourists was limited in terms of their profiles including the physiological and psychological characteristics, motivational factors and goals concerning the spa tourism particularly to Estonian resorts and tourism destinations. A major limitation of this study was its dependence on the questionnaire results as a primary research tool. The people's answers, by their very nature can be restrictive and can result in very limited and not complete information. One of the constraints of this research was the fact that some questions remained unanswered by some of the respondents, with some proving reluctant to fully respond to questions or to provide some kind of personal information (e.g. profession), resulting in some surveys garnering only a limited amount of data.

A further limitation of this study was the relatively small number of interviewees and the certain short period of time when this data had to be collected. It must be acknowledged therefore, because of such a small sample, the information and the analysis results gathered cannot be generalized. A further limitation to address is the inherent subjectivity of the researcher. The role of the researcher is employed to interpret and adapt the responses of the respondents, in this sense the interviewer is not a passive listener; occasionally responses offered to survey questions are brief and demand understanding and assessment. As it was noticed above, the application of the researcher's personal views or experiences influence the discretion and judgment of the research's results. In the development of the Russian-speaking customers' orientations and experiences the researcher's judgment was relied upon the nature of the qualitative data analysis. To sum up, it can be taken into consideration that there is a clear scope for future research in the spa industry which can be in particular important for the development of the Estonian spas' Wellness and leisure services quality as shown by the dearth of literature available. Further research should be devoted to the specific needs of different types of spa tourists from the Russian-speaking countries, which will contribute to further understanding of the nature of tourist attraction systems and provide an insight or guidance for other researchers.

It can be concluded that there should be additional empirical studies that employ a multidimensional approach based on cultural differences and investigating more specific

fields of the spa tourism industry. Indeed this is the aim of this research; to spark the interest to the deeper understanding of the foreign spa tourists' experiences based on empirical research (qualitative approach) that comprises several variables on a multidimensional approach.

There are several considerations which the spa manager and marketing manager propose for the development of the Wellness centre and adaptation of it for the Russian-speaking Europeans. They would like to have more luxury rooms, and also more beautiful treatment rooms, better possibilities for spa and water centre – saunas. However, they are planning the building of the new corpus of the water centre where they would like to add more options for saunas. Turkish baths and wet areas, areas such as sauna, steam room, baths, VIP baths, showers, Jacuzzi, adventure showers can be designed together. Even these areas can share a common rest area. And for Ukrainian and Belorussian people it is also the possibility to do different sports there in a well-developed sport environment.

There is a need also in the development of the special promotional programs exclusively for the region settled by the Russian-speaking people. As it was shared by the managers, the case study hotel usually organizes the workshops in the Russian cities such as Moscow, St Petersburg, and Pskov where they can make the promotion of the new offers and campaigns. However, nowadays not very many people are coming to the workshops, because they can find out everything via Internet. But in Ukraine and Belorussia the Estonian hotels still don't create the special workshops and promotion programs because they suppose that these countries still remain quite remote regions for them. Hence, it was proved by the author's calculations and the data comparison that the number of Ukrainian and Belorussian customers is growing gradually, then it can be recommended to develop small campaigns which will promote the spa services in Estonian resort through the cooperation with the local tourism agents in Ukraine and Belorussia.

While the Estonian resort can boast by the good ecology and well-maintained natural attractions, the possibilities for the sport and different leisure activities are also available. While Estonian spas, and Pühajärve Spa and Holiday Resort in particular, think positively about the extension of the various target groups like families, young active people who want to do sport there, and also more rich people who are eager to pay for the high quality treatments and services, it is advisable to create mixed-activities programs. Some kind of sport activities can be offered as additional individually-chosen services included in the specially-developed packages.

Another aim for the future progress of the Estonian Wellness and Spa hotels is the improving and further development of special wellness services. Relaxation treatments are now more interesting for people and in a high demand. While Estonian people are still the main target market customers for these centers, they would like to get some rest there and relaxing atmosphere. It can be concluded that the Russian customers are quite the same, as they don't want too much medical procedures but would like to try the pure relaxation treatments like wraps and body care treatments.

To be in tune with the world-class Spas' trends, the Estonian spa resorts should have many unique aspects. Location, design, architecture, size and proportion, harmony of the color and texture of the space, feeling aroused by the place, function or special treatment and massage opportunities should be adapted and mixed in design. Such concepts as "relaxation and recreation" "escape", "self-reward and tolerance" and "health and beauty" are important motivation tools that encourage going to spas. Russian-speaking customers are effected by desires as physical relaxation, self-rewarding, self-indulgence, mental peace, they would like to get away from the business and social life stresses (especially if they are living and working in big cities such as Moscow, Kiev, Sank-Petersburg), to improve the overall health, to experience spa life, to enjoy mental relaxation, to experience a luxury item, to benefit from the latest spa treatments, to increase physical attractiveness, rejuvenation, having good time with friends or relatives, to lose weight, to keep up with a popular item are also among the motivation tools.

The next spa trend which can be beneficial for the Estonian spas concerning the Russian-speaking clientele is the development of the spa menu for men. While some of the spas are designed as unisex some of them can be divided as woman and man depending on the cultural requirements. Just a couple years ago the term "metrosexual" (referring to a niche group of men hyper-meticulous about appearance) caused knowing laughter, but now the term just feels silly and obsolete. Men globally are not afraid of spending money on their looks and the male spa procedures markets are exploding. That is why Estonian spas are going in the right direction willing to build out comprehensive, for-men "beauty" menus: whether skincare, manicure-pedicure, waxing and threading services.

In addition, it was noticed during the research that Russian-speaking customers are quite interested in the ecological eating concept. More nutritious and customized food and beverage offerings (including gluten-free and vegan menus) are becoming common at spa hotels in Estonia. This feature can become the unique trademark which will differentiate

Estonia from other countries. This destination has very good conditions for developing the eco-concept in Food and Beverage as an element of the restorative spa program while it has well-developed farms which supply the locally-grown products.

For higher level of services, managers must hire persons who graduated a faculty of tourism or persons which have an appropriate qualification diploma. Also, managers must take care of soft skills (how to act in a urgent or critical situation, how to make a good day for your client etc) and abilities, and must offer to their employees trainings on this kind of needs. It also depends on importance given to employee involvement in professional development programs. They are those who are in direct contact with tourists and they know that a satisfied customer is a reliable source of positive publicity. The employers are those who bring added value services.

## CONCLUSION

As international spa business organizations embark on global competitiveness, managing inter-cultural communication, cultural differences, and cross cultural negotiation and decision-making are the most common challenge to international management. In order to reach success in such ventures managers must be able to communicate effectively with people from different backgrounds and nationalities. This is a two-side communication which relies on the subordinates on the one hand, and customers – on the other hand. Because communication is culture-bound and culture specific, it is necessary that countries involved in international Wellness and Spa business devote adequate time to learn, understand, and appreciate the different cultural and ethical habits in order to develop the industry on a global scale.

The main aim of this study was to explain and prove that the world spa industry has to be in tune with the cultivating cross-cultural awareness, and developing multicultural sensitivity and global mindset by executive managers for sustainable growth of this business. And Estonian spa resorts with its fast progress were taken as a main region for the research. Health tourism and active tourism are the most popular sectors among visitors from the Russian Federation, Ukraine, and Belorussia. That is why the most important research question was: are the Russian-speaking customers' expectations satisfied in Estonian resorts? According to this research question the author developed the hypothesis that the Russian-speaking target market matters for Estonia Wellness and Spa industry providers and this is one of the most important clientele segments for Estonian resorts.

It was proved that based on many theoretical considerations (Messerli and Oyama, 2004; Langviniene and Sekliuckiene, 2009) the tourists from Russian-speaking countries reflect the global trends which claim that the spa client nowadays is well informed, more quality-oriented, independent, and more difficult to entertain, amuse and satisfy.



It can be concluded that the Russian-speaking visitors' expectations and needs are quite satisfied with the Estonian resorts' quality. Among countries of the particular case Russian people take the biggest niche of the tourism target market of Estonian resorts. Hence, the number of people from Ukraine and Belorussia is increasing annually. The age category includes young independent people and middle-aged families with children. Most of the tourists coming to Estonian spas are females who would like to find relaxation and rest.

However, it was an interesting proved fact that the gender changes are shown while bigger number of male clients would like to visit the Wellness centers. They are willing to use and very satisfied with the newest treatments-for-men concepts. This means that the change in the Russian-speaking male customers' attitude to the special treatments is changing and they don't see anything shaming in such kind of relaxing, stress relieving and health restoring services.

Furthermore, the better awareness of the Russian-speaking clients about the spa procedures and the quality standards is noticed during the research. People from these countries nowadays started to travel often and in other countries they could try and then compare the spa services. They want to follow the healthy and active life style with the possibility of differentiated leisure activities. And Estonian resorts are suitable enough for this kind of desires.

The main reason why the Russian-speaking clientele is rising in Estonia is that all the tourists consider the quality of the same spa services in their home countries to be lower and they value the Estonian spa standards more. The good feature for the Estonian spa service stakeholders is that Russian people are not concerned about the sales prices. They think that the quality can cost money and they are eager to pay in return to the satisfaction guarantee. Only small percent of Russian women are thinking about the better deal and cheaper services. The only possible explanation can be their financial stability while they are mostly single travelers. However, the mixture of good service and appropriate prices in Estonian resorts can be an important motivation for the customers from Russia, Ukraine and Belorussia.

For Russian-speaking customers is important to find some kind of signs of their traditional culture as they usually are not prepared for the cultural shock. Even if they are quite adventurous and eager to try something new, they would like to see some traditional wellness treatments such as Russian banya in the spa menus of the hotels. Public safety in the resort city plays an important role too. After the hectic life style in huge mega-polices

(e.g. Moscow or Minsk) Russian-speaking customers want to slow down their life tempo and relax without being afraid for their safety.

It was interesting for the author of this thesis to prove that Estonian and Russian traditions are different while these countries seem to be very close in their historical development. The author considers her goal to be completed.

Obviously, there were several limitations for the particular study. The most important one was connected to the difficulty to explain to the respondents the terms “service encounter” as well as the term “service” itself. The ending stage of the high season, the small sample size, the short period of data collection, the specificity of the questions and respondents' group chosen especially for the particular research, the limited literature data base connected to the classification of the Russian-speaking spa tourists in terms of their profiles including the physiological and psychological characteristics and motivational factors are the additional limitations for the research too. And the final limitation is the inherent subjectivity of the researcher. The interpretation of the results can be diverse and broad, this depends on the researcher's experience and the ability to apply the theoretical knowledge to practical tasks. But all these limitations couldn't directly affect the results of the research while the study was completed following the educational guidance and the rules for such kind of research.

There can be concluded that the hypothesis of this study telling that the Russian-speaking target market matters to the Wellness and Spa Sector in Estonia was proved during this research. However, some of the objectives raised more questions which can be adopted for the further research. First of all, based on the limitations of the chosen research method (questionnaire) the evaluation of the domestic differences of the Wellness and Spa Supply of products and services in Estonia cannot be adequately evaluated because of the limited space-frames. The only possible way to know about the other Estonian Spa hotels' practices except Pühajärve Spa and Holiday resort was the word-of-mouth of the small number of respondents having such experience before.

Concerning the recommendations which were given by the author, they were based mostly on the customers' feedback on the survey questions. While the questionnaire was devoted to the motives and factors which are behind the visit of Russian-speaking clients these can play an important role in realization improved practices into the Wellness and Spa industry in Estonia not only for the particular market, but for the majority of foreign tourists as well

(Tawil, 2011). The perceived value (Hu (Sunny), Kandampully, Juwaheer, 2009) can be adapted also through the open-ended questions which asked the respondents to describe their expectations and the knowledge about the Spa service providers in the case country.

Hence, there can be noticed the lack of information while not all the respondents wanted to share their thoughts and suggestions. The further research which will embrace this particular matter is needed.

Among the findings is the fact of the customer profile change during the recent time. It was noticed that the cultural differences give a challenge for the Estonian spa service providers to guarantee the high-quality standards for the Russian-speaking clientele while this type of customers is characterized by the wish to get the mix of new services with traditional ones which are favorite for them in their home country. However, the problematic issue which gives some misleading information for the Russian-speaking customers visiting Estonia is that the strategy to create the image of Estonia as a Wellness destination does not exist nowadays yet (Tooman, 2010), that is why it is difficult to make the suitable offer which can include the Russian-speaking target market's expectations and perceived company's image.

To sum up, the main goals of the study were accomplished and the results are quite new and up-to-date according to the newest trends of global business development. They can be used for future research in the sphere of customer experience specifically in the Wellness and Spa industry.

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## APPENDICES

**Appendix 1.** The types of the tourists grouped by Tawil (Constructed typology of Spa Tourists)

| Types                                   | Characteristics   |
|---|---|
| (1)<br>The High-Class Type              | Looking for perfection<br>Best facilities and Treatments<br>Price is not an issue<br>Older people with high income<br>Seeking physical and psychological treatments<br>Seeking five star destination spa    |
| (2)<br>Social Oriented Type             | Socialise with friends and family<br>Seeking rest and relaxation<br>Short stay and short distance spa<br>Emphasized the importance of entertainment facilities such as restaurants, cafes with healthy food |
| (3)<br>Low-Cost Physical Motivated Type | Price is major issue<br>Seeking physical needs<br>Affordable treatments and facilities<br>Emphasized the importance of massages   |
| (4)<br>Low-Cost Holistic Type           | Price is major issue<br>Seeking psychological needs<br>Affordable spa holiday<br>Emphasized the importance of swimming pools and gardens  |



### Appendix 1. continued

|   |   |
|---|---|
| <p>(5)</p> <p>The Dreamers Type</p>                       | <p>Seeking rest and relaxation</p> <p>Different cultural backgrounds</p> <p>Perfect spa holiday</p> <p>Affordable not expensive</p> <p>Well established facilities and treatments</p> <p>Good reputation</p>                      |
| <p>(6)</p> <p>The Adventurers Type</p>                    | <p>Curious</p> <p>Try new facilities and treatments</p> <p>Exotic destinations with various facilities and treatments</p>   |
| <p>(7)</p> <p>Image-Dependent Physical Motivated Type</p> | <p>Seeking physical treatments</p> <p>Very concerned about the image of the spa</p> <p>Reputation and being recommended</p>   |
| <p>(8)</p> <p>The Tactful Type</p>                        | <p>Seeking rest and relaxation</p> <p>Neat and tactful</p> <p>Older women with high income</p> <p>Emphasized the importance of cleanliness of a spa</p> <p>Reputation</p>   |
| <p>(9)</p> <p>Peaceful and Nature Lovers Type</p>         | <p>Location of the spa and its surroundings</p> <p>On their own</p> <p>Connect with nature</p> <p>Facilities and treatments such as hiking and yoga</p>   |
| <p>(10)</p> <p>The Organized Type</p>                     | <p>Highly dependent</p> <p>Seeking rest and relaxation</p> <p>Work long hours</p> <p>Time is an issue</p> <p>Book their own spa holiday/own experience</p> <p>Facilities and treatments such as massages, Jacuzzis and saunas</p> |

## Appendix 2. Questionnaire for customers in Russian language

### Спа отели в Эстонии: характеристики и оценка сервиса

Добрый день! Меня зовут Кристина. Я студентка Университета Тарту Пярну колледж. В данный момент я провожу студенческое исследование, которое необходимо мне для дипломной работы. Тема моего исследования: потребности русскоязычных посетителей в эстонских спа отелях. Не возражаете ли вы, чтобы ответить на несколько вопросов? Это займет всего несколько минут Вашего времени. Личные ответы будут строго конфиденциальны и выгодны для моего исследования и развития спа туризма Эстонии.

**1. Вы когда-нибудь посещали Эстонию раньше?**

☐ Нет

☐ Да

Если да, то сколько раз? \_\_\_\_\_ (исключая этот визит)

**3. Получили ли вы все, что ожидали от данной поездки?** ☐ Да

☐ Нет

Если нет, то что вас разочаровало? \_\_\_\_\_

**5. Какие основные причины были у Вас для поездки в Эстонию?** ☐ Природа ☐ Качество

спа и гостиничных сервисов ☐ Выбор спа сервисов и услуг ☐ Другое (что именно) \_\_\_\_\_

**6. С кем вы путешествуете?** ☐ Один

☐ С семьей, друзьями

**7. Была ли ваша поездка организована туристическим агентством?** ☐ Да

☐ Нет

**8. Довольны ли вы сервисом в данном отеле?** ☐ Да

☐ Нет

Если нет, то почему? \_\_\_\_\_

**10. Считаете ли Вы, что спа сервис в Эстонии развит лучше, чем в Вашей стране?** ☐ Да

☐ Нет

**11. Что для вас является наиболее важным в спа отеле?** ☐ Общая атмосфера, дизайн

☐ Хороший сервис ☐ Выбор процедур ☐ Низкий уровень цен ☐ Свободный доступ, досягаемость ☐ Другое (что) \_\_\_\_\_

## Appendix 2. continued

12. Какими спа/оздоровительными сервисами вы чаще всего пользуетесь в спа отелях?) ☐  
Фитнес центр ☐ Медицинские процедуры ☐ Релаксация(массажи, обертывания)

☐ Водный центр ☐ Другое \_\_\_\_\_

13. Пользовались ли Вы данными видами процедур спа во время отдыха в Эстонии?

☐ Соляная камера ☐ Новые виды массажей ☐ Новые виды обертываний

☐ Другое (что именно) \_\_\_\_\_

14. Ваш пол ☐ Женщина ☐ Мужчина

15. Год Вашего рождения? \_\_\_\_\_

16. Уровень образования? ☐ Среднее общее (школа)

☐ Среднее профессиональное (Колледж, Училище)

☐ Высшее (Университет, одна специальность)

☐ Высшее профессиональное (две и более степеней)

☐ Другое, какое? \_\_\_\_\_

17. Страна проживания? \_\_\_\_\_

18. Ваша профессия (работа) в настоящее время? \_\_\_\_\_

19. Сталкивались ли вы с проблемами, находясь на отдыхе в спа отелях в Эстонии? ☐

Нет

☐ Да

20. Если да, то с какими именно? \_\_\_\_\_

21. И в заключение, есть ли у Вас какие-нибудь комментарии по поводу развития гостиничного дела, спа бизнеса в Эстонии, замечания или рекомендации?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Большое спасибо за участие!

### Appendix 3. Questionnaire for customers in English language.

#### SPA HOTELS IN ESTONIA: CHARACTERISTICS AND SERVICE EVALUATION

Hello! My name is Kristina. I'm a student of the University of Tartu Pärnu college. I am doing student research which I need for my graduation paper. The topic of my study is "Russian-speaking visitors' expectations and needs in Estonian spas". Would you mind answering a few questions? This will take a few minutes of your time. The individual answers will be confidential and highly beneficial to our studies and the tourism development of the place.

**1. Have you visited Estonia before?**

☐ No

☐ Yes

**If yes, how many times? \_\_\_\_\_ (excluding this visit)**

**3. Did you get everything that you expected from this trip?** ☐ Yes

☐ No

**If not, what kind of disappointment can you figure out? \_\_\_\_\_**

**5. What attracted you most in visit to Estonia?** ☐ Nature ☐ Quality of spa and hospitality services

☐ Choice of spa and wellness services ☐ Other (what exactly) \_\_\_\_\_

**6. Who are you travelling with (group type)?** ☐ Alone

☐ Family, friends

**7. Is your trip organised by a travel agent?** ☐ Yes

☐ No

**8. Are you satisfied with the service provided in this hotel?** ☐ Yes ☐ No

**If not, then why? \_\_\_\_\_**

**10. Do you think that the spa service in Estonia is better developed than in your country?** ☐ Yes

☐ No

**11. What is the most important for you in the spa hotel?** ☐ The whole atmosphere, design

☐ Good service

☐ Choice of treatments

☐ Low price level

☐ Good accessibility, short distance

☐ Other \_\_\_\_\_

### Appendix 3. continued

12. What are the services you use more in the hotels/spa hotels? ☐ Fitness centre  
☐ Medical treatments  
☐ Relaxation (massages, wraps)  
☐ Water centre  
☐ Other

13. What kind of new treatments did you find in spas in Estonia?

- ☐ Salt chamber ☐ New kinds of massages ☐ New kind of wraps  
☐ Other (what exactly) \_\_\_\_\_

14. What is your gender ☐ Female ☐ Male

15. What is your year of birth? \_\_\_\_\_

16. What is your educational level? ☐ Primary  
☐ Secondary  
☐ Tertiary  
☐ Other, what? \_\_\_\_\_  
\_\_\_\_\_

17. What is your current country of residence? \_\_\_\_\_

18. What is your profession (work)? \_\_\_\_\_

19. Did you have any problems while you were spending holidays in the spa hotel in Estonia?

- ☐ No ☐ Yes

20. If yes, what kind of problems? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

21. Finally, do you have any comments concerning the hospitality services, spa business in Estonia, critics or recommendations?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Thank You very much!

**Appendix 4.** Interview with Liina Lambot-Lepp (Marketing manager of Pühajärve Spa and Holiday Resort)

1. What are the main reasons Russian people coming to Pühajärve Spa?
2. Are they mostly interested in Medical or Wellness treatments?
3. What are their demographic characteristics (e.g. gender, age, group type)?
4. What do you think is the most important feature in your hotel for the Russian-speaking customers?
5. Are Russian people interested in the concept of the eco-shop products and the eco-food in the restaurant?
6. What elements can be included in the holistic Wellness experience in your opinion?
7. How important is the Russian-speaking target market for your company and do you want to develop better cooperation with Russia, Ukraine, and Belorussia?
8. Based on the customers' feedback what can be improved and added to the spa?
9. What kind of services are the most favorite ones for Russian customers in your hotel?
10. How do you organize the marketing strategy for the Russian market?
11. Would you like to develop the cooperation with tour operators in Belorussia, Ukraine, or Russian market is still of the higher priority?
12. How do you see the future of the Pühajärve Spa?

**Appendix 5.** Interview questions for Triin Saareots (Spa manager of Pühajärve Spa and Holiday Resort)

1. What are the main reasons Russian-speaking people coming to Pühajärve Spa?
2. What kind of spa treatments and service are most popular ones in the centre for the Russian-speaking clientele?
3. How much are people interested in the medical treatments?
4. Do the Russian customers provide feedback where they express their wish for some developments in the hotel?
5. Do you think that there is a lack of some kind of procedures, treatments choice? What else can be needed?
6. Do you have the constant customers who come every year?
7. What do you think the most important thing in your hotel which customers from Eastern European countries want to find?
8. What kind of the packages are more interesting for people Russia, Ukraine, and Belorussia?
9. What kind of package would you like to develop also?
10. How can you describe what does Wellness mean for you?
11. How can you describe the mission and vision of the Pühajärve Spa?
12. What kind of direction in specialization should have the Pühajärve Spa in the future?

**Appendix 6.** The design of the Pühajärve Spa and Holiday Resort



**Picture 1.** The front view of the hotel



**Picture 2.** The back view of the hotel, park area



## Appendix 6. continued



**Picture 3.** Salt chamber



**Picture 4.** The design of the spa hall



**Picture 5.** Swimming pool and Jacuzzi

## РЕЗЮМЕ

### АНАЛИЗ РУССКОГОВОРЯЩИХ КЛИЕНТОВ: ОПЫТ ЭСТОНСКИХ СПА

Кристина Бельвебер

Для того, чтобы разработать необходимую концепцию, на которой было построено данное исследование, довольно важно было объяснить, почему автором были выбраны конкретные темы для этой работы. В связи с ускорением глобализации во всем мире, которая очень тесно связана со сферой гостеприимства, существует необходимость координации предпринимательской деятельности на основе понимания особенностей международных клиентов. В сфере туризма и восстановительного отдыха курорты являются одной из самых быстроразвивающихся отраслей, в которой заинтересованы миллионы людей по всему миру.

Международные компании не могут быть ориентированы только на стереотипы, которые глубоко укоренились в сознании общества. Для изменения соответствующих социальных установок необходимо провести новые исследования, чтобы понять, культурные различия могут быть согласованы (Fons Trompenaars, 2003).

Тема данной диссертации - "Анализ русскоговорящих гостей: их опыт в эстонских спа". Автор этой работы прошла период профессиональной стажировки в Пюхаярве Спа в городе Отепя, Эстония, для того, чтобы собрать необходимую информацию для подготовки данного исследования. Данная диссертация преследует несколько конкретных задач. Во-первых, необходимо было проанализировать важность русскоговорящего целевого рынка туристов в области оздоровительного туризма и спа индустрии в Эстонии. Для более детального анализа было также важно сравнить предложение оздоровительных услуг в Эстонии с ожиданиями и потребностями русскоязычных гостей. Результаты и выводы данного исследования могут быть

использованы эстонскими курортами и спа центрами для улучшения и адаптации своих услуг под конкретный целевой рынок русскоязычных клиентов.

Автор данной работы пыталась проанализировать зависит ли выбор клиента от национальности и культурной принадлежности, и каким образом данные характеристики влияют на удовлетворенность заказчика услуг. На основе таких знаний сотрудники спа центра могут лучше понять, какое значение профессиональных услуг они пытаются довести до клиента и какого результата они хотят добиться от взаимодействия с клиентом.

Гипотеза исследования заключается в том, что русскоговорящий целевой рынок в достаточной мере важен оздоровительному и спа сектору в Эстонии. Культурные различия являются зачастую проблемой для компаний-поставщиков спа услуг в области обеспечения высоких стандартов качества для международной клиентуры. Тем не менее, эстонский и русский народ всегда имел длительные исторические связи и отношения, которые все еще развивается. Автор этого тезиса решила взять русскоязычный целевой рынок в Эстонских спа из-за внешнего сходства эстонских и русских традиций, связанных с оздоровительным туризмом. Однако, хотя кажется, что эти страны очень близки в их историческом развитии, в ходе исследования могут быть найдены некоторые различия, которые связаны с ожиданиями и опытом русскоговорящих туристов в Эстонии.

В рамках исследования было решено включить только туристов из таких стран, как Россия, Украина и Белоруссия. Такого рода фокус может помочь исследователю получить более полное представление о странах, которые близки друг к другу исторически, географически и социально, но и проанализировать насколько важную роль русскоговорящие клиенты играют в эстонской сфере спа услуг.

Последние исследования (Langvinienne Neringa, Sekliuckiene Jurgita, 2009) показывают, что число более молодых (менее 30 лет) клиентов оздоровительных центров значительно возросло. Гендерные изменения и приоритеты также довольно очевидны, так как число мужчин-потребителей спа услуг растет с каждым годом.

В данной работе благодаря проведенному исследованию целевого рынка также было возможно выявить определенные типы спа туристов, основываясь на учении Тавила (2011). Данные ученым категории могут объяснить некоторые характеристики спа клиентов в зависимости от их поведения и выявить их ожидания от курортов, на

которых они проводят свой отпуск. Изменения в образе современных туристов также отмечены в работе Яна Йеомана (Yeoman, Introduction, 2012).

Было отмечено, что помимо оздоровительного туризма русские, белорусские и украинские посетители также склонны принимать участие в активной туристической деятельности, которую может предложить регион. Для русскоговорящих клиентов также важны традиционные и знакомые оздоровительные процедуры.

В данный момент русская туристическая волна в Эстонии – это не временная тенденция, а процветающий сегмент рынка, который будет продолжать расти и развиваться. Культурные различия и трения порождают разные национальные взгляды и модели поведения. Разрешить противоречия возможно только с помощью отличных коммуникативных навыков.

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